



How to Build an AI Plan for Your School or Nonprofit: A Starter Guide

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Overview

Artificial intelligence (AI) is changing how schools and youth-serving organizations teach, serve, and operate. It presents real opportunities, along with serious risks. The challenge for education leaders is not to adopt AI as quickly or broadly as possible. It is to determine how to use AI responsibly and strategically, in ways that advance the organization's mission.

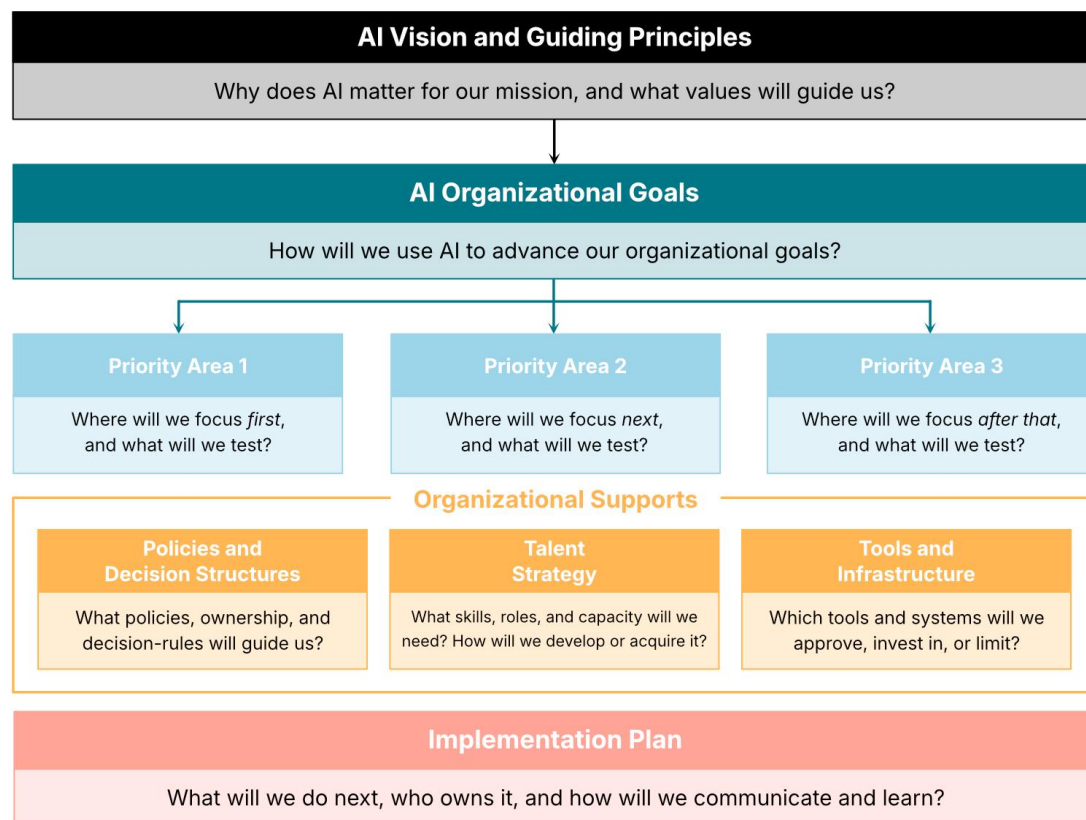
This starter guide draws from the planning framework used in Bellwether's AI Strategy and Skill-Building Cohort. It includes three quick-start activities to help your team:

- 1. Identify promising use cases and priority workflows** (Activity 1).
- 2. Assess your organization's current AI readiness** (Activity 2).
- 3. Determine where focused planning, testing, and next steps are needed** (Activity 3).

These activities work best with a small, cross-functional group rather than a single leader or technical team. Depending on your organization, this might include the executive director or school leader, an operations or technology lead, an instructional or program leader, a talent or human resources leader, and staff who are already experimenting with AI or who will be affected by future decisions. Teams can use these activities in a leadership meeting, planning retreat, board discussion, or early AI working group conversation.* The goal is not to complete a full AI Plan in one sitting. It is to build shared understanding, identify the most important questions, and create a clear starting point for deeper planning.

Note: *The set of three activities is also available via downloadable PDF and Google Docs formats.

Bellwether's AI Planning Framework



An AI Plan is a practical, organization-level strategy for how your team will approach the integration of AI over the next two to three years. Bellwether's framework moves from a high-level vision to focused priorities, then to the organizational support and action roadmap needed to make progress.

A clear AI Plan helps your team tell a coherent story about what you will do, what you will not do, why it matters, and how you will act. This clarity helps bring stakeholders along, focus limited resources, and keep your organization grounded as AI tools, opportunities, and pressures evolve.

It also helps ensure that your organization uses AI to advance its mission, not to pursue "AI for AI's sake."

Activity 1: Exploring AI Opportunities Across Your Organization

Through Bellwether’s organizational planning work with schools, networks, nonprofits, and youth-serving organizations, most AI use cases under consideration fall into three broad priority areas:

Priority Area	What It Means	Example Use Cases	Example Pilots From the Cohort
Direct Service and Learning	AI directly changes or extends the experience of students, participants, families, or beneficiaries.	Supporting student practice and feedback; extending advising, coaching, or participant support; answering common family or constituent questions.	• Pilot a student-facing instructional tool in one classroom or program that gives live feedback on student writing. • Create a family or participant FAQ AI assistant to answer questions after hours.
Staff Practice and Support	AI helps staff deliver stronger instruction, advising, coaching, case management, or participant support.	Preparing lessons or interventions; synthesizing student, participant, or case data; drafting follow-up plans; tailoring family or participant communications; identifying patterns across feedback, notes, or data.	• Draft reteach plans from assessment data. • Create student or program participant snapshots before support meetings.
Organizational Capacity and Insight	AI improves internal systems, workflows, knowledge, reporting, operations, finance, or decision-making.	Improving organization-level knowledge management; streamlining HR, onboarding, compliance, finance, and grants; drafting board or leadership summaries.	• Use a repeatable AI-enabled workflow to track employee time off. • Create interactive onboarding guides from existing employee handbooks.

After reviewing the three priority areas above, use the table below to explore where AI is already showing up in your organization and where focused experimentation might be useful. You do not need to identify an opportunity in every area.

For each priority area, discuss:

1. What are we already trying?

- Where are staff already using or testing AI?

2. What feels worth exploring?

- What needs, bottlenecks, or recurring challenges could AI help with?
- Which idea feels valuable, feasible, and aligned with our goals?
- What small pilot would help us learn before a bigger commitment?

3. What should we avoid for now?

- Where might AI create risks related to privacy, equity, accuracy, relationships, or professional judgment?
- Are there uses that do not align with our mission or priorities?

Priority Area	Already Trying	Worth Exploring	Avoid For Now
Direct Service and Learning			
Staff Practice and Support			
Organizational Capacity and Insight			

Activity 2: AI Planning Readiness Check

Use this tool as a discussion guide to reflect on where your organization stands across the core elements of an AI Plan.* For each element, select the description that best fits your current state. This is not a formal scorecard and there are no right or wrong answers; it is designed to prompt discussion, identify patterns, and decide where your team needs more clarity. If your results are mostly:

- **Early:** Consider building basic AI literacy, discussing mission alignment, and identifying where AI is already affecting your stakeholders or the field.
- **Ad Hoc:** Consider building shared understanding, clarifying vision, and setting basic guardrails before expanding AI use.
- **Emerging:** Consider prioritizing use cases, defining success measures, and strengthening policies, tools, and staff training.
- **Strategic:** Consider moving toward implementation, learning, scaling, and continuous improvement.

AI Plan Element	Early	Ad Hoc	Emerging	Strategic
Vision	AI is not yet part of strategy conversations, or leaders have not discussed how it connects to the mission.	AI use is happening, but there is no shared view of how it connects to mission or long-term direction. Conversations are often tool driven or reactive.	Leaders are beginning to discuss how AI might support or threaten the mission, but the desired future state is not yet clear.	The organization has a clear, mission-aligned vision for AI, including key opportunities, risks, and what should remain deeply human.
Guiding Principles	The organization has not yet considered what values, norms, or guardrails should guide its AI use.	AI decisions are made case by case, with few shared principles for balancing innovation, safety, equity, privacy, and quality.	The organization has started to name values or guardrails, but they are informal, in draft form, or not yet used consistently.	The organization has clear principles that guide AI decisions across teams and help staff navigate trade-offs, risks, and opportunities.

Goals	The organization has not yet explored what AI might help improve, or whether it belongs in the strategy.	The organization has not defined what AI should help improve. Use may be driven by curiosity, urgency, individual interest, or outside pressure.	The organization has identified possible goals, such as time savings, quality, access, or staff capacity, but they are not yet prioritized or measurable.	The organization has a small set of clear, mission-aligned goals with measurable outcomes to assess whether AI is helping.
Priority Areas, Use Cases, and Pilots	The organization has not yet identified potential AI use cases or where AI might be relevant.	Use cases are scattered. Staff may be experimenting independently, but there is no clear process to prioritize, test, or scale.	The organization has identified possible use cases and is beginning to sort them by value, risk, and feasibility. Some pilots may be underway.	The organization has prioritized focused use cases aligned to its vision, principles, and goals. Pilots test clear problems, manage risk, and generate learning.
Organizational Supports: Talent, Policies, and Tools	The organization does not yet have AI-related policies, tool guidance, staff training, or clear ownership.	Policies, training, tool guidance, or ownership structures are limited. Staff may be unsure of what is allowed, what tools to use, or where to get support.	The organization is building support for responsible AI use, such as draft policies, training, approved tools, or ownership structures, but gaps remain.	The organization has clear guardrails, tool guidance, staff learning supports, ownership, and a process for updating practices over time.
Implementation Plan	The organization has not yet defined AI-related next steps.	AI-related work is not sequenced or assigned. Next steps may be unclear, informal, or dependent on a few interested individuals.	The organization has some next steps or early plans, but timelines, owners, communications, and stakeholder engagement need more clarity.	The organization has a clear roadmap with priorities, timelines, owners, decision points, communications, and stakeholder engagement. The plan is updated as the organization learns.

Note: *Take Bellwether's interactive quiz-version of Activity 2 — [Where Do You Stand: An AI Readiness Self-Assessment](#) (Disclosure).

Activity 3: Leadership Team Discussion Guide

Use the questions below to bring together what you learned from the readiness check and use-case opportunity scan to begin shaping your organization's AI Plan. You do not need to answer every question at once or in full. Start with the areas where your team has the most energy, urgency, or uncertainty.

AI Plan Element	Questions to Discuss
Vision	• How might AI help us better pursue our mission? • Where might AI create risks to our mission that we need to manage? • What parts of our work should remain deeply human?
Guiding Principles	• What values or decision criteria should shape our AI use? • How will we balance innovation with safety, equity, privacy, and quality?
Goals	• What organizational outcomes do we hope AI will improve? • Are we focused on time savings, quality, access, staff capacity, student learning, or field leadership? • How will we know whether AI is helping us achieve our mission?
Priority Areas, Use Cases, and Pilots	• Where are the biggest needs or bottlenecks for our organization that AI might help address? • Which use cases align most closely with our mission and goals? • What small pilot might help us test the idea before scaling it?
Organizational Supports: Talent, Policies, Tools	• What policies or guardrails do we need? • What AI skills do staff have currently and need for the future? • Who will own AI implementation over time? • Which tools should be approved, limited, or avoided?

Implementation Plan

- What should happen in the next 90 days?
- What should happen over the next year?
- Who owns each part of the work?
- How will we communicate and revisit the plan?
- How will we engage stakeholders throughout?

About the Authors



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About Bellwether

Bellwether is a national nonprofit that works to transform education to ensure young people — especially those furthest from opportunity — achieve outcomes that lead to fulfilling lives and flourishing communities. Founded in 2010, we help mission-driven partners accelerate their impact, inform and influence policy and program design, and bring leaders together to drive change on education's most pressing challenges. For more, visit bellwether.org.

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For more Bellwether AI resources, see [How to Build an AI Plan for Your School or Nonprofit: A Starter Guide](#).

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PARTNER WITH US

Bellwether's [AI team](#) has deep experience helping education and nonprofit leaders build practical AI strategies, identify high-value use cases, pilot tools and workflows, and manage the risks and organizational changes involved in adoption.

Partner with us to understand where AI fits within your mission and goals, build the skills and systems needed to use it responsibly, and turn early ideas into focused plans and measurable action.

DISCLOSURE

AI tools were used in the development of the "[Where Do You Stand: An AI Readiness Self-Assessment](#)."

Parameters and information were entered into Claude Opus 4.8 and refined, reviewed, edited, and implemented in Flourish with human oversight.