

Education

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ARTIFICIAL INTELLIGENCE

Environment

Entertainment

AI Guide 2.0

Practical Insights for Associations

By Jeanne Sheehy *(and some powerful AI tools for inspiration)*



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When Bostrom published AI Guide 1.0 in January 2025, our goal was to help associations move from curiosity to readiness: establishing guiding principles, creating governance structures, and cultivating early experimentation. That version laid the foundation. It prompted us to ask associations “Where might AI help us?” and “What guardrails should we use?”

But in just nine months, the pace of AI advancement and adoption has accelerated in ways many didn't anticipate. Models are more capable, costs of inference have dropped, new tools have emerged, and organizations are pushing boundaries.

The background of the lower half of the page features a large, stylized 'AI' logo in a dark purple color. The letters are bold and blocky. Below the 'AI' text, the words 'ARTIFICIAL INTELLIGENCE' are written in a smaller, lighter purple font. The entire logo is set against a background of intricate, wavy, purple and white lines that resemble a topographical map or a complex data visualization. Scattered throughout this background are numerous small, yellow and white dots, and several thin, yellow circuit-like lines with small circles at their ends, suggesting a digital or technological theme.

AI

ARTIFICIAL INTELLIGENCE



SO...what's changed since January 2025?



Healthcare:

AI-driven drug discovery pipelines are now moving multiple compounds into clinical trials faster than ever, with timelines reduced by as much as 40%. AI-assisted radiology tools are expanding beyond diagnostics into treatment planning for oncology and cardiology. Patient-facing AI “copilots” are beginning to support personalized care planning.



Education:

Generative AI is now powering personalized tutoring at scale, with some higher-ed institutions piloting AI “teaching assistants” integrated into learning management systems. Associations are adopting AI to deliver adaptive learning paths for credentialing and CE programs, helping members upskill more efficiently.



Entertainment:

AI-generated media has exploded: synthetic voices and avatars are now used in mainstream productions, reducing production costs and enabling hyper-localized content (ever hear of AI “Actress” Tilly Norwood?). Streaming platforms are leveraging AI to personalize recommendations in real time, not just by past behavior but by predicted mood and context.



Administration:

In association management and beyond, AI copilots are automating meeting minutes, board reports, and HR processes. Recruitment AI is widely used for candidate screening, while finance copilots help with forecasting and fraud detection. Based on estimates from other industries, we’re estimating that associations will be able to achieve efficiency gains of 20–30% in back-office operations through AI augmentation.



Transportation:

Waymo now operates in nine U.S. cities, and several states are testing autonomous freight corridors. AI traffic management pilots are showing reduced congestion and emissions in urban centers. Associations in logistics and transportation are beginning to evaluate how to integrate these capabilities for members.



Business:

Generative AI is becoming a core business function. According to McKinsey’s 2025 survey, over 75% of companies use AI in at least one major business function, with marketing and customer service leading. Associations are mirroring this, using AI to personalize member communications, predict renewals, and optimize event marketing.



Environmental:

AI is now embedded in climate modeling and energy grid management, enabling more accurate extreme weather predictions. Municipalities are deploying AI to optimize waste collection and water usage. AI tools are offering replicable models for associations in sustainability-focused industries.

Expectations for AI are shifting. What was once “good enough to help” is now judged by how reliably it supports mission-critical decisions — and how ethically it operates under scrutiny.

For associations, these shifts matter deeply. It’s no longer enough to be ready — now the question is: How do you embed AI in a way that advances your mission, deepens member value, and strengthens trust?

What This Guide 2.0 Offers

Based on focus groups, partner interviews, AI prompts and outputs, and early-adopter feedback from associations themselves, AI Guide 2.0 goes beyond preparation. It helps you:

Understand

how to train staff and build confidence navigating the cultural shifts needed with measurements of mission and performance outcomes

Explore

real-world use cases and prompts tailored to association work

Design

oversight structures informed by content sensitivity

Tap into

partnership ecosystems that will enable AI integration and impact

Think of Guide 2.0 as a bridge: not to a “future AI” but to AI as a working tool today. The following chapters will guide you step by step, from ideation to implementation - always with an eye toward human judgment, ethics, and impact.

Let's Begin.



Chapter 1: Training and Cultural Shifts

Building AI Confidence: Training and Cultural Shift Essentials

Successfully adopting AI in your association requires both skill-building and culture change. Staff need to move from fear and uncertainty to confidence and experimentation. How do we get here? One way is through a practical roadmap for the transformation.

Understanding the Challenge

Most staff will fall into one of four groups when AI is introduced:

- A. The Skeptics who doubt it's worthwhile;
- B. The Anxious who worry about job security and making mistakes;
- C. The Curious who want to learn but need guidance, and;
- D. The Early Adopters already experimenting on their own.

Your goal is to move everyone toward confident, appropriate use of AI tools while maintaining necessary oversight.

The fundamental mindset shift needed is from viewing AI as a threat to seeing it as a colleague that handles routine work so humans can focus on strategy, relationships, and judgment. Staff must understand that AI augments their capabilities rather than replaces them, and that their expertise becomes more valuable when freed from administrative tasks.

The Four-Phase Approach

Phase 1: Foundation (Months 1-2)

Start by building awareness and addressing fears directly. Hold an all-staff overview explaining what AI is, how it will be used, and most importantly, that this is about making jobs easier, not eliminating them. During this foundation building, build in the time to have individual conversations with staff about their specific concerns. Also, form a group of AI champions who can support their peers. Be explicit about job security and emphasize that this is an investment in professional development. Bostrom's AI Council built a Teams Channel focused on AI, does monthly mini tech dives that are recorded and surveyed, and Friday Fun Challenges to encourage experimentation.

Phase 2: Exploration (Months 2-4)

The exploration stage is all about providing hands-on experience in low-risk environments. Offer department-specific training that shows staff how AI can help with their actual work. Create a "sandbox" where people can experiment safely without fear of mistakes. Hold weekly office hours where staff can ask questions and get help. Share early success stories to build momentum and show what's possible. Three years ago we had each marketing team member find an AI tool to experiment with and demo at our annual retreat. We ended up using [synthesia.ai](#) to produce tutorial videos such as basic information to log into the "Members Only" section on website, program information, etc. This one simple exercise conducted by our marketing team turned out to be a valuable tool for our largest client, all because of exploration!

Phase 3: Integration (Months 4-8)

Once the foundation is built and your team has some comfort in the usability of AI, begin embedding AI into daily workflows. Work with each department to redesign processes that incorporate AI tools. Provide advanced training on specific use cases. Create a peer mentoring program pairing power users with those still learning. Track usage and celebrate innovations. The goal is to make AI assistance a normal part of how work gets done.

Phase 4: Optimization (Months 8-12)

Now that your organization is fully integrated with AI, it is crucial that you can measure the impact and refine approaches. Some way to optimize use of AI is to calculate and report efficiency gains, recognize staff who find innovative applications, and share your transformation story with the broader association community. As you refine approaches, update policies based on lessons learned. By this point, staff should view AI as an essential tool they can't imagine working without.



Addressing the Five Common Fears

AI will continue to induce anxiety, fears, and ethical uses. Below are some of these common fears and ways to address them.

“AI will replace my job” Be direct: AI replaces tasks, not jobs. Show concrete examples of how roles evolve when AI handles routine work. A membership coordinator spends less time on data entry and more time on strategic outreach. An event planner spends less time on routine emails and more time on creative experience design. Make an explicit commitment to job security during the transition period and frame this as upskilling, not downsizing.

“I’ll make a costly mistake” Create psychological safety by having leaders share their own AI mistakes and lessons learned. Implement the sensitivity framework so staff know high-risk content has safety nets. Start everyone with low-sensitivity content only. Make it clear that good-faith experimentation errors are learning opportunities, not career risks. Provide checklists for what to verify before publishing AI-generated content.

“I’m not technical enough” Reframe the requirement: if you can write a clear email, you can write a good prompt. Using AI is about communication skills, not coding. Emphasize that you don’t need to understand how it works to use it effectively. Share success stories from non-technical staff. Provide fill-in-the-blank prompt templates to get people started. Normalize questions and confusion as part of learning.

“This will add to my workload” Show the math: a 30-minute training investment saves 2 hours per week on routine tasks. Start with the most time-consuming routine tasks to create immediate wins. Track and share time savings across the organization. Give staff protected time for learning without adding other work. Calculate ROI for common tasks to make the value concrete.

“I’ll become dependent and lose my skills” Clarify that AI is a tool that amplifies skills, not a replacement for expertise. Staff still need to know what good looks like to evaluate AI outputs. Their judgment becomes more important, not less. Compare it to using a calculator; it doesn’t make you forget math, it lets you work faster. Emphasize that editing and critical thinking skills become the core competencies.

Leadership’s Critical Role

As leaders within associations, we have a responsibility to educate and support our teams through the integration of AI into the daily work of the organization.

Executive Directors Must:

- Use AI publicly and share what you’re learning, including mistakes
- Provide dedicated budget for tools, training, and support
- Set clear expectations that AI becomes part of how the organization works
- Remove barriers quickly (access issues, unclear policies, resource constraints)
- Celebrate progress and share metrics showing positive impact

Managers Must:

- Have individual conversations with each team member about their concerns
- Identify quick wins specific to each person's actual work
- Provide coaching and support during the learning curve
- Redesign workflows collaboratively to incorporate AI tools
- Make it safe to ask questions and admit confusion

Board Members Must:

- Understand the AI strategy at a high level and approve the use policy
- Support investment in training and tools
- Ask about risk management and oversight, not micromanage tactics
- Receive quarterly updates on adoption and impact
- Avoid creating fear through excessive concern about risks

Measuring Success

In order to measure success, it is crucial that both adoption and impact are tracked. Early adoption indicators include training completion rates, prompt library contributions, office hours attendance, and active tool usage. Later indicators to measure impact include percentage using AI weekly, documented time savings, quality improvements, and staff confidence scores from surveys.

Measure cultural transformation through quarterly pulse surveys asking staff to rate their agreement with statements like: "I feel confident using AI tools," "AI makes my job easier," "I have the support I need to learn," "I feel safe experimenting," and "Leadership clearly supports AI adoption."

Calculate efficiency gains by tracking hours saved per week, tasks automated, projects completed faster, and reductions in backlog or overtime. Recognize that the real win isn't just time savings; it's that staff can focus on more strategic, meaningful work.

Finally, measure mission impact and KPIs that can be attributed to the efficiency and strategic brain power gained from using AI. This can be done through your normal data dashboards and tracking mechanisms or a new scorecard designed with AI data visualization tools. We've leveraged Monday.com's dashboard to produce our strategic plan scorecard that is reviewed weekly and updated monthly or quarterly depending on the metric.



The 30-Day Quick Start

Ready to get going? Here is a plan to get you started. Give every staff member a simple challenge to build confidence:

Week 1: Identify three routine tasks that feel repetitive or time-consuming

Week 2: Try using AI for at least one simple task daily (email drafting, list creation, brainstorming)

Week 3: Incorporate AI into your regular workflow for 2-3 tasks, practice iterative refinement

Week 4: Find one novel application no one else has tried yet and share it with your team

This low-pressure approach lets people learn at their own pace while building momentum across the organization.

Making It Stick Beyond Year One

Continue to embed AI literacy into organizational DNA to ensure this will be successful in the years to follow. Include Phase 1 training in new employee onboarding. Add “effectively leverages AI tools” to performance competencies. Keep the resource hub updated with new capabilities. Hold annual refresher training. Share innovations at staff meetings. Encourage conference attendance and speaking about your AI transformation.

Most importantly, maintain the culture of experimentation and sharing. The goal isn't to create AI experts; it's to build an organization where AI augmentation is a natural, valued part of how everyone works. When a new staff member joins a year from now, they should find AI use so integrated that it's just “how we do things here.”

Key Takeaway

Cultural transformation takes patience and persistent leadership, but the payoff is substantial. Organizations that successfully navigate this transition have reported not just efficiency gains but higher staff satisfaction, more strategic focus, and a culture of innovation. The key is addressing fears first, providing structured support, and celebrating progress along the way. Start small, build confidence through practice, and scale as competence grows.

You're not trying to make everyone an AI expert. You're building a team that knows when and how to use AI appropriately, maintains necessary human oversight, and leverages these tools to do more meaningful, impactful work.

Chapter 2: Use Cases & Common Prompts

Artificial intelligence is only valuable when it solves real problems. For associations, that means supporting the daily work of governance, membership, finance, events, education, and marketing in ways that enhance efficiency and member value. This chapter translates AI from concept to practice by mapping it to the core functions of association management. Each section highlights common use cases, offers sample prompts you can adapt immediately, and flags the level of human oversight needed to ensure outputs are accurate and trustworthy. Think of this chapter as a practical toolkit: a starting point for staff to explore AI in their own workflows, with guidance that keeps mission, integrity, and member trust at the center.



Governance

Strong governance is about clarity, accountability, and informed decision-making. It is also essential for an association's overarching success and longevity. AI can reduce administrative burden by drafting, summarizing, and contextualizing governance materials, freeing leaders to focus on strategy.

Common Use Cases

- Drafting board meeting agendas and minutes
- Summarizing complex board packets
- Comparing bylaws or policy language across versions
- Creating risk dashboards from raw reports
- Generating "what if" policy or budget scenarios



Sample Prompts

Board Support

- *“Draft a board orientation checklist that ensures new directors understand their fiduciary duties, conflict of interest obligations, and governance responsibilities.”*
- *“Generate meeting minutes template sections that capture required elements for corporate compliance: attendance, quorum, motions, votes, and key discussions.”*
- *“Create a document retention policy schedule listing different document types (financial, governance, member records) with recommended retention periods and disposal methods.”*
- *“Summarize this 20-page board packet into a 2-page executive brief highlighting key risks and decisions.”*
- *“Draft a first-cut board agenda based on these three strategic priorities and last month’s action items.”*
- *“Create a board meeting agenda template for our quarterly meeting that includes standard sections for governance, finance, strategic initiatives, and member updates.”*
- *“Draft a one-page executive briefing on our membership growth trends for the past year. Include key metrics: total members, growth rate, retention rate, and demographic shifts. Write it for board members who need quick insights.”*
- *“Summarize these committee reports into a 2-3 sentence brief for each committee: [paste committee reports]. Highlight any items requiring board action.”*
- *“Generate a list of discussion questions for our board to consider regarding our new strategic priority around diversity and inclusion.”*
- *“Create a consent agenda format that groups routine items efficiently while ensuring proper documentation and approval processes.”*
- *“Draft an action item tracker template that captures decisions made, responsible parties, deadlines, and status updates from our board meetings.”*

Policies, Procedures, & Bylaws

- *“Compare these two versions of bylaws and highlight any changes in voting rights.”*
- *“Draft a conflict of interest policy for our professional association’s board of directors. Include disclosure requirements, recusal procedures, and annual attestation processes.”*
- *“Review this existing social media policy and suggest updates to address current platform trends, AI-generated content, and member conduct expectations: [paste policy].”*
- *“Create a policy framework for our association’s position statement development process, including who can propose positions, approval workflows, and sunset review requirements.”*
- *“Generate a checklist for reviewing and updating association policies, including recommended review frequencies for different policy types.”*
- *“Draft a data privacy policy that addresses member information collection, storage, usage, and rights under GDPR and similar regulations.”*
- *“Explain this bylaws section in plain language for our members: [paste bylaw text]. Focus on what it means practically for member rights and responsibilities.”*

- *“Draft a bylaws amendment to change our board size from 12 to 15 members. Include the specific article and section number format, rationale statement, and implementation timeline.”*
- *“Create a comparison table showing our current bylaws language versus proposed changes for [specific topic], with a column explaining the reason for each change.”*
- *“Generate a list of bylaws sections that typically need review when an association transitions from all-volunteer to having paid staff.”*
- *“Draft bylaws language that establishes a new member category for [type of member], including eligibility criteria, rights, and dues structure.”*

Strategic Planning

- *“Create a SWOT analysis template specifically designed for a professional association in the [industry/field]. Include prompting questions under each category to stimulate board discussion.”*
- *“Generate 5-7 strategic goal examples for an association focused on advancing [profession/industry], with each goal following SMART criteria.”*
- *“Draft a stakeholder analysis framework to identify key groups our association should consider in strategic planning: members, partners, sponsors, regulators, and the public.”*
- *“Create a scenario planning template that helps our board explore ‘what-if’ situations for the next 3-5 years in our industry.”*
- *“Develop a strategic plan outline with sections for mission/vision, environmental scan, strategic priorities, goals, tactics, and metrics.”*

Oversight Guidance

Governance documents often contain highly sensitive content. Always require full oversight by senior staff and legal counsel before sharing.

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Finance & Accounting

AI can accelerate financial reporting, narrative drafting, and anomaly detection. Staff gain more time for strategic analysis rather than repetitive tasks.

Common Use Cases

- Drafting plain-language budget narratives
- Summarizing monthly or quarterly financials
- Identifying anomalies or unusual transactions
- Reviewing vendor contracts for key terms
- Automating invoice categorization



Sample Prompts

Budget Narrative Development

- *“Write a budget narrative for our annual conference line item, which increased from \$250,000 to \$320,000. Explain the drivers: venue costs up 15%, attendance growth projections of 20%, and enhanced technology needs.”*
- *“Create an executive summary of our annual budget that explains total revenue of \$2.5M and expenses of \$2.4M in terms non-financial board members can easily understand.”*
- *“Draft a variance explanation for our membership dues line, which is running 12% below budget at mid-year. Propose corrective actions and revised forecast.”*
- *“Generate a narrative explaining our reserve policy to members: why we maintain 6 months operating reserves, how we invest them, and what circumstances would trigger their use.”*
- *“Write a budget assumptions document that outlines inflation rates, membership growth projections, salary increase percentages, and other planning factors used in creating next year’s budget.”*
- *“Summarize this month’s budget variance report in 300 words for non-financial staff.”*
- *“Highlight unusual transactions from this expense file that may require manual review.”*
- *“Draft a budget narrative for the board packet that explains increased travel expenses.”*

Financial Report Summaries

- *“Summarize these quarterly financial statements in a one-page dashboard format with key metrics: total revenue vs. budget, expense ratio, net income, and cash position: [paste financials].”*
- *“Create a visual financial health scorecard showing 5-6 key indicators (revenue growth, membership dues trend, program profitability, reserve ratio) with status indicators (green/yellow/red).”*
- *“Write a member-friendly explanation of where their dues dollars go. Break down a \$250 membership fee into program areas: education 30%, advocacy 25%, member services 20%, operations 25%.”*
- *“Generate talking points for the treasurer to present the annual financial statements to the membership at the annual meeting. Focus on achievements, challenges, and outlook.”*
- *“Create a comparison analysis showing our association’s financial performance over the past three years, highlighting trends in revenue diversification and expense management.”*

Audit Preparation

- *“Create a comprehensive audit preparation checklist including all financial documents, supporting schedules, board minutes, contracts, and policies auditors typically request.”*
- *“Draft a memo to staff explaining the audit process, timeline, and their roles in providing information to auditors. Include tips for organizing supporting documentation.”*
- *“Generate a list of typical auditor questions about internal controls, segregation of duties, and financial procedures, with draft responses based on our association’s practices.”*

- *“Create a template for documenting significant accounting estimates and judgments (like accounts receivable reserves or prepaid dues allocation) that auditors will review.”*
- *“Develop an audit findings tracker that records management letter comments, planned responses, responsible staff, and implementation deadlines.”*

Revenue Forecasting

- *“Create a membership revenue forecast model for the next fiscal year. Current members: 5,200, historical retention rate: 88%, expected new member growth: 8%, average dues: \$285.”*
- *“Generate scenarios (optimistic, realistic, pessimistic) for our annual conference revenue based on attendance projections of 800, 650, and 500 attendees respectively.”*
- *“Build a multi-year revenue projection (3 years) showing the impact of launching a new certification program. Assume slow year 1 adoption, growth in year 2, and maturity in year 3.”*
- *“Create a sponsorship revenue forecast based on our current sponsor levels (Platinum: \$25K, Gold: \$15K, Silver: \$7.5K) and historical conversion rates derived from sponsor prospecting efforts.”*
- *“Develop a publication revenue model that factors in advertising sales, subscription fees, and declining print trends offset by digital growth.”*

Grant Proposal Financial Sections

- *“Write a grant budget narrative for a \$50,000 workforce development program. Break down: program staff time (50%), materials and resources (20%), marketing (10%), technology (10%), indirect costs (10%).”*
- *“Create a budget justification for requesting salary support for a project director at \$75,000 plus benefits. Explain the role, time allocation, and why this position is essential to project success.”*
- *“Draft a sustainability plan narrative explaining how our association will continue funding this program after grant funding ends in three years.”*
- *“Generate a cost-sharing and matching funds section showing our association’s commitment: in-kind staff time valued at \$30,000 and direct cost-sharing of \$15,000.”*
- *“Write a financial capacity statement demonstrating our association’s financial health and ability to manage grant funds responsibly. Include annual budget size, reserves, and audit history.”*

Oversight Guidance

Financial data is very sensitive. Outputs should undergo finance team and leadership review. Never upload raw financial records to public AI platforms.



Sales & Marketing

From campaigns to sponsorships, marketing is where AI shines — generating copy, testing messages, and optimizing digital outreach.

Common Use Cases

- Writing event promotion copy
- Creating A/B test subject lines
- Optimizing SEO and keywords
- Drafting sponsorship proposals
- Generating social media campaigns

Sample Prompts

Member Segmentation and Campaign Messaging

- *“Generate 5 subject lines for an email campaign inviting young professionals to join a webinar.”*
- *“Create three distinct value propositions for our association targeted at: early-career professionals (0-5 years), mid-career managers (6-15 years), and senior executives (15+ years).”*
- *“Draft email subject lines and preview text for a membership renewal campaign targeting members who have been with us 10+ years. Emphasize loyalty, community, and continued value.”*
- *“Generate messaging for recruiting members from our newest professional demographic: [specific segment]. Address their unique challenges, career stage, and what differentiates our association.”*
- *“Create a comparison chart for prospective members showing our association’s benefits versus not joining and versus joining competing organizations.”*
- *“Write social media ad copy (3 variations) targeting non-members in [industry/profession]. Each should be 125 characters or less with a clear call-to-action.”*

Content Marketing Calendar

- *“Create a 3-month content calendar for our association’s blog, social media, email newsletter, and podcast. Include topics aligned with our strategic priorities and seasonal industry trends.”*
- *“Generate 20 blog post topic ideas focused on professional development, industry trends, and member success stories relevant to [profession/industry].”*
- *“Design a monthly email cadence that balances promotional content (events, programs), educational content (tips, resources), and community content (member spotlights, networking).”*
- *“Create a content theme framework organizing our annual content into quarterly themes that align with our members’ business cycles and professional development needs.”*
- *“Develop a social media posting schedule for LinkedIn, Twitter, and Facebook that maximizes engagement. Include recommended posting times, content types, and frequency for each platform.”*

Campaign Development

- *“Write a 5-email welcome sequence for new members that introduces them to key benefits, resources, and community over their first 60 days.”*
- *“Create an event promotion email series (save-the-date, early bird, last chance) for our annual conference. Include compelling subject lines and calls-to-action for each.”*
- *“Draft three versions of a membership renewal email for lapsed members: one empathetic, one emphasizing networking benefits, and one offering a discount.”*
- *“Create a 4-part onboarding email series for new members of a healthcare association, highlighting resources, events, and networking opportunities.”*
- *“Draft a re-engagement email campaign (3 emails) targeting members who haven’t logged into our member portal or attended events in 12+ months.”*
- *“Generate an educational email series (6 emails) that positions our association as a thought leader on [specific industry topic]. Each email should provide actionable insights.”*
- *“Write a fundraising email sequence for our association’s foundation or scholarship fund, including storytelling elements, impact statistics, and clear giving options.”*
- *“Draft 3 LinkedIn posts promoting our annual conference, tailored for CEOs.”*
- *“Draft 3 variations of an event reminder email — one formal, one friendly, one urgent.”*

Sponsorship and Partnership Materials

- *“Summarize this sponsor prospectus into a one-page benefits sheet.”*
- *“Design a tiered sponsorship package structure for our annual conference with 4 levels (\$25K, \$15K, \$10K, \$5K). Include specific benefits, visibility opportunities, and access for each tier.”*
- *“Write a sponsorship prospectus introduction that explains our association’s reach, member demographics, and value proposition to potential corporate partners.”*
- *“Create a one-page partnership proposal template for approaching potential sponsors. Include sections for opportunity overview, audience data, benefits, investment, and next steps.”*
- *“Generate ROI talking points for sponsors showing the value they receive: impressions, engagement opportunities, lead generation potential, and brand alignment with industry leaders.”*
- *“Draft a post-event sponsorship fulfillment report template that demonstrates delivered value: attendance reached, social media impressions, booth traffic, and leads generated.”*

Brand Voice and Messaging

- *“Develop brand voice guidelines for our association describing our tone (professional yet approachable), language preferences (inclusive, action-oriented), and what to avoid.”*
- *“Create an elevator pitch (30 seconds) and expanded version (2 minutes) explaining what our association does, who we serve, and why we matter.”*
- *“Generate a messaging framework with three main pillars (e.g., ‘Advance the Profession,’ ‘Connect the Community,’ ‘Champion Excellence’) with supporting messages under each.”*
- *“Write boilerplate paragraphs (short 50 words, medium 100 words, long 200 words) about our association for use in press releases, proposals, and marketing materials.”*



- *“Create a glossary of preferred terms and phrases that reflect our brand values and positioning, including what language to use and what to avoid when describing our work.”*

Oversight Guidance

Marketing copy is **medium sensitivity**. Staff should ensure alignment with brand tone, updated data, and compliance (e.g., sponsorship benefits).



Membership Recruitment, Engagement & Retention

Membership is the lifeblood of every association. AI can help staff personalize communications at scale, anticipate renewal risks, and re-engage lapsed members.

Common Use Cases

- Personalized renewal reminders
- Onboarding journeys
- Engagement score analysis
- Win-back campaigns
- Community content recommendations

Sample Prompts

Member Journey Mapping

- *“Create a member journey map with five stages: Awareness, Consideration, Join, Engage, Renew. For each stage, identify key touchpoints, member needs, and our actions.”*
- *“Identify potential friction points in our current member journey where prospects or members might disengage: application process, onboarding, first 90 days, renewal.”*
- *“Generate a new member onboarding roadmap showing critical touchpoints in days 1, 7, 30, 60, and 90. What should members experience at each milestone?”*
- *“Map the emotional journey of a typical member throughout their membership lifecycle. When do they feel excited, confused, valued, or disconnected?”*
- *“Create a renewal journey strategy starting 90 days before expiration. What touchpoints, messages, and incentives should we deploy at 90, 60, 30, 14, and 7 days out?”*

Personalized Outreach Templates

- *“Write a personalized recruitment email template for prospects referred by current members. Include merge fields for referrer name, prospect name, and specific benefits relevant to their role.”*
- *“Create a birthday/membership anniversary email template that celebrates the member and reinforces the value they’ve received during their time with us.”*

- *“Draft a personalized event invitation email for members who haven’t attended an event in 18+ months. Address their absence gently and highlight low-barrier entry points.”*
- *“Generate a ‘we miss you’ email template for recently lapsed members (expired in last 90 days) offering a reconnection incentive and asking for feedback on why they didn’t renew.”*
- *“Write a thank you email template for members who volunteer, speak at events, or contribute content. Make it specific enough to personalize but efficient to deploy at scale.”*

Engagement Strategy Development

- *“Design a member engagement ladder showing how members can increase involvement from low-touch (reading newsletter) to high-touch (committee leadership). Include 7-10 steps.”*
- *“Create a peer mentoring program framework: program goals, participant matching criteria, time commitment, structure of meetings, and success metrics.”*
- *“Generate ideas for micro-engagement opportunities that take 5-15 minutes and can be done digitally: quick polls, discussion prompts, tip sharing, peer questions.”*
- *“Develop a member community activation plan for our online platform. How do we seed discussions, recognize contributors, and create a culture of sharing?”*
- *“Design a year-long member engagement campaign with monthly themes and activities that drive participation across different benefit areas: education, networking, advocacy, recognition.”*

Retention Analysis and Strategy

- *“Create a retention analysis framework examining: tenure segments (1st year, 2-3 years, 4-5 years, 6+ years), engagement levels, demographic factors, and benefit usage patterns.”*
- *“Generate a list of early warning indicators that a member is at risk of non-renewal: engagement drops, no portal logins, no event attendance, payment issues.”*
- *“Develop a first-year member retention strategy. What specific actions can we take to ensure new members see value quickly and engage meaningfully?”*
- *“Create a win-back campaign strategy for members who lapsed in the past 12 months. What messaging, offers, and timing will be most effective?”*
- *“Design a retention interview script for calling members who haven’t renewed. Include open-ended questions to understand their decision and assess if they can be saved.”*

Member Satisfaction and Feedback

- *“Create a comprehensive annual member satisfaction survey (15-20 questions) covering: overall satisfaction, benefit usage and value, communication preferences, and improvement suggestions.”*
- *“Generate a post-event survey (8-10 questions) that measures satisfaction, content relevance, logistics, and likelihood to attend future events.”*
- *“Write a brief pulse survey (3-5 questions) we can deploy quarterly to track member sentiment trends without survey fatigue.”*



- “Develop an exit survey for non-renewing members that respectfully asks why they’re leaving, what could have changed their decision, and whether they’d consider returning.”
- “Create a member advisory council framework: purpose, selection criteria, meeting cadence, discussion topics, and how we’ll implement their feedback.”

Oversight Guidance

Membership communications are **medium sensitivity**. Always review outputs for accuracy, tone, and policy alignment before sending.



Education & Credentialing

Education and credentialing are core association offerings. AI can scale program design, exam development, and personalized learning but accuracy, security, and fairness are paramount in these cases.

Common Use Cases

- Drafting exam questions with distractors
- Creating study guides or practice tests
- Summarizing CE session transcripts
- Designing adaptive learning paths
- Drafting speaker bios and course descriptions

Sample Prompts

Curriculum Development

- “Write 5 multiple-choice exam questions on cybersecurity best practices, with one correct answer and three distractors.”
- “Create a curriculum outline for a certificate program in [specialty area] consisting of 6 modules. Each module should have a title, learning objectives, topics covered, and estimated time.”
- “Generate learning objectives for a course on [specific topic] using Bloom’s Taxonomy. Include objectives at multiple cognitive levels: remembering, understanding, applying, analyzing.”
- “Design a competency framework for [profession/role] identifying 8-10 core competencies with definitions and proficiency levels (foundational, intermediate, advanced, expert).”
- “Develop a learning path for career progression from entry-level to senior practitioner, mapping recommended courses, experiences, and credentials at each stage.”
- “Create a course outline for a 90-minute webinar on [topic] including introduction, 3-4 main content sections with time allocations, activities, and conclusion with key takeaways.”

Assessment and Testing

- *“Generate 20 multiple-choice questions for a course on [topic]. Include the question, four answer options (one correct, three plausible distractors), correct answer, and brief explanation.”*
- *“Create 5 scenario-based assessment questions that test application of [concept/skill] in realistic professional situations. Include the scenario, question, and scoring rubric.”*
- *“Develop a performance-based assessment that requires candidates to demonstrate [specific competency]. Include task description, submission requirements, and evaluation criteria.”*
- *“Write assessment criteria and a scoring rubric for evaluating [type of work product, e.g., case study analysis, project plan]. Include 4-5 dimensions with performance level descriptions.”*
- *“Generate a pre-assessment and post-assessment pairing (10 questions each) that measures learning gains from a training program on [topic]. Ensure parallel structure for comparison.”*

Certification Program Design

- *“Design a certification program framework for [professional credential] including: eligibility requirements, content domains, exam format, recertification requirements, and timeline.”*
- *“Create a detailed exam blueprint showing content domains, subdomain topics, number of questions per area, and cognitive level distribution (recall, application, analysis).”*
- *“Develop eligibility pathways for certification that accommodate different educational backgrounds and experience levels while maintaining rigor.”*
- *“Generate a recertification/maintenance of certification policy outlining: cycle length, continuing education requirements, categories of acceptable activities, and documentation.”*
- *“Write a candidate handbook section explaining the exam format (e.g., 150 questions, 3.5 hours, computer-based, domains tested) and what to expect on exam day.”*

Continuing Education Management

- *“Create a continuing education (CE) credit policy explaining: what activities qualify, how credits are calculated, documentation requirements, and audit procedures.”*
- *“Design a CE activity approval form that captures: activity title, provider, date, hours, learning objectives, and how it relates to professional competency.”*
- *“Generate a communication plan for credential holders about CE requirements: reminder timeline (12, 6, 3, 1 months before deadline), resources, and FAQs.”*
- *“Develop guidelines for acceptable CE activities across categories: formal education, conferences, self-directed learning, teaching/presenting, publications, and professional service.”*
- *“Create a template for CE reporting year-end summaries showing credential holders their progress: credits earned by category, total credits, requirements met, and deficiencies.”*

Educational Content Creation

- *“Write a course description (150-200 words) for [course title] that explains what participants will learn, who should attend, prerequisite knowledge, and key takeaways.”*



- *“Create an outline for a white paper on [industry topic] intended as a resource for practitioners. Include executive summary, main sections, subsections, and conclusion.”*
- *“Generate discussion prompts and facilitation questions for an instructor-led training on [topic]. Include 3-4 questions per major concept to encourage participant engagement.”*
- *“Develop a case study for teaching [concept/skill]. Include background situation, stakeholder perspectives, data/information, key challenges, and discussion questions.”*
- *“Write learning reinforcement materials (job aid, checklist, quick reference guide) that participants can use back on the job to apply [skill/knowledge] from the training.”*
- *“Summarize this transcript into a 2-page CE course summary with 3 learning objectives.”*
- *“Draft a 150-word speaker bio from this LinkedIn profile.”*

Oversight Guidance

Because credentialing impacts professional standards, this area is **high sensitivity**. Always require subject matter experts (SMEs) and legal review before adoption.



Meetings & Events

AI can streamline event planning and delivery — from drafting session descriptions to summarizing sessions in real time.

Common Use Cases

- Drafting conference agendas and session blurbs
- Summarizing live event transcripts
- Generating attendee communications (pre- and post-event)
- Repackaging session content into blog posts or member takeaways
- Automating post-event surveys and feedback summaries

Sample Prompts

Event Planning and Logistics

- *“Create a comprehensive conference planning timeline starting 12 months out. Include milestones for venue selection, speaker recruitment, marketing launch, registration open, and final logistics.”*
- *“Generate a detailed event budget template with categories: venue and catering, audio-visual, speakers and entertainment, marketing and printing, staff and temporary help, contingency.”*
- *“Develop a request for proposal (RFP) template for conference venues including: event dates, expected attendance, room block needs, meeting space requirements, F&B needs, and AV requirements.”*

- *“Create a site visit checklist for evaluating potential event venues: meeting room capacity and setup, technology capabilities, accessibility, catering options, nearby accommodations.”*
- *“Design an event day operations plan showing hour-by-hour schedule, staff assignments, room setups, meals and breaks, AV needs, and vendor arrival times.”*

Program Development and Session Design

- *“Generate 15-20 conference session topic ideas for [industry/profession] that address current challenges, emerging trends, best practices, and professional development needs.”*
- *“Create a call for proposals (CFP) document for our annual conference explaining: theme, topic tracks, session formats, submission requirements, and selection criteria.”*
- *“Design session format options beyond standard presentations: panel discussions, workshops, roundtables, lightning talks, poster sessions. Include description, time needed, and ideal audience size.”*
- *“Develop a session evaluation rubric for reviewing proposals. Include criteria like: relevance to audience, speaker expertise, learning objectives, content originality, diversity of perspectives.”*
- *“Write a session description template that speakers complete including: title, track, format, description (100 words), learning objectives (3-4), target audience, and key takeaways.”*
- *“Turn this keynote transcript into a 500-word blog post.”*

Speaker Management

- *“Draft a speaker invitation email that conveys the prestige of presenting at our event, explains the opportunity (date, audience, topic), and makes the ask clear.”*
- *“Create a speaker confirmation kit including: acceptance confirmation, session details, timeline for slide submission, AV form, travel and accommodation info, and expectations.”*
- *“Generate a speaker preparation guide with tips on: knowing your audience, structuring presentations, designing effective slides, engaging participants, and time management.”*
- *“Write a speaker agreement/contract covering: presentation content ownership, recording permissions, slide deadline, attendance requirements, and code of conduct.”*
- *“Develop a speaker thank you and post-event communication template including: gratitude, session feedback/ratings, request for slides, and invitation to participate in future events.”*

Attendee Experience and Engagement

- *“Design a conference mobile app content strategy including: must-have features (schedule, maps, speakers), engagement tools (polls, Q&A, networking), and gamification elements.”*
- *“Create 8-10 networking activity ideas for conference breaks and receptions that go beyond generic mingling: structured speed networking, topic tables, mentor meetups, skill shares.”*
- *“Generate a first-time attendee orientation program that helps newcomers navigate the conference, meet people, and get the most value from their investment.”*
- *“Develop an attendee engagement campaign from pre-event (build excitement, encourage app download) through post-event (maintain connections, share resources).”*



- *“Design inclusive event experiences addressing: dietary restrictions, accessibility needs, quiet spaces, prayer/meditation rooms, pronouns and name badges, and varied social comfort levels.”*

Virtual and Hybrid Event Strategy

- *“Create a virtual event platform evaluation checklist considering: streaming quality, interactive features (chat, polls, Q&A), networking capabilities, analytics, and technical support.”*
- *“Design a hybrid event format that creates equitable experiences for in-person and virtual attendees. How do we ensure virtual participants aren't second-class attendees?”*
- *“Generate engagement tactics for virtual events to combat Zoom fatigue: session length guidelines, interactive elements, breakout rooms, energizers, and digital networking.”*
- *“Develop a technical requirements and best practices guide for virtual presenters covering: internet speed, camera setup, lighting, audio, background, and platform features.”*
- *“Create a virtual event marketing strategy that addresses unique barriers: emphasizing convenience, offering flexible registration (live vs. on-demand), and providing engagement previews.”*
- *“Summarize this webinar transcript into 5 key takeaways and 3 action steps for members who missed it.”*

Post-Event Follow-Up and Evaluation

- *“Write a post-event thank you email to attendees that expresses gratitude, provides access to session recordings and slides, and encourages continued engagement.”*
- *“Create a comprehensive event evaluation survey (15-20 questions) covering: overall satisfaction, session quality, logistics, networking opportunities, value for money, and suggestions.”*
- *“Generate an event success metrics report template including: registration and attendance data, session ratings, survey results, revenue analysis, and qualitative feedback themes.”*
- *“Develop a post-event content marketing plan: blog recaps, social media highlights, session recording release schedule, speaker interviews, and attendee testimonials.”*
- *“Design a lessons learned debrief framework for the planning team to capture: what worked well, what needs improvement, process efficiencies gained, and recommendations for next time.”*

Oversight Guidance

Events content is usually **medium sensitivity**. Review needed for brand voice, accuracy, and sponsor/member references. Always ensure approval from speakers prior to reuse.



Tips for Effective Prompting

Be Specific:

The more context you provide about your association, industry, and specific needs, the more tailored and useful the AI responses will be.

Iterate:

Use AI responses as starting points. Refine prompts based on initial outputs to get closer to your desired result.

Combine and Customize:

Mix elements from different AI responses to create content that perfectly fits your needs.

Add Your Voice:

Always review and edit AI-generated content to ensure it reflects your association's unique brand voice and values.

Provide Examples:

When possible, show the AI examples of your existing content to help it match your style and quality standards.

By mapping AI use cases to functional areas, staff can see immediate applications that align with their daily work. Pairing each use case with sample prompts lowers the barrier to experimentation, while the oversight guidance ensures outputs remain trustworthy and mission-aligned.



Chapter 3: AI Content Sensitivity and Oversight Framework

AI can supercharge association work, but only when it's paired with clear guardrails. The AI Content Sensitivity and Oversight Framework gives teams a simple, shared way to decide how much human review is required before any AI-assisted content is used. By classifying work products into four sensitivity levels (from routine logistics to board-level and legally consequential materials) and matching each level to specific approvers, documentation, and controls, associations can move faster without compromising accuracy, ethics, or trust. The goal isn't to slow down AI; it's to make it safe, consistent, and defensible.

Sensitivity Level Definitions

Level 4:
CRITICAL SENSITIVITY
Maximum Oversight

Content requiring executive/board review and legal consultation

Level 3:
HIGH SENSITIVITY
Strict Controls

Content requiring multiple reviewers and formal approval processes

Level 2:
MEDIUM SENSITIVITY
Enhanced Review

Content requiring subject matter expert review before use

Level 1:
LOW SENSITIVITY
Minimal Oversight

Content that carries minimal risk and can be generated with standard review

Quick Reference: Content Sensitivity Checklist

Content Type	Category	Sensitivity Level	Reviewers Required	Review Time
Bylaws & Amendments	Governance	Level 4	Legal + Board	2-4 weeks
Board Resolutions	Governance	Level 4	Legal + Board	1-2 weeks
Tax Filings (990)	Finance	Level 4	CPA + Board	2-4 weeks
Audited Financials	Finance	Level 4	CPA + Committee	2-3 weeks
Crisis Communications	Marketing	Level 4	Legal + ED + Board	1-7 days
Brand Repositioning	Marketing	Level 4	ED + Board	2-3 weeks
Member Expulsions	Membership	Level 4	Legal + ED + Board	2-4 weeks
Data Breach Notice	Membership	Level 4	Legal + ED	1-3 days
Certification Standards	Education	Level 4	Legal + Commission	2-4 weeks
Exam Content (Live)	Education	Level 4	Psychometrician + Commission	2-3 weeks
Credential Revocation	Education	Level 4	Legal + Commission	2-3 weeks
Event Crisis Response	Events	Level 4	Legal + ED + Risk Mgr	Immediate-3 days
Venue Contracts	Events	Level 4	Legal + ED	1-2 weeks
Incident Reports	Events	Level 4	Legal + ED	1-7 days
Policy Statements	Governance	Level 3	ED + Committee	1 week
Board Meeting Minutes	Governance	Level 3	ED + Board Chair	3-5 days
Annual Budget	Finance	Level 3	CFO + ED	1 week
Financial Policies	Finance	Level 3	CFO + ED	1 week
Sponsorship Agreements	Marketing	Level 3	Director + ED	1 week
Press Releases	Marketing	Level 3	Director + ED	3-5 days
Eligibility Changes	Membership	Level 3	Director + ED	1 week



Content Type	Category	Sensitivity Level	Reviewers Required	Review Time
Complaint Responses	Membership	Level 3	Director + ED	3-5 days
Curriculum Standards	Education	Level 3	Director + SMEs	1 week
CE Policies	Education	Level 3	Director + Committee	1 week
Speaker Contracts	Events	Level 3	Director + ED	1 week
Code of Conduct	Events	Level 3	Director + ED	1 week
Board Agendas	Governance	Level 2	ED + Staff	1-2 days
Monthly Reports	Finance	Level 2	Finance Staff + Manager	1-3 days
Email Campaigns	Marketing	Level 2	Manager + SME	1-2 days
Renewal Campaigns	Membership	Level 2	Manager + Director	1-3 days
Course Descriptions	Education	Level 2	Manager + SME	1-3 days
Event Marketing	Events	Level 2	Manager + Director	1-3 days
Meeting Logistics	Governance	Level 1	Staff	Same day
Budget Templates	Finance	Level 1	Finance Staff	Same day
Social Media Posts	Marketing	Level 1	Marketing Staff	Same day
Welcome Emails	Membership	Level 1	Staff	Same day
Registration Emails	Education	Level 1	Staff	Same day
Registration Confirmations	Events	Level 1	Staff	Same day

Level 4 Content (Critical Sensitivity)

- Approvers: Executive director + legal counsel + board chair/relevant board committee
- Review Time: 1-4 weeks depending on urgency
- Documentation: Board minutes or formal resolution, legal sign-off, comprehensive audit trail

Level 3 Content (High Sensitivity)

- Approvers: Department director + executive director + relevant committee/experts
- Review Time: 3-7 business days
- Documentation: Formal approval in writing, version control, decision rationale

Level 2 Content (Medium Sensitivity)

- Approver: Department manager + relevant subject matter expert
- Review Time: 1-3 business days
- Documentation: Email approval or notation in project files

Level 1 Content (Low Sensitivity)

- Approver: Staff member who requested AI assistance
- Review Time: Immediate to same day
- Documentation: None required beyond normal workflows

Special Considerations for AI-Generated Content

All AI-Generated Content Should Include:

1. **Human Review Requirement:** No AI content should be published without human verification
2. **Fact-Checking:** Verification of all claims, statistics, and references
3. **Source Attribution:** Proper citation when AI draws from specific sources
4. **Bias Review:** Assessment for unintended bias or exclusionary language
5. **Brand Alignment:** Consistency with association values and voice
6. **Accuracy Verification:** Subject matter expert confirmation for technical content

Additional Protections for High/Critical Sensitivity:

- **Multiple Reviewers:** Require at least two independent reviews
- **Red Team Review:** Assign someone to actively look for problems/risks
- **Legal Holds:** Do not publish until legal clearance obtained
- **Board Notification:** Keep board informed of AI use in critical decisions
- **Audit Trail:** Document AI's role, prompts used, and human modifications
- **Cooling-Off Period:** Implement mandatory waiting period before publication

Implementation Checklist

Establishing Your AI Oversight Program

- Designate an AI Governance Lead responsible for oversight framework
- Create a cross-functional AI review committee with representation from all departments
- Develop written AI use policy defining allowed uses, prohibited uses, and oversight requirements
- Train all staff on sensitivity levels and review requirements
- Implement AI disclosure practices (when/how to disclose AI assistance)
- Create approval workflow tools (forms, tracking systems)
- Establish review for Service Level Agreements (SLAs) for each sensitivity level
- Build audit capabilities to spot-check AI content compliance
- Schedule regular policy reviews (quarterly or biannually)
- Create escalation procedures when sensitivity level is unclear
- Document lessons learned from AI content issues or near-misses
- Review insurance coverage for AI-related risks



Decision Tree: “What Sensitivity Level Is This?”

Ask these questions in order:

1. Does this involve legal obligations, regulatory compliance, or potential litigation?

YES → Minimum Level 3, likely Level 4

Level 4:
CRITICAL SENSITIVITY
Maximum Oversight

Level 3:
HIGH SENSITIVITY
Strict Controls

2. Does this commit the association to financial obligations threshold?

YES → Minimum Level 3

Level 3:
HIGH SENSITIVITY
Strict Controls

3. Does this change member rights, benefits, or eligibility?

YES → Minimum Level 3

Level 3:
HIGH SENSITIVITY
Strict Controls

4. Does this name specific individuals or contain sensitive personal information?

YES → Minimum Level 3

Level 3:
HIGH SENSITIVITY
Strict Controls

5. Could this content significantly harm the association’s reputation if incorrect?

YES → Minimum Level 3

Level 2:
MEDIUM SENSITIVITY
Enhanced Review

6. Does this require subject matter expertise to verify accuracy?

YES → Minimum Level 2

Level 2:
MEDIUM SENSITIVITY
Enhanced Review

7. Is this visible to external audiences (members, public, media)?

YES → Minimum Level 2

Level 2:
MEDIUM SENSITIVITY
Enhanced Review

8. Is this routine internal administrative content?

YES → Level 1

Level 1:
LOW SENSITIVITY
Minimal Oversight



When in doubt, escalate to the next higher level.

Red Flags: Content That Should Never Be Solely AI-Generated

- ✘ Legal opinions or advice
- ✘ Medical or clinical advice
- ✘ Exam questions (either final or draft) for high-stakes assessments
- ✘ Credential eligibility determinations
- ✘ Member discipline decisions
- ✘ Financial audit opinions
- ✘ Tax return preparation
- ✘ Board votes or resolutions
- ✘ Employment termination notices
- ✘ Crisis communications (initial drafts only, never final)
- ✘ Contract terms and conditions
- ✘ Insurance claims
- ✘ Research data analysis (statistics, findings)
- ✘ Whistleblower investigations

These areas require human professional judgment and cannot be delegated to AI.

How an association could use this framework

1. Embed the levels in workflows: Add the Level 1–4 labels to project templates, intake forms, and content briefs so staff select a sensitivity level up front.
2. Route for the right reviews: Tie each level to pre-set approvers (e.g., manager → director → executive/legal/board) and SLAs; automate routing in your task or ticketing system.
3. Apply the decision tree: When the level is unclear, use the chapter’s questions to escalate; “when in doubt, go higher.”
4. Log AI involvement: Capture prompts, sources, and human edits for Level 2–4 items to maintain an audit trail.
5. Train and reinforce: Include the checklist and a red-flag list in onboarding and refresher trainings; run spot checks each quarter.
6. Evolve with risk: Review exceptions, incidents, and near-misses, then update thresholds, approvers, and examples at least annually.

RESULTS: Staff know when AI drafts are fine with a quick check and when formal, multi-party oversight is mandatory.

This framework should be adapted to your association’s specific risk tolerance, organizational structure, and industry context. Review and update annually or when significant changes occur.



Chapter 4: Partnership Ecosystems

Associations don't need to build AI capabilities from scratch. A robust ecosystem of technology partners exists; but the right combination depends entirely on your organization's unique needs, existing systems, culture, and goals. This chapter helps you think strategically about building an AI partnership approach that works for your association.

The Strategic Question: Build, Buy, or Partner?

Before evaluating any specific tools, consider your approach:

Build

Develop custom AI solutions internally or through contracted developers

- Best for: Unique workflows, sensitive data, highly specific needs
- Requires: Technical expertise, ongoing maintenance, significant budget

Buy

Purchase enterprise AI platforms or tools

- Best for: Proven use cases, integration with existing systems, scalable needs
- Requires: Budget for licensing, training investment, change management

Partner

Work with AI-enabled service providers or consultants

- Best for: Expertise gaps, strategic guidance, implementation support
- Requires: Trust in external partners, clear scope definition

Most associations use a **hybrid approach**: general-purpose AI tools for common tasks, specialized partners for strategic initiatives, and selective custom development for unique needs.

Understanding the AI Partnership Landscape

The AI ecosystem for associations can be divided into three tiers:

Foundation Layer: General-Purpose AI Platforms These are powerful, versatile AI systems that handle a wide range of tasks from content creation to analysis. They're not association-specific but provide the core AI capabilities many organizations need.

Integration Layer: Association Management Systems with AI Traditional AMS platforms are integrating AI features into their existing solutions, bringing intelligence to membership management, community engagement, and operations without requiring separate tools.

Specialization Layer: Association-Focused AI Solutions Companies building AI solutions specifically for the unique needs of professional societies, trade associations, and membership organizations, with deep understanding of the sector's workflows and challenges.

Building Your AI Partnership Strategy

Assessment Questions

Before selecting partners, answer these strategic questions:

- 1. What are your priority use cases?** Start with 2-3 high-impact areas rather than trying to do everything at once. Focus on where AI can deliver quick wins or solve persistent pain points.
 - 2. What's your current technology stack?** Choose AI tools that integrate well with systems you already use. Native integration reduces friction and increases adoption.
 - 3. What's your technical capacity?** Be realistic about your IT resources. Some solutions require technical expertise; others are designed for non-technical users.
 - 4. What's your budget?** AI tools range from free to enterprise pricing. Many associations find success starting with lower-cost options and scaling up.
 - 5. What are your data privacy and security requirements?** Understand where your data goes, how it's used, and what compliance guarantees vendors provide, especially for member data.
 - 6. What's your change management capacity?** Technology adoption depends on people. Consider your organization's readiness for change and support needed.
-



Common Pitfalls to Avoid

Shiny Object Syndrome New AI tools launch constantly. Resist the urge to try everything. Focus on solving specific problems rather than experimenting with technology for its own sake.

Underestimating Change Management Technology is rarely the constraint; people and processes are. Budget significant time and resources for training, communication, and cultural shifts.

Ignoring Integration Tools that don't connect to your existing systems create data silos and duplicate work. Prioritize solutions that integrate with what you already use.

Skipping Governance Review Chapter 3's sensitivity framework before deploying AI tools. Establish clear policies about what AI can and cannot do, who reviews outputs, and how you'll handle mistakes.

Going It Alone Connect with peer associations, attend industry events (like Sidecar Summit), and learn from others' successes and failures. The association community is generous with insights.

Vendor Lock-In When possible, maintain flexibility. Annual contracts, data export capabilities, and avoiding proprietary formats give you options if needs change or better solutions emerge.

The Future of Association Technology Partnerships

The AI landscape is evolving rapidly. Here's what to watch:

Consolidation: Expect more AMS platforms to build or acquire AI capabilities rather than relying on integrations.

Specialization: More association-specific AI solutions will emerge as vendors recognize the unique needs of the sector and the market opportunity.

Democratization: AI tools will become more accessible to smaller associations as prices decrease and no-code solutions proliferate.

Standardization: Industry standards for AI integration and data exchange will emerge, making it easier to combine tools from different vendors.

Regulation: Expect more attention to AI governance, data privacy, and compliance requirements, particularly for associations operating internationally.

Conclusion: Building Your AI Partnership Portfolio

No single AI partner will meet all your association's needs. The most successful associations build a portfolio of partnerships that balance general-purpose capabilities with specialized tools, foundational platforms with innovative solutions, and enterprise stability with startup agility.

Start with clarity on your priorities, be realistic about your capacity, and maintain flexibility to evolve as both your needs and the technology landscape change. The partnerships you build today should enable your association to deliver more value to members, operate more efficiently, and remain competitive in an increasingly AI-enhanced world.

The ecosystem is rich with options and more emerge regularly. Stay connected to the association community through platforms like Sidecar, attend industry events, and learn from peers who are on similar journeys. The transformation is just beginning, and the associations that thoughtfully build their AI partnership strategies now will be best positioned for the future.

Additional Resources

For Ongoing Education:

- Sidecar Annual Summit and webinars (sidecar.ai)
- ASAE Technology Conference
- Coursera university partnered online learning

For Market Intelligence:

- Capterra and G2 for user reviews of association software
- Association Adviser newsletter
- Blue Cypress insights and research

For Community:

- Sidecar AI community for association professionals
- Higher Logic User Community
- Association technology LinkedIn groups
- Local ASAE chapter technology committees

A large graphic featuring the letters 'AI' in a bold, white, sans-serif font. Below 'AI' is the text 'ARTIFICIAL INTELLIGENCE' in a smaller, white, sans-serif font. The background is a dark purple with a complex, wavy pattern of thin, light purple lines that resemble a topographical map or a neural network. Scattered throughout are small, light purple dots. Surrounding the 'AI' text are several industry labels in a light purple, sans-serif font: 'Education' (top), 'Business' (left), 'Healthcare' (left), 'Entertainment' (bottom), 'Transportation' (top right), 'Administration' (right), and 'Environment' (bottom right).

AI

ARTIFICIAL INTELLIGENCE

In Closing

AI is transforming how associations work, lead, and serve their members but technology alone isn't enough. Success requires clear oversight, intentional training, cultural readiness, and the courage to learn by providing a safe space for experimentation. At Bostrom, we've been building a culture of innovation and Agile Association Management™ practices to meet this moment, blending curiosity with discipline so AI strengthens strategy rather than distracts from it. We hope this guide has given you both inspiration and practical tools to advance your own journey. And if you're looking for a partner to help you translate these ideas into action, Bostrom is here to support you every step of the way.



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