



The Trade Association Leader's AI Playbook

Your guide to safe, governed, productive
AI adoption for trade and industry associations

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CHAPTER 01

Executive Summary

What You'll Learn

- ▢ Why the gap between association scope and staff makes AI uniquely valuable here
- ▢ The state privacy law pressure stacking up on associations that handle member PII
- ▢ How Shadow AI exposes member contact, dues, committee, and advocacy data
- ▢ The conservative productivity math: \$110,000+ recovered per year from a single use case
- ▢ How Managed Framework AI moves your association from unmanaged AI to a governed program

Trade and industry associations face a workload that doesn't match the headcount.

A typical association serves hundreds or thousands of member companies, tracks legislation across dozens of states and federal agencies, publishes a steady stream of industry content, runs conferences and webinars, manages advocacy campaigns, and keeps an engaged board operating in sync, all with a staff that would look small against a single mid-market company in the industries it serves.

That gap between scope and staff is where AI fits. And it fits better here than almost anywhere.

The workload pressure is real. According to research from Member Lounge, worker access to AI tools jumped 50% in 2025. Your staff are already using AI on their own, to draft newsletters faster, to summarize legislative text, to generate social posts. They're doing it with consumer tools nobody approved, and 76% of associations have no formal AI policy to draw the line. The tools are running. The governance is not.

That creates 2 simultaneous problems. The first is exposure: member contact lists, dues payment histories, committee records, and policy positions are being pasted into free chatbots with no data protection guarantees, no audit trail, and no organizational visibility. The second is missed opportunity: uncoordinated, individual AI use produces inconsistent results and fails to capture the compounding productivity gains that come from governed, organization-wide adoption.

The staffing math makes this urgent. If AI saves each of your 15 team members 30 minutes per day on content drafting, legislative research, and member communications, that's 7.5 hours recovered every day. At a blended rate of \$60 per hour, that's \$450 per day, more than \$110,000 per year, from a single use case applied consistently. Multiply that across content production, event management, advocacy drafting, and member engagement workflows. The numbers get serious fast.

The compliance pressure adds another layer. As of 2026, more than 20 U.S. states have enacted comprehensive data privacy laws. The California Consumer Privacy Act (CCPA) now requires organizations to conduct formal privacy risk assessments before deploying AI tools that process member data. Colorado's AI Act takes effect in June 2026. Violations carry civil penalties of up to \$7,500 per intentional incident. Associations that handle member personally identifiable information (PII), and every association does, are squarely in scope.

Framework IT has spent more than 16 years managing technology for small and midsize organizations. We built Managed Framework AI because we saw the same pattern repeat: organizations that knew AI mattered but didn't have a clear, safe path to adoption. This playbook gives you that path.

This playbook gives you the starting point. Managed Framework AI gives you the partner to execute it.

CHAPTER 02

About the Author

Adam Barney

President and Managing Partner, Framework IT



Adam Barney is President and Managing Partner of Framework IT, a premier managed IT and telecommunications firm based in Chicago. He holds a Bachelor of Science in Finance and Business Administration from the University of Illinois Urbana-Champaign, where he graduated Summa Cum Laude. With more than 15 years of executive experience in managed services and telecommunications, Adam leads with a core philosophy that technology should be user-friendly and approachable, empowering businesses to thrive in their respective industries.

Since assuming the presidency in April 2022, Adam has led a team of over 40 professionals spanning sales, information technology, operations, marketing, human resources, and fulfillment. Under his leadership, Framework IT remains committed to its inverted-pyramid approach, which ensures clients' needs and aspirations are always the company's top priority.

"Clients' needs and aspirations are always the company's top priority."

Founded in 2008, Framework IT specializes in IT support, strategy, and cybersecurity for small and mid-sized businesses nationwide. The company's 30+ engineers act as an extension of client businesses, proactively preventing IT issues so teams have more time to focus on what truly matters. During his career, Adam has consulted over 1,000 companies, helping them transform their technology infrastructure.

In recent years, Adam has spearheaded the adoption of artificial intelligence in Framework IT's internal operations and service delivery, positioning the company at the forefront of AI-driven IT management. He has pioneered the launch of Managed Framework AI to help clients implement AI and AI-based automation in their own businesses, enabling organizations to unlock new levels of efficiency and competitive advantage. Adam is also a founding member of The Forge AI Alliance of MSPs, an alliance of managed service providers working to accelerate the adoption of AI and automation in their own companies and those of their clients.

Under Adam's leadership, Framework IT earned a spot on the Inc. 500 Fastest Growing Private Companies in America twice and the Inc. 5000 list at least 5 times over the past decade. The company ranked as one of the Best and Brightest Places to Work in Chicago for 5 consecutive years and one of the Best and Brightest Places to Work in the Nation twice in the last 5 years. Framework IT has maintained a BBB complaint-free record since 2008.

Adam's expertise has positioned him as a sought-after voice in managed services and business technology, as a speaker and panelist at industry events. His insights have appeared in the Harvard Business Review, the Washington Post, and Fox 32 Chicago.

CHAPTER 03

AI Is Here. The Question Is How You Use It.

What Is AI, Really?

Strip away the hype and AI is a category of software that can process language, recognize patterns, generate content, and make decisions based on data. The most visible form of AI today is the Large Language Model (LLM), the technology behind tools like ChatGPT, Claude, and Gemini. These models were trained on massive amounts of text and can understand context, follow instructions, and produce human-quality writing, analysis, and code.

But AI goes well beyond a chatbot. Modern AI platforms combine multiple capabilities into a single environment:

- **Conversational AI (Chat).** Ask questions, draft documents, summarize reports, brainstorm ideas, analyze data, and get research-backed answers in seconds. This is where most association teams start, and it delivers immediate value on day one.
- **Workflow automation.** Connect AI to your existing tools (your association management system (AMS), email platform, event software, file storage) and build automated processes that run on their own. No coding required. A visual, drag-and-drop builder lets anyone design multi-step automations.
- **AI agents.** Purpose-built AI assistants trained for specific tasks: drafting legislative summaries, generating advocacy content, building event materials, analyzing member feedback, and dozens more. Agents go beyond chat by following structured processes with built-in guardrails.
- **AI phone agents.** Voice-based AI that handles inbound and outbound calls, understands natural language, routes calls intelligently, and integrates with your systems. Available around the clock.

Why This Matters Now

The window for competitive advantage is open, but it is narrowing. Associations that build AI capability now will compound those gains over the next 2 to 3 years. Those that wait will face steeper learning curves, higher costs, and peer organizations that have already baked AI into their operations.

Consider the math. If AI saves a single staff member 30 minutes per day on routine content and research tasks, that's 10 hours per month, or 120 hours per year. Multiply that across a team of 15, and you're looking at 1,800 hours recovered annually. At a blended cost of \$60 per hour, that's \$108,000 in productivity gained from a single use case.

Now multiply that across content production, legislative monitoring, event management, and member communications. The numbers get serious fast.

The Real Risk Is Not AI. It Is Unmanaged AI.

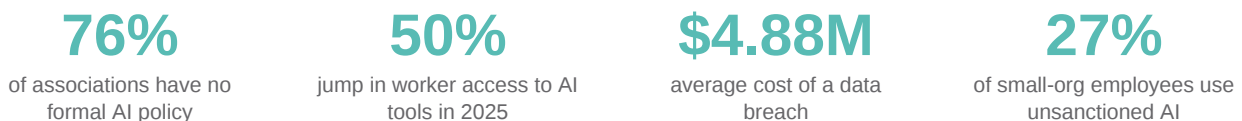
The biggest threat to your association comes from staff already using AI without your knowledge, approval, or oversight.

This is called Shadow AI, and it's happening at your organization right now. Staff members are copying member contact lists into free chatbots to draft renewal campaigns. Policy teams are pasting legislative text and internal analysis into consumer tools. Communications staff are generating newsletter content on platforms that may train AI models on your data.

The intentions are good. The risk is enormous.

Association member data is a particular exposure point. Contact information, dues payment history, engagement records, committee participation, advocacy positions, this is sensitive organizational data your members expect you to protect. When it flows into an unvetted AI tool, you've lost visibility and legal standing simultaneously.

The U.S. state privacy law landscape has shifted dramatically. As of 2026, more than 20 states have enacted comprehensive data privacy laws. The CCPA now requires formal privacy risk assessments before initiating any processing that creates "significant risk" to consumer privacy, a definition that explicitly reaches AI tool deployment. Colorado's AI Act takes effect June 2026. Penalties run up to \$7,500 per intentional CCPA violation. The compliance clock is ticking, and most associations are behind.



Banning AI doesn't work, and it puts you further behind. The real move is replacing unmanaged, ungoverned AI use with a structured, partner-led program. Same productivity. Zero exposure.

The Human-in-the-Loop Principle

AI works best when humans stay in the loop. Not for every step of every task, but for the decisions that matter: policy positions, member-facing communications, legislative analysis published under your association's name, and any content that could affect your members' regulatory environment.

Think of AI as the best intern you've ever had, one who works at machine speed, never gets tired, and produces polished first drafts. Your job is to direct, review, and approve. That division of labor captures most of the productivity gain while keeping human judgment where it belongs.

CHAPTER 04

What AI Can Do for Your Association

AI is a set of tools your teams can use today, for work they're already doing, to get better results in less time. The key is knowing where to point it.

Below is a practical look at how AI applies across the core functions of a trade or industry association, with specific examples drawn from the workflows that consume the most staff time and create the most direct member value.

Content Production and Publishing

Content is the engine of member value, and for most association teams, it's the biggest drain on staff capacity. Industry news articles, research summaries, best-practice guides, newsletter issues, social media posts, the demand is continuous, the deadlines are real, and the team is small.

AI accelerates every stage of the content lifecycle.

- **Industry news and research production.** Provide a topic brief, a set of raw data, or a research finding to AI and it produces a polished, publication-ready article matching your association's voice and editorial standards. What used to take a half-day of writing and editing now takes 30 minutes.
- **Content repurposing.** Upload a webinar transcript, a conference presentation, or a research report and AI produces multiple derivative assets: blog posts, newsletter articles, LinkedIn posts, social media copy, and key-takeaway PDFs, all from a single source. One conference session can feed 4 to 6 weeks of multi-channel content.
- **Newsletter production.** AI drafts, edits, and structures newsletter issues from multiple source materials, maintaining consistent voice and formatting. Teams that used to spend a full day assembling each issue get it done in under an hour.
- **Image generation.** The platform's built-in image generation tools create custom graphics for articles, event promotions, social posts, and advocacy campaigns, no design team or stock photo subscription required.

Member Recruitment and Engagement

Member value is the foundation of renewal. AI helps associations deliver more of it, more consistently, and to more member segments than a lean team could accomplish manually.

- **Recruitment content.** Generate compelling membership recruitment campaigns targeting specific member segments: email sequences, social media ads, landing page copy, and "Why Join" messaging tailored to different company sizes, roles, and industry sub-sectors.
- **Personalized member communications.** Move beyond one-size-fits-all messaging. AI segments members by attributes (industry focus, company size, engagement history, career stage) and

generates personalized communications for each segment at scale. AI-curated member experiences see engagement rates 2 to 3 times higher than generic outreach.

- **Members-only knowledge base.** Build a members-only resource where members ask natural language questions and get instant, sourced answers drawn from your association's entire content library: research papers, policy documents, webinar transcripts, guides. Members find answers in seconds instead of searching years of archives.
- **Renewal campaign automation.** Run multi-touch renewal campaigns triggered by membership expiration dates, generating personalized messaging that highlights each member's specific engagement history and the cost of leaving the association.

Legislative and Policy Affairs

Legislative monitoring is one of the most time-intensive functions in association management. Tracking bill introductions, amendments, committee votes, agency rulemaking, and regulatory guidance across multiple jurisdictions is a job that never stops, and falling behind has real consequences for your members.

- **Legislative and regulatory analysis.** Upload the full text of proposed legislation or a new regulatory document. AI produces a structured summary with key provisions, member impact analysis, and plain-language explanations of what changed and what it means for the industry. Hours of manual analysis become minutes.
- **Legislative tracking and alert system.** Automated monitoring workflows scan for new legislative activity across specified jurisdictions, generate structured impact summaries classified by jurisdiction and issue area, and distribute alerts to policy staff and member segments, ensuring your association is the first source members turn to when something changes.
- **Market and industry intelligence.** Conduct rapid research on industry trends, market conditions, and competitive dynamics. AI synthesizes findings from multiple sources into structured reports your team can publish or use for strategic planning.

Events and Education

Events and continuing education are core member benefits, and among the highest-cost, highest-effort functions for association staff. AI compresses the time required at every stage of the event lifecycle.

- **Event content and promotion.** Generate all marketing and operational content for conferences and webinars: email invitations, session descriptions, speaker bios, social media campaigns, early-bird promotions, and post-event follow-up materials. A complete content package for a major conference takes hours, not weeks.
- **Webinar and course development.** Create comprehensive educational content: course outlines, presentation scripts, talking points, quiz questions, and supplementary materials for webinars, certification programs, and online learning. Subject matter experts focus on content accuracy; AI handles the instructional scaffolding.

- **Post-event content pipeline.** Transform conference recordings, transcripts, and slide decks into blog posts, social media content, newsletter articles, and archived reference materials. Every event becomes a content asset that pays dividends for months.

Advocacy Campaigns

Associations are the voice of their industry. AI gives that voice more reach, more consistency, and faster production.

- **Call-to-action campaign content.** Generate template letters to elected officials, email copy, social media posts, fact sheets, and position paper first drafts that members can use to amplify your advocacy voice. Professional-grade materials go out faster, and more members participate because the process is easy.
- **Advocacy messaging and coalition materials.** Develop consistent, persuasive messaging across channels and audiences, member communications, media outreach, policymaker briefings, and coalition partner materials, all aligned with your policy positions and organizational voice.
- **Media relations support.** Draft press releases, op-eds, talking points for media appearances, and backgrounders for journalists covering your industry's policy priorities.

Board Governance and Administration

Board meetings, committee calls, and governance documentation are essential to running a sound association, and they consume significant staff time for preparation and follow-up.

- **Meeting documentation.** Transcribe board meetings and committee calls, generate structured minutes with decisions and action items, and distribute follow-up documentation to participants with assigned owners and deadlines. Accurate documentation produced in minutes, not hours.
- **Board reporting.** Generate professional board update memos through structured interviews, covering key performance indicators, membership metrics, financial highlights, and strategic initiative status, formatted for board-level review without manual assembly.
- **Governance documentation.** Create and maintain bylaws summaries, committee charters, conflict of interest policies, and board orientation materials that reflect current governance standards.

Operations and Technology

Association operations run on institutional knowledge, processes, historical decisions, and expertise that often lives in people's heads. AI helps capture, document, and scale that knowledge.

- **Internal knowledge base.** Create a searchable repository of internal processes, historical decisions, committee records, and institutional knowledge for staff and board members. Invaluable for onboarding new employees and preserving continuity across leadership transitions.

- **Standard operating procedures.** Turn informal processes into professional, audit-ready Standard Operating Procedures through structured AI interviews. Membership processing, event logistics, advocacy workflows, and governance procedures can all be documented in hours instead of days.
- **Member feedback analysis.** Distribute surveys, collect responses, and produce AI-analyzed reports identifying themes, sentiment trends, and actionable insights for leadership, replacing annual guesswork with continuous member intelligence.

CHAPTER 05

AI Agents: Your Digital Workforce

Beyond the Chatbot

Most people's first experience with AI is a chatbot: you type a question, you get an answer. That's useful, but it barely scratches the surface. The real power of enterprise AI lives in agents and automated workflows.

An AI agent is a purpose-built assistant designed for a specific task or process. Unlike a general chatbot, an agent comes pre-loaded with instructions, structure, guardrails, and domain expertise. It knows what questions to ask, what format to follow, what mistakes to watch for, and when to stop and ask for human input.

Think of the difference between handing someone a blank notepad and handing them a detailed checklist with step-by-step instructions. Both can get the job done. Only one does it consistently, every time, without missing steps.

What Makes an Agent Different from a Chat?

Structure. An agent follows a defined process. A legislative research agent doesn't just "summarize a bill." It identifies key provisions, assesses member impact by industry sub-sector, flags implementation timelines and enforcement mechanisms, and produces a formatted briefing document ready to distribute, every time, in the same structure.

Guardrails. Agents include built-in quality controls. A member communications agent trained on your voice and style guidelines won't drift into generic filler or banned language. A governance documentation agent will cite sources and flag when information needs human verification before it goes to the board.

Consistency. When 5 different staff members use the same agent, they get consistently structured outputs. The quality doesn't depend on who wrote the prompt or how experienced they are with AI.

Integration. Agents can connect to your business systems (AMS, email platform, event management software, file storage) and trigger actions in other applications without manual copy-and-paste.

Workflows: Agents That Run Themselves

If an agent is a skilled assistant, a workflow is a skilled assistant that works on autopilot. Workflows connect multiple steps into automated processes that run on a schedule, respond to triggers, or execute on demand.

Examples relevant to trade and industry associations:

- A workflow that monitors legislative sources for new activity relevant to your industry, generates structured member impact summaries, and distributes morning alerts to policy staff and relevant member segments every day.
- A workflow that triggers when a new member joins your AMS, generates a personalized welcome sequence tailored to their company size and industry focus, and schedules value-driven touchpoints over the first 90 days.
- A workflow that collects member feedback after each event, runs AI sentiment analysis across all responses, and produces a structured insights report for leadership review before the next board meeting.

You build workflows using a visual, drag-and-drop interface. No coding required. You describe what you want, connect the data sources, define the steps, and let it run.

The Framework IT Standard Library: 100+ Ready-to-Use Agents and Workflows

When you deploy Managed Framework AI, you don't start from scratch. Framework IT has built a library of over 100 agents and workflows, purpose-built for the types of work our clients do every day. For trade and industry associations, the most relevant tools span every core function:

- **Content Production.** Framework AI: Blog Writing Guru (industry news and member publications), Universal Sales & Marketing Engine (member recruitment campaigns and advocacy content), LinkedIn Viral Post Generator (executive and association thought leadership), Trend & Topic Researcher (industry intelligence and content angle development), Presentation Content Creator (webinar and conference materials), Marketing Image Architect (event graphics and social media visuals). Low-complexity adaptations ready on day 1.
- **Legislative and Policy Affairs.** Framework AI: Deep Research Assistant (legislative analysis and regulatory research with cited sources), Trend & Topic Researcher (emerging policy issues and industry movement). Low-complexity adaptation.
- **Member Recruitment and Engagement.** Framework AI: Knowledge Base Architect (members-only Q&A resource and internal staff knowledge base), Universal Sales & Marketing Engine (member recruitment campaigns and renewal messaging), Review Response Generator (managing public-facing responses on behalf of the association).
- **Events and Education.** Framework AI: Webinar Campaign Builder (full webinar promotion lifecycle), Expert Training & Curriculum Designer (member education programs and certification content),

Presentation Content Creator (conference and event slide content), Project Plan Architect (conference logistics and event planning).

- **Board Governance and Administration.** Framework AI: EOS L10 Meeting Assistant (board and committee meeting facilitation and documentation), Investor/Board Relations Aid (board reporting and stakeholder communications), IT Policy Creator and Editor (AI governance policies and member data handling procedures). Low-complexity adaptations.
- **Operations.** Framework AI: SOP Writer (staff procedure documentation), Knowledge Base Architect (institutional memory and internal resource hub), Project Plan Architect (association initiative planning), Call Log Analysis (ADEL phone agent integration for member inquiry management).

These 100+ tools are available on day 1 of your deployment, in addition to 500+ community-built apps already on the platform. Your team starts getting value immediately while you build toward custom solutions tailored to your specific workflows.

CHAPTER 06

The Major AI Models and Providers

One Platform, 70 Models

One of the most common mistakes organizations make when adopting AI is locking themselves into a single provider. Signing up for ChatGPT and assuming you've "covered AI" is like subscribing to a single news wire and assuming you've covered your legislative beat. Different AI models have different strengths, and the landscape changes fast.

Managed Framework AI, powered by Hatz AI, gives your organization access to 70 Large Language Models (LLMs) from the leading AI providers, all through a single secure platform. No separate subscriptions. No vendor lock-in. When a new model launches, it's added to the platform automatically.

The Major Providers

OpenAI builds the GPT family, including GPT-5, GPT-5.1, GPT-5.2, and GPT-5.4. These are the most widely recognized models and excel at general-purpose tasks including long-form writing, policy analysis, and structured content. GPT-5 Nano offers a cost-efficient option for high-volume, simpler tasks.

Anthropic builds the Claude family, including Claude 4.5 Sonnet, Claude 4 Opus, Claude 4.5 Opus, Claude Opus 4.6, and Claude Sonnet 4.6. Claude models are known for strong reasoning, nuanced analysis, and careful handling of complex instructions, particularly well-suited for legislative analysis, member-facing content that requires careful judgment, and long-form research synthesis.

Google builds the Gemini family, including Gemini 2.5 Pro, Gemini 3 Pro, and Gemini 3.1 Pro Preview. Google's models bring strong multi-modal capabilities and tight integration with Google's search and data infrastructure. Gemini 3.1 Flash is an excellent cost-efficient option for high-volume content tasks.

Meta builds the Llama family of open-source models, including Llama 4 Maverick and Llama 4 Scout, strong performance at lower cost for high-volume, routine tasks.

xAI builds Grok 3 and Grok 4, high-capability models with strong reasoning and conversational abilities.

Amazon offers Nova Micro and Nova Lite, cost-efficient models well-suited for high-volume, routine tasks where speed matters more than peak capability.

Specialized models include Perplexity Sonar for real-time web search with cited sources, particularly valuable for legislative monitoring, industry research, and any task requiring current information from the web.

How to Choose the Right Model

You don't need to become an AI model expert. The practical guidance is straightforward:

- **Complex analysis or judgment-heavy work** (legislative impact analysis, member-facing policy communications, board reports, strategic briefs): Use frontier models from OpenAI, Anthropic, or Google. They cost more per query but produce the highest quality output.
- **High-volume content tasks** (newsletter drafting, social media posts, event promotional copy, routine member emails): Use value models from Amazon, Meta, or the faster tiers from Google and OpenAI. They're significantly cheaper and fast.
- **Research with sources**: Use Perplexity Sonar when you need real-time information with citations, ideal for legislative monitoring and industry intelligence work.
- **Image generation**: The platform includes Nano Banana for creating custom graphics from text descriptions, in both standard and premium quality tiers.

A good rule of thumb: start with a frontier model to get the quality right, then test whether a cheaper model can produce comparable results for simpler tasks. Often it can.

Let the Platform Pick for You: Auto LLM

If your team would rather not think about model selection at all, Managed Framework AI includes an Auto LLM selector that does the picking automatically. Auto LLM analyzes every message in real time and routes it to the most capable and cost-efficient model based on task type, complexity, files attached, and tools involved. It operates per-message, so a quick scheduling question and a detailed legislative analysis in the same conversation each get the model best suited to them. As new models join the platform, the routing improves on its own.

Auto LLM is available in chat, agents, workflows, and apps. It can be set as a personal default by any individual user, or an administrator can set it as the default for the entire association so every team member gets governed, sensible model selection out of the gate.

Auto LLM offers 3 modes so you can match the routing to the work:

- **Lite.** Fast and lightweight for everyday questions and quick back-and-forth.
- **Performance.** The balanced default. Matches the right level of model to each task: depth when you need it, efficiency when you don't.
- **Turbo.** Maximum intelligence for complex, high-stakes work where you want the platform reaching for its strongest models (legislative impact analysis, board reports, advocacy strategy memos).

For most association teams, Performance mode is the right starting point. Power users and policy staff can move to Turbo for high-stakes analytical work. High-volume content roles can use Lite to keep credit consumption efficient on routine work.

CHAPTER 07

Prompt Engineering: Getting Better Results from AI

The Skill That Multiplies Everything Else

AI is only as good as the instructions you give it. A vague prompt produces a vague answer. A specific, well-structured prompt produces output that's genuinely useful, sometimes startlingly so.

Prompt engineering is the practice of writing effective instructions for AI, and it's a communication skill more than a technical one. A few core principles go a long way.

The Fundamentals

Be specific about what you want. Instead of "Write a newsletter intro," try: "Write a 2-paragraph introduction for our monthly industry newsletter. The audience is operations managers at mid-size manufacturing companies. The tone should be professional but conversational. This issue focuses on the proposed EPA emissions rulemaking published in the Federal Register last week. Lead with why this matters to our members and end with a transition to our full legislative summary."

The more context you provide, the better the output. Include details about the audience, purpose, format, tone, and constraints.

Assign a role. AI performs better when you tell it who to be. "You are a policy analyst with 15 years of experience covering federal environmental legislation for a manufacturing trade association" produces dramatically different output than "analyze this bill."

Provide examples. If you want output in a specific format or style, show the AI what good looks like. Paste in a previous member alert that hit the right tone, a legislative brief you were proud of, or a renewal email that got a strong response. AI is excellent at pattern-matching.

Break complex tasks into steps. Instead of asking AI to "analyze this legislation," walk it through the process: "First, identify the 5 most significant provisions. Then explain how each would affect small manufacturers in plain language. Then flag any implementation deadlines or enforcement mechanisms. Then draft a 2-paragraph member alert." Step-by-step instructions produce step-by-step quality.

Iterate, don't start over. Your first prompt rarely produces a perfect result. That's normal. Refine the output: "Make the tone more urgent." "Add a section on enforcement penalties." "Shorten to fit in a 300-word member email." Iteration is faster than starting from scratch.

Advanced Techniques

Chain of thought prompting. Ask AI to show its reasoning before giving a final answer: "Walk me through your analysis step by step before summarizing the member impact." This produces more accurate outputs and makes it easier to spot errors in the reasoning, important for policy analysis where precision matters.

Few-shot prompting. Provide 2 or 3 examples of the input-output pattern you want, then ask AI to follow the pattern with new input. Particularly powerful for standardizing legislative brief formats, member alert structures, or meeting minutes templates across your team.

Constraint-based prompting. Tell AI what not to do: "Do not include legal recommendations. Do not exceed 250 words. Do not use passive voice. Do not claim this is legal advice." Constraints sharpen the output and prevent the most common problems in member-facing policy content.

Template prompts. Build reusable prompt templates for tasks your team performs repeatedly, legislative analysis briefs, renewal campaign emails, event descriptions, board update memos. When a team member writes a prompt that produces great results, save it and share it. Your best prompts become organizational assets, not individual tricks.

Hallucinations and AI Accuracy

AI models occasionally produce confident-sounding information that is factually wrong. This matters most in legislative analysis, regulatory guidance, and policy-specific claims, areas where precision is essential and errors have consequences for members.

The risk is manageable with the right approach. Use Perplexity Sonar or web-search-enabled models for any task requiring current or cited information. Treat AI output as a well-informed first draft, not a finished product. Build human review into any workflow that produces member-facing or board-facing content. For policy analysis, verify specific statutory citations and regulatory references before publication.

AI that's 90% accurate with human review is still dramatically faster than starting from scratch. The goal isn't to remove human judgment, it's to get human judgment working from a better starting point.

CHAPTER 08

AI Security, Privacy, and Member Data Governance

The Responsibility You Accepted When You Took the Job

Every trade and industry association handles member data. Contact information. Dues payment history. Company profiles. Advocacy positions. Committee participation records. Event attendance. Engagement patterns.

Your members gave you that data because they trust your organization to protect it. That trust is the foundation of the membership relationship, and it's now under pressure from a new direction: artificial intelligence.

This chapter covers the member data privacy obligations your association carries, the specific risks that AI creates for that data, and the governance framework that protects both.

The Shadow AI Problem in Associations

Shadow AI is almost certainly running inside your association right now. Staff members who've found AI useful have adopted tools on their own, ChatGPT for drafting newsletters, consumer AI tools for summarizing legislative documents, free platforms for generating event descriptions. The motivations are good. The governance is nonexistent.

Here's what's at risk. When a staff member pastes a member contact list into a free AI tool to personalize a renewal campaign, that data may be used to train the model. When a policy analyst uploads a committee discussion document to get a summary, that content leaves your organization's control. When a communications staffer uses an unvetted platform to draft member communications, there's no audit trail, no data processing agreement, and no legal recourse.

The 2025 Reco AI State of Shadow AI Report found that 27% of employees at small organizations (those with 11 to 50 staff) are using unsanctioned AI tools. The same report found that unsanctioned tools persist in workflows for an average of 400 days before they're detected or addressed. The exposure window is long, and most associations have no systematic way to know it's open.

The State Privacy Law Landscape

There is no single dominant compliance framework for trade associations the way HIPAA governs healthcare or ABA ethics rules govern law firms. What associations have instead is a rapidly expanding patchwork of state data privacy laws that create real obligations, and real exposure, for organizations that handle member data.

As of 2026, more than 20 U.S. states have enacted comprehensive data privacy laws. The most consequential for associations include:

California Consumer Privacy Act (CCPA) and CPRA Regulations. The most comprehensive U.S. privacy framework. CCPA grants consumers, including individual members, rights to know what data you hold, request deletion, and opt out of certain processing. Regulations effective January 1, 2026 require organizations to conduct formal privacy risk assessments before any processing that presents a "significant risk" to consumer privacy, a definition that explicitly includes deploying AI tools that process consumer data. Civil penalties run up to \$2,500 per unintentional violation and \$7,500 per intentional violation. The California Privacy Protection Agency is actively enforcing.

Virginia, Colorado, Connecticut, Texas, and 15+ additional state laws. These laws impose overlapping obligations: data minimization, purpose limitation, consent requirements for sensitive data, opt-out rights for certain uses, and data protection assessments. The Colorado AI Act, effective June 2026, adds specific obligations for high-risk AI systems used in consequential decisions. Associations that communicate with members across multiple states must navigate this entire patchwork.

The practical exposure for associations. Member data is personal information under every major state privacy law. That means your association's AI practices (including what tools staff use, what data flows into those tools, and what data processing agreements you have in place) are now compliance decisions, not just operational choices. If your staff are using personal or consumer AI tools to process member data, you are almost certainly out of compliance with multiple state laws.

Compliance-to-Platform Mapping

The table below maps the primary member data privacy obligations to the specific Managed Framework AI platform capabilities that address them.

Obligation	Requirement	Managed Framework AI
CCPA/State Laws: Data Protection	No member PII used to train AI models	Zero-data-training contractual guarantee with all AI providers
CCPA: Privacy Risk Assessment (eff. 1/1/2026)	Formal assessment before AI processing of consumer data	SOC 2 Type I & II certified; DPAs available upon request
CCPA/State Laws: Data Subject Rights	Respond to member access, correction, and deletion requests	Data export and deletion available; retention policies configurable
CCPA/State Laws: Vendor Management	Written contracts with AI vendors governing data use	Data Processing Agreements available; SOC 3 public certification
Colorado AI Act (eff. June 2026): High-Risk AI	Transparency and impact assessments for consequential AI systems	Role-based access controls; full audit trails; human-in-the-loop design
Multi-State Compliance: Audit Trail	Documented evidence of AI governance for regulators	Full, searchable logs of all AI usage: who, what, when
Cyber Insurance: AI Governance	Documented AI policy and governance framework for underwriters	Policy templates, usage controls, admin dashboard, audit logs

The 6 Pillars of an AI Governance Framework for Associations

1. Policy. A written AI use policy defining approved tools, prohibited data types, and acceptable use cases. This is your first line of defense. It needs to define specifically what member data categories (contact information, payment records, advocacy positions, committee materials) are off-limits for public AI tools. Without a policy, you can't enforce your position or defend it to a state privacy regulator.

2. Access control. Role-based permissions ensuring the right people have access to the right AI capabilities. Staff who work directly with member databases need different guardrails than communications staff generating content. A well-designed permission structure prevents confusion, limits risk, and keeps your data handling consistent with your privacy obligations.

3. Data protection. Contractual zero-data-training guarantees and Data Processing Agreements (DPAs) with every AI provider that handles member data. CCPA requires written contracts with service providers that process personal information on your behalf. If it isn't in writing, it doesn't satisfy the legal requirement. Your platform must guarantee that member data is never used to train any public AI model, full stop.

4. Auditability. Full, searchable logs of who used AI, what prompts were entered, and what was returned. This is the documented evidence you need if a state privacy regulator asks how your association governs

AI, or if a cyber insurance carrier requires documentation of AI risk controls. If you can't produce a governance report on demand, you have a gap.

5. Training. Ongoing education so your policies are understood and followed, not quietly worked around by well-meaning staff. Staff who don't understand what's at risk with member data are your biggest compliance exposure. Real training means structured onboarding, recurring support sessions, and a culture where people know the rules and the reasons behind them.

6. Member Data Stewardship. Beyond compliance, associations have a relationship-based responsibility to the members who've shared their information with you. This pillar addresses the practices (data minimization, purpose limitation, retention schedules, and incident response) that protect the trust your members have placed in your organization. Every AI tool your staff uses should be evaluated through this lens: is the data we're processing in this tool something our members would expect and accept?

The Security Architecture Behind Managed Framework AI

Managed Framework AI is built on Hatz AI, which has achieved SOC 2 Type I, SOC 2 Type II, and SOC 3 certifications. Independent auditors have verified enterprise-grade security controls across infrastructure, application security, access management, encryption, monitoring, and incident response.

Your data is never used for AI model training. Managed Framework AI has contractual agreements with all AI model providers (OpenAI, Anthropic, Google, Meta, xAI, Amazon, and others) that explicitly prohibit training on your data. When a staff member submits a prompt, the data is processed and returned. It isn't stored by the provider. It can't improve their models or appear in responses to other users. This is a contractual guarantee, not a policy suggestion, and it's the foundation of CCPA vendor contract compliance for associations.

Encryption. All stored data is encrypted using AES-256 encryption (the same standard used by financial institutions and government agencies). All data in transit uses TLS 1.2+ encryption. These controls meet or exceed the technical safeguards required under most state privacy laws.

Data isolation. Each organization's data is logically isolated. Your association's member data is never commingled with other clients' data. Administrators have full visibility into usage, credit consumption, and audit trails.

Compliance. The platform supports compliance with CCPA, GDPR, HIPAA (with Business Associate Agreement), and SOX. Data Processing Agreements are available upon request. SOC 2 Type II satisfies most enterprise security questionnaires and provides the documented evidence of due diligence that state privacy regulators and cyber insurers increasingly require.

CHAPTER 09

Your AI Adoption Roadmap: The Crawl-Walk-Run Framework

From Zero to Measurable ROI

The associations that succeed with AI follow a deliberate methodology, one that meets teams where they are, builds confidence through early wins, and progressively expands capability without creating governance gaps along the way.

Gartner research shows 80% of AI licenses go unused without structured adoption support. The Crawl-Walk-Run framework makes sure your investment produces results, not shelfware.

Why Crawl-Walk-Run?

Organizations that rush AI deployments encounter the same problems: low adoption, confused users, security concerns, and an inability to prove value. The Crawl-Walk-Run model addresses each of these by design:

- **Reduces risk.** Resolve governance and member data protection questions before AI reaches your full team, not after something goes wrong.
- **Builds confidence.** Give staff time to learn the basics before asking them to do something complex. They adopt tools more readily and with greater enthusiasm.
- **Delivers measurable wins early.** Target a high-value, low-complexity pilot workflow in the Walk phase to create tangible proof of value that earns board confidence and funds further investment.
- **Creates internal expertise.** Each phase develops champions and power users, so the organization builds its own AI capability rather than staying permanently dependent on outside help.
- **Scales sustainably.** By the time you reach the Run phase, the governance, cultural habits, and technical skills are already in place to support broader, more ambitious AI initiatives.

Phase 1 (Crawl): Building the Foundation

Timeline: Weeks 1-4

The Crawl phase lays the groundwork. Before anyone builds a workflow or automates a process, your association needs to answer fundamental governance questions, especially given your member data obligations under state privacy laws.

1. Classify your member data for AI use. Before deploying any AI tool to staff, define exactly what data categories are in scope. Distinguish between data that's safe to process in AI tools (public industry

content, draft communications, general research topics) and data that's off-limits (member contact records, dues payment information, committee materials, individual advocacy positions). This classification becomes the foundation of your AI use policy and satisfies the data minimization principles embedded in most state privacy laws.

2. Establish an AI Acceptable Use Policy. Create or update a formal policy covering approved tools, prohibited data types, acceptable use cases, and data handling requirements. Reference your state privacy law obligations explicitly, especially CCPA if you have California members. This policy doesn't need to be perfect on day 1. It needs to exist, be communicated, and be enforced.

3. Define roles, permissions, and your user structure. Determine who will use the AI platform and what they'll be allowed to do. Communications and content staff have different AI needs, and different risk profiles, than policy staff working with legislative documents or membership staff handling PII. Build that distinction into your platform permissions from the start.

4. Execute a Data Processing Agreement. Before any member data flows through the system, execute a DPA with your AI platform provider. This satisfies the CCPA written contract requirement for service providers processing personal information on your behalf, and documents your due diligence for any future regulatory inquiry.

5. Identify and develop AI Champions. Select enthusiastic, influential staff members and invest in their skills early. These individuals become your internal experts, the people colleagues turn to with questions, ideas, and help requests. Champions should complete the AI Champion Certification to build credibility and depth.

6. Deploy general-purpose AI capabilities. Bring staff onto the platform with a curated set of starting tools: content drafting, research summarization, brainstorming, and meeting note processing. Give everyone something immediately useful that doesn't require handling member data directly, so early adoption builds confidence while governance gets established.

7. Establish an AI-forward culture from leadership. Culture change doesn't happen by memo. Leadership must visibly commit by using the tools themselves, sharing their own experiences, and actively encouraging teams to experiment. An all-staff introduction near the start of the Crawl phase sets the tone.

8. Launch recurring support sessions. Framework IT's Office Hours, which run 3 times per week, are where early questions get answered, good prompts get shared, and staff build the confidence that drives real adoption.

By the end of Crawl: Member data classified for AI use, AI use policy in place and communicated, DPA executed, users onboarded and exploring, champions developing expertise, and leadership visibly backing the effort. Foundation built.

Phase 2 (Walk): Guided Exploration and First Wins

Timeline: Months 1-4

The Walk phase is where AI moves from curiosity to capability. Your association is ready to tackle real workflows with guidance.

1. Content automation pilot. Content production is the highest-value, lowest-risk starting point for most associations. Identify one content workflow to automate first, weekly industry news roundup, monthly newsletter production, or social media calendar. Document the current state in detail: how long it takes, who's involved, what the pain points are. Build the AI-assisted version, measure the time savings, and share the results widely. This first documented win converts skeptics into supporters.

2. Legislative monitoring workflow. Build a workflow that monitors legislative sources for new activity relevant to your industry, generates structured member impact summaries, and routes alerts to policy staff and relevant member segments. This is one of the highest-value automation opportunities for associations and directly demonstrates AI's value to members. Measure the reduction in manual monitoring hours and the speed of member notification.

3. Member onboarding sequence. Build an automated onboarding workflow that triggers when a new member joins your AMS, delivers a personalized welcome series based on member attributes, and schedules value-focused touchpoints over the first 90 days. Measure early renewal rates for this cohort versus historical averages.

4. Train staff on member data handling in AI. As more workflows get closer to member data, reinforce the data classification rules from the Crawl phase. Run a short, practical session on what can and cannot flow through AI workflows, and why. The distinction should be second nature before you build direct integrations with your AMS.

5. Measure ROI and document your first win. After the pilot has run long enough to generate meaningful data, measure results against your baseline. How much time was saved? What did staff do with that time? What was the member experience? Share the results. Post them on your internal AI hub. Present them to leadership. This first documented win is the proof point that turns the board from AI-curious to AI-committed.

By the end of Walk: Targeted AI workflows deployed for content, legislative monitoring, and member engagement, first pilot automation measured, ROI documented, and a repeatable process for building future use cases.

Phase 3 (Run): Scaling, Independence, and Continuous Improvement

Timeline: Months 4-6+

The Run phase marks the transition from guided experimentation to organizational self-sufficiency.

1. End-to-end conference management system. Orchestrate all elements of a major conference through connected AI workflows: content generation, registration communications, speaker coordination, attendee personalization, and post-event content pipeline. Each year's event builds on the previous one's data and content assets rather than starting from scratch.

2. Member engagement intelligence. Build workflows that analyze engagement patterns across all member touchpoints (event attendance, content consumption, renewal history, communication response rates) to score membership health, identify at-risk members before they lapse, and flag high-engagement members ready for deeper involvement such as committee participation, board service, or sponsorship.

3. Multi-channel advocacy orchestration. Coordinate comprehensive advocacy campaigns across email, social media, and member direct outreach, tracking participation, adjusting messaging based on engagement data, and reporting aggregate impact to board and leadership. Give your government affairs team the campaign execution capability of a much larger organization.

4. Formalize your AI governance review cycle. By the Run phase, your AI program is a material part of operations. Establish a quarterly governance review covering: AI use policy updates (state privacy law developments happen frequently), data classification reviews, new workflow approvals, staff training status, and vendor agreement renewals. This is also your recurring touchpoint with Framework IT through the monthly AI Strategic Business Review (AI SBR).

By the end of Run (which never truly ends): Your association is building and deploying AI solutions independently, tracking measurable value across multiple functions, continuously identifying new opportunities, and maintaining a governance posture that keeps pace with an evolving regulatory landscape.

CHAPTER 10

Managed Framework AI: The Complete AI Adoption Program

Not a Software Subscription. A Managed AI Adoption Program.

Managed Framework AI is a full managed AI adoption program that combines the most powerful multi-model AI platform available with a proven adoption methodology, structured training, and the ongoing guided support that turns platform access into measurable business outcomes.

You get enterprise-grade tools, governance, and a named Framework IT team accountable for your results.

Three Pillars: Safe. Governed. Productive.

Safe. We help associations adopt AI in a way that reduces risk around member data exposure, state privacy law compliance, inappropriate use, and policy misalignment, so leadership can approve AI with confidence and staff can use it without creating invisible liability.

Governed. We give leadership and IT greater visibility, control, standards, and guardrails so AI use is managed intentionally rather than emerging chaotically. When a state privacy regulator, cyber insurance carrier, or board member asks "How does your association govern AI?" your organization has a documented, defensible answer.

Productive. We turn AI into practical business outcomes through enablement, use-case alignment, workflow improvement, and measurable gains in efficiency and member value, so the investment in AI compounds over time instead of quietly gathering dust.

What Is Included

Access to 70 AI Models. ChatGPT, Claude, Gemini, Llama, DeepSeek, and more. Never locked into one vendor. Automatic access to new models as they are released.

Unlimited Users. No per-seat pricing surprises. Every team member included.

100+ Framework IT Standard Agents and Workflows. Purpose-built tools covering content production, member engagement, legislative research, events, advocacy, board governance, and operations. Ready on day 1, in addition to 500+ community-built apps on the platform. Easily cloned and customized for your specific workflows.

No-Code Workflow Builder. Build powerful automations with drag-and-drop. 62+ native integrations plus thousands more through Zapier. Zero developers needed.

AI Phone Agent (ADEL). Voice AI for member inquiry handling, consistent, governed, and available around the clock. Handles inbound member questions, routes to appropriate staff, integrates with your systems.

AI Champion Certification. A structured training curriculum (approximately 90 minutes) that takes your team from first-time users to confident, productive AI practitioners.

SOC 2 Type I and II Certified. CPA-audited over 6+ months. Independently certified. Your member data is never used to train any public AI model. Contractually guaranteed. Data Processing Agreements available upon request.

Office Hours: 3 Sessions Per Week

Most AI platforms hand you a login and wish you luck. Managed Framework AI includes 3 live Office Hours sessions per week, working sessions facilitated by Framework IT's AI team where your people get hands-on help with real work.

Live Coaching and Q&A. Bring your questions. Get answers. Whether you're struggling with a prompt for legislative summaries, trying to figure out which model works best for member communications, or wondering how to approach a specific automation, our team works through it with you in real time. No question is too basic.

Use Case Workshops. Structured sessions where we build a specific workflow, agent, or automation together, with your input, on problems that matter to your association. Your team brings their own use cases and we help architect and build custom agents right there in the session. This is where people go from "I understand what AI can do" to "I just built something that saves me 3 hours a week."

Show and Tell and Peer Learning. Users share wins, discoveries, tips, and creative applications with each other. This is where the best ideas spread across the organizations in the program. Someone from a manufacturing association shows how they automated their regulatory alert system. Someone from a trade group shares a prompt template for event promotion that generates ready-to-publish copy in minutes.

Monthly AI Strategic Business Review (AI SBR)

Every month, your Framework IT team conducts a Strategic Business Review (AI SBR) dedicated to your AI program, reviewing adoption metrics, assessing progress against your AI Implementation and Adoption Roadmap, identifying new use cases, and planning training and enablement activities. Your roadmap is a living plan that evolves as your organization's AI maturity grows.

The Framework AI Resources Hub

Every Managed Framework AI client gets access to the Framework AI Resources Hub, a dedicated web portal that puts every training material, guide, tool, and enablement resource your team needs in one place. Everything is available from day 1 and updated on an ongoing basis as the platform evolves and your team's needs grow.

What you'll find in the Hub:

- **Platform Overview.** A summary of Managed Framework AI and what is included in each service plan.
- **Adoption Program Overview.** How Framework IT works with you on AI implementation and adoption, including the implementation methodology and examples of strategic AI roadmaps.
- **Getting Started Guide for Leaders.** A step-by-step resource that helps executive directors, CEOs, and senior staff sponsor, launch, and sustain AI adoption across the association.
- **Getting Started Guide for Employees.** A practical guide for individual users to get up and running quickly, covering first steps, best practices, and common use cases.
- **Training Videos.** On-demand video walkthroughs of platform features and best practices, available on Framework IT's YouTube channel.
- **AI Tips and Best Practices.** Practical guidance for getting strong AI results without overspending on credits, covering prompt techniques, model selection, and everyday efficiency.
- **Training Calendar and Office Hours Schedule.** The full calendar for upcoming Office Hours sessions and any special training events Framework IT is running.
- **Industry-Specific AI Playbooks.** Tailored AI implementation strategies and use cases for specific industries, including this Trade and Industry Association edition along with editions for legal, financial services, accounting, consulting, and more.
- **ROI Tracking Resources.** Templates and guidance for measuring and documenting AI's business impact across your organization.
- **Standard AI Tools, Workflows, and Agents.** A complete library of the standard AI tools, workflows, and agents Framework IT has built and shares with clients.
- **Industry Use Case Ideas.** Curated AI use case concepts organized by industry to help your team identify where AI can create the most value in your specific field.
- **AI Blogs and Articles.** Links to recent Framework IT blog posts and articles related to AI, covering new developments, strategies, and practical guidance.

Access the Hub at infohub.helpgetairight.com (password: helloframeworkit). The Hub is the central reference point your AI Champions and team members return to throughout the program.

Accelerator Plans: Go Deeper, Build Faster

For associations that want to accelerate AI maturity, Framework IT offers Accelerator Plans: packages of consulting hours where our AI team works directly with yours to develop custom agents, workflows, and automations. The key word is "with." Accelerator Plans are collaborative engagements designed so your team learns and upskills along the way.

Typical engagements include custom agent development (legislative monitoring, member communications, content pipelines), workflow automation (AMS integration, event management, renewal sequences), and department-specific rollouts.

How Managed Framework AI Compares

Feature	Microsoft Copilot	ChatGPT Team	Managed Framework AI
Users Included	25 seats	25 seats	Unlimited
AI Models	1 model	1 model	70 models
Adoption Support	None included	None included	Crawl-Walk-Run framework
Data Training	May use your data	May use your data	Zero training, guaranteed
Contract	Annual	Annual	Month-to-month available
Dedicated IT Partner	No	No	Named Framework IT team
Ongoing Enablement	No	No	Office Hours 3x/week, monthly AI SBR
Pre-Built Agents	Limited	Limited	100+ Framework IT + 500+ community
CCPA/State Privacy Compliance	Partial	None	DPA's available; SOC 2 Type II certified
Member Data Governance Controls	Limited	None	Role-based access; full audit trails; zero-data-training guarantee

CHAPTER 11

AI Governance Readiness Checklist: Is Your Association Ready?

Use this checklist to assess where your association stands today. Score yourself honestly. Most organizations start with fewer than half of these checked, and that's entirely normal.

Policy and Leadership

- ☐ We have a written AI use policy that defines approved tools and prohibited data types
- ☐ Our leadership team has formally endorsed our AI strategy
- ☐ We have designated an internal AI Champion to lead adoption
- ☐ Our AI policy has been communicated to all staff with system access
- ☐ Staff have acknowledged receipt and understanding of the AI policy
- ☐ Our AI policy is reviewed and updated at least annually (especially as state privacy laws evolve)
- ☐ Leadership actively uses AI tools and visibly supports the initiative

Member Data Protection and Privacy

- ☐ We have classified our member data into categories: safe for AI use vs. off-limits for public AI tools
- ☐ We have contractual zero-data-training guarantees from our AI platform provider
- ☐ We know which AI tools staff are currently using, including free and personal tools
- ☐ Member contact records, dues payment data, and advocacy positions are defined as off-limits for public AI tools
- ☐ We have Data Processing Agreements (DPAs) in place with every AI vendor that processes member data
- ☐ We have assessed our obligations under applicable state privacy laws (CCPA and others based on member geography)
- ☐ Staff know exactly which member data categories they can and cannot enter into AI tools

CCPA and State Privacy Law Compliance

- ☐ We have conducted or documented a privacy risk assessment for our AI tool usage (required under CCPA effective January 1, 2026 for processing that creates significant risk to consumer privacy)
- ☐ We can respond to member data subject rights requests (access, correction, deletion) within legally required timeframes
- ☐ Our AI vendor agreements satisfy the CCPA written contract requirement for service providers
- ☐ We have reviewed whether the Colorado AI Act (effective June 2026) applies to any of our AI use cases
- ☐ Our board has been briefed on the association's state privacy law obligations and AI's role in them

Access Control and Permissions

- ☐ AI access is role-based, not all staff have the same permissions
- ☐ We maintain searchable logs of AI usage (who, what, when)
- ☐ We can produce an AI governance report if requested by a regulator, insurer, or board member
- ☐ We have a process for reviewing and approving new AI tools before staff deployment
- ☐ User permissions are reviewed and updated when roles change
- ☐ Administrative access is restricted to authorized personnel only
- ☐ We have a defined offboarding process that includes revoking AI platform access

Training and Adoption

- ☐ Our team has received formal AI training, not just a policy memo
- ☐ We have shared prompt templates for common tasks (legislative summaries, member alerts, event copy)
- ☐ We are tracking AI adoption metrics (usage, time saved, ROI)
- ☐ We have a structured plan to expand AI usage over the next 6 months
- ☐ New staff receive AI onboarding as part of standard orientation
- ☐ We have identified and developed AI Champions within the organization
- ☐ We maintain a use case repository documenting AI wins and lessons learned
- ☐ Staff have access to recurring support (Office Hours, coaching, help desk)

Member Data Stewardship

- ☐ We have reviewed our member data retention policies in light of AI usage
- ☐ We have an incident response plan that includes AI-related data events
- ☐ We have a process for vetting new AI tools against member data privacy obligations before deployment
- ☐ Our board has approved our AI governance framework
- ☐ We communicate transparently with members about how AI is used in our operations
- ☐ We treat member data with the same level of care in AI tools as in any other system

Workflow and Automation Maturity

- ☐ We have identified our top 3 to 5 highest-value AI use cases
- ☐ We have documented baseline metrics (time, cost) for at least 1 target workflow
- ☐ We have completed at least 1 AI pilot and measured results
- ☐ We have a pipeline of future automation opportunities
- ☐ We have mapped which pre-built agents align with our highest-value use cases
- ☐ Our AI automations include human review checkpoints for member-facing or policy-sensitive outputs

Governance and Continuous Improvement

- ☐ We have a recurring forum for AI governance (steering committee, quarterly leadership review)
- ☐ We review AI adoption metrics and ROI data at least monthly
- ☐ We have a process for prioritizing new AI use cases based on member and organizational impact
- ☐ We regularly share AI wins and best practices across the organization
- ☐ We have a feedback loop between users and the team managing the AI program
- ☐ Our AI roadmap is a living document updated based on progress and evolving state privacy law developments

How to Read Your Results

0-15 boxes checked: You're in the early stages. Most associations start here. The important thing is to start building the foundation. The Crawl phase is designed exactly for this, governance and member data classification first, then capability.

16-30 boxes checked: You have meaningful progress but significant gaps remain. You're likely ready to move into the Walk phase, tackling targeted use cases while shoring up governance and member data controls.

31-40 boxes checked: Your association has a mature AI governance posture. You're in or approaching the Run phase, ready to scale, build custom workflows, and drive continuous improvement.

41+ boxes checked: You're operating at a high level of AI maturity. Focus on continuous improvement, expanding to new functional areas, and ensuring your governance keeps pace with the evolving state privacy law landscape.

If you have unchecked boxes, you aren't alone. Most associations do. Managed Framework AI was built to help you check every one of them. As a managed AI adoption program, our team handles the platform, the

governance framework, the training, and the ongoing enablement, so you can adopt AI with confidence, with a named partner who stays accountable for results.

CHAPTER 12

Next Steps

You have the playbook. The question now is what you do with it.

If your association is ready to move from unmanaged AI usage to a structured, governed, productive AI program, here is how to start:

Request a consultation. We'll walk through where your association stands today, identify the highest-value opportunities (content production, legislative monitoring, member engagement) and show you exactly how Managed Framework AI works. No pressure, no pitch deck. Just a conversation about what makes sense for your organization.

Take the readiness checklist to your leadership team. Use it to start an internal conversation about AI governance, member data risk, and opportunity. The checklist alone is often enough to surface gaps that nobody was talking about. Boards that haven't discussed AI governance yet should.

Stop the bleeding on Shadow AI. Every day your staff uses unmanaged AI tools is another day your member data is at risk and your CCPA obligations are unmet. Getting onto a governed platform is the single highest-impact step you can take, and it doesn't require a long procurement cycle.

Framework IT has spent more than 16 years helping small and midsize organizations get technology right. AI is the next chapter, and we're here to help you write it.

Book a Consultation

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