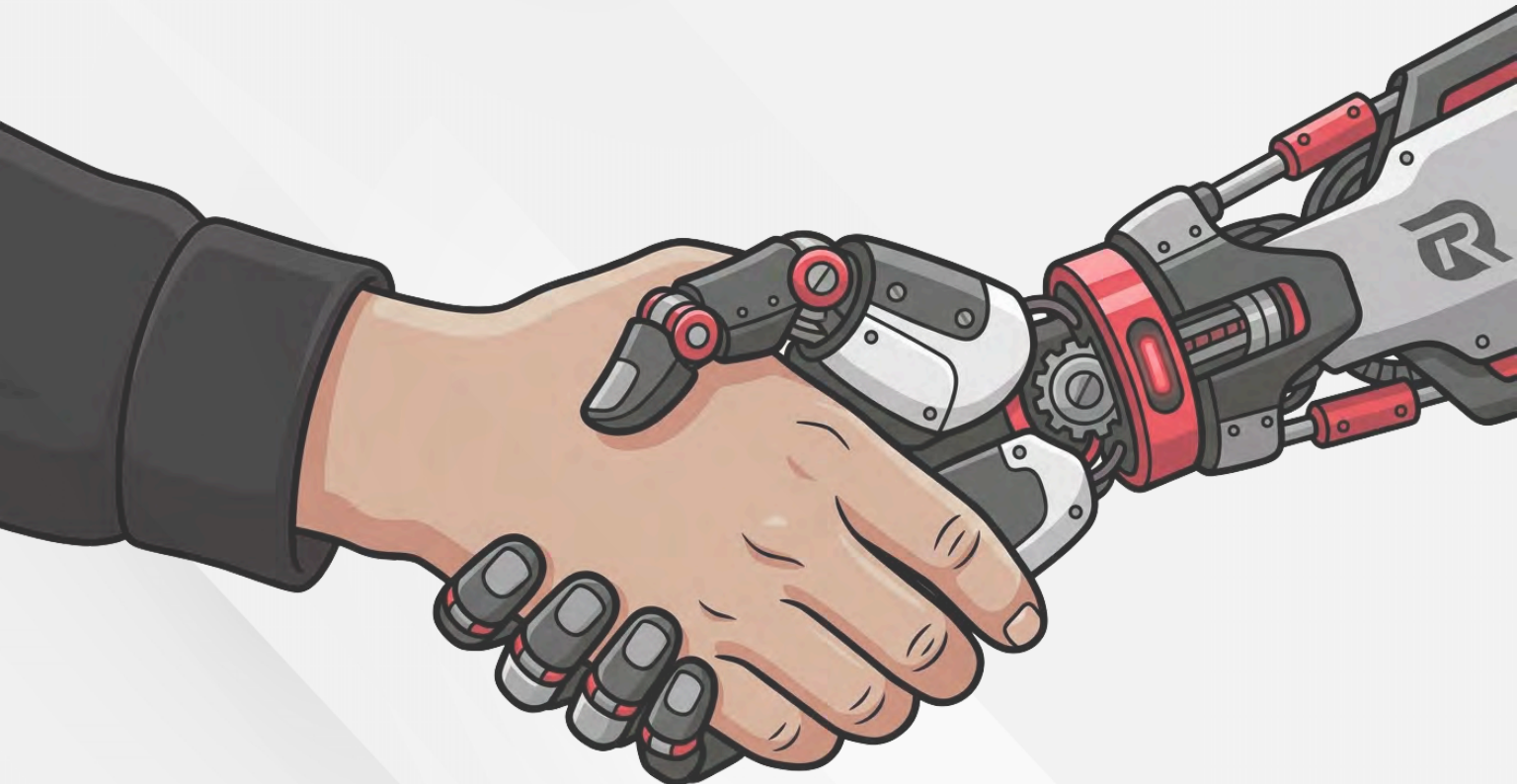


THE AI-READY CULTURE

LEADING PEOPLE THROUGH TRANSFORMATION



EXECUTIVE SUMMARY

Artificial intelligence is no longer an emerging technology on the horizon—it has arrived. For associations and nonprofits, the question is no longer whether AI will change your organization. It is whether your culture is ready to lead that change.

The uncomfortable truth is that most AI transformations fail not because of bad technology, but because of unprepared people and resistant cultures. Leaders deploy tools while overlooking the human dynamics that determine whether those tools are ever truly embraced.

This white paper, co-authored by .orgSource, .orgCommunity, and re:Members, presents a people-first framework for building what we call an AI-Ready Culture—one grounded in the principles of H.E.A.R.T. Powered Leadership™, drawn from the book *RUG: How to Move What You're Tripping Over and Lead with H.E.A.R.T.* by Sherry Whitaker Budziak and Kevin G. Ordoñez.

INSIDE, YOU WILL FIND:

- A clear diagnosis of why AI transformations stall in associations
- The AI-Ready Culture Framework built on Trust, Communication, and Experimentation
- The H.E.A.R.T. Powered Leadership™ framework for leading transformation with empathy, courage, and clarity
- Three critical leadership shifts that separate AI adoption from AI resistance
- The Clarity Communication Model (P.I.R.N.) for every AI conversation you need to have
- A practical 30-day action plan to begin building your AI-ready culture today



AI WON'T REPLACE YOUR ORGANIZATION. LEADERS WHO DON'T ADAPT WILL.

The leaders who successfully guide their organizations through AI transformation are not necessarily the most technologically savvy.

They are the ones who lead with H.E.A.R.T.

And the payoff is not only internal: an AI-ready culture is ultimately what your members feel—in more responsive service, more personalized engagement, and the kind of trust that drives retention and sustainable growth.

INTRODUCTION: THE DISRUPTION WE DIDN'T PLAN FOR

Disruption rarely arrives with a warning. But when it does, it rips away the familiar and forces us to confront what was always lying beneath our feet—the outdated assumptions, inherited habits, and unspoken fears that shape how we lead.

In our work, we see how organizations normalize obstacles over time—the processes no one questions, the meetings no one needs, the silences that go unbroken. We move past them every day, stepping around them unconsciously, until one day we stumble and realize they have been there all along. And they have been holding us back.

Artificial intelligence is accelerating this reckoning. Every organization now faces a version of this question: What are we tripping over that we have refused to see? And do we have the cultural readiness—and the leadership courage—to move it?

AI doesn't transform organizations. People do.

For association and nonprofit leaders, this moment is both an urgency and an invitation. The urgency is clear: member expectations are shifting, operational demands are rising, and AI-powered competitors are emerging across every sector.

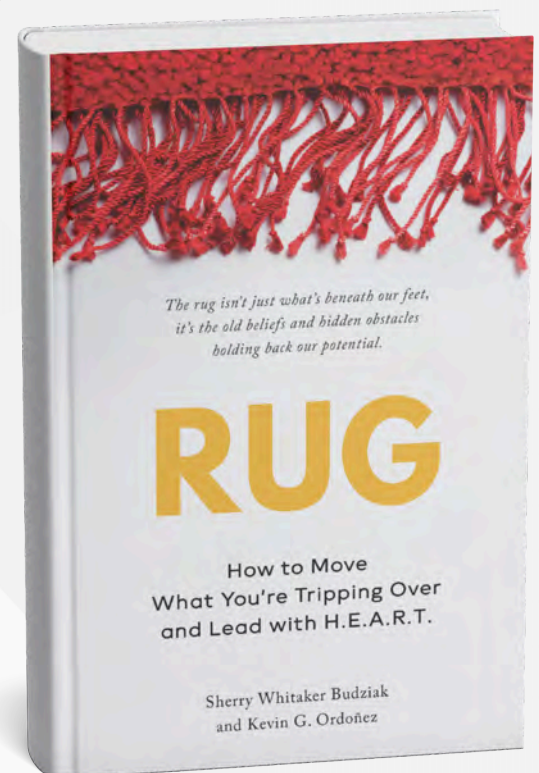
The invitation is less obvious but equally important: this is a rare moment to examine the obstacles beneath your culture, to strengthen the leadership behaviors that matter most, and to build the kind of organization your people—and your members—need.

A NOTE ON OUR PERSPECTIVE:

This white paper draws from our book ***RUG: How to Move What You're Tripping Over and Lead with H.E.A.R.T. (2025)***, from .orgSource's 25+ years guiding associations through transformation, and from re:Members' deep expertise in member engagement strategy.

The H.E.A.R.T.™ framework at the center of this work was born not just from strategy sessions, but from lived experience—from knowing what it takes to lead through disruption when the stakes are deeply personal.

WWW.RUGTHEBOOK.COM



THE CULTURAL BLOCKERS BENEATH AI TRANSFORMATION

In nearly every transformation project we have led, the real barrier to progress is not the technology. It is the cultural blocker—the normalized dysfunction, unexamined assumption, or pattern that everyone has learned to step around so carefully that they have forgotten it is there.

The concept is simple: a cultural blocker is anything your organization keeps tripping over that it refuses to acknowledge, examine, or move. These blockers are not always dramatic. Most often they are quietly embedded in daily routines—systems no one trusts, traditions with purposes no one remembers, approval loops that were built for a slower era.

**“WHAT WE REFUSE TO
ACKNOWLEDGE, *WE
EVENTUALLY TRIP
OVER.*”**



In the context of AI transformation, these blockers tend to appear in three places:

BLOCKERS IN TEAMS

Staff who fear AI will render their roles obsolete. Silence from leadership that confirms their worst fears. A culture where asking “I don’t know how to do this” feels unsafe. Teams that wait for permission before experimenting—and permissions that never come.

BLOCKERS IN THE BOARDROOM

Governance models designed for a 2010 world, unable to move at AI-era speed. Boards that haven’t had an honest conversation about AI’s role in strategy. Approval loops so long that pilots are obsolete before they begin. Leaders who project false confidence rather than modeling genuine curiosity.

BLOCKERS IN OPERATIONS

Legacy processes that AI could improve but no one has reviewed in years. Data structures that are too disorganized to support AI-driven insights. Organizations where quick wins are celebrated in isolation rather than shared as learning. A culture where innovation shame—the fear of looking incompetent—stops experimentation before it starts.

These blockers do not always look dangerous. That is exactly what makes them so hazardous. We become accustomed to stepping around them. We develop workarounds. And then we wonder why we are not moving forward.

The first act of AI-ready leadership is the same as every other act of genuine transformation: ***you have to be willing to look closely, see the blocker for what it is, and choose to move it.***



**YOU DON'T NEED A
TITLE TO CONFRONT
WHAT'S HOLDING
YOU BACK.**

**YOU NEED THE
COURAGE TO SEE IT.**

WHY AI TRANSFORMATIONS FAIL



The evidence is mounting. Organizations across every sector have invested in AI tools, platforms, and pilots—and most have underperformed expectations.

The question we are consistently asked is: why?

The answer is almost never the technology. The answer is almost always the culture.

In our work with associations and nonprofits, ***we have identified four cultural blockers*** that consistently derail AI transformation efforts:

1. FEAR OF IRRELEVANCE

When AI arrives, the first question your people ask is not “How will this help us?” It is “Will this replace me?”

If leaders do not address this question directly, proactively, and honestly, silence becomes the answer. And silence confirms the fear.

Staff who believe their roles are threatened do not adopt tools enthusiastically. They comply minimally, or they resist quietly.

2. SILENCE AT THE TOP

When executive leadership avoids the AI conversation, it does not create a neutral vacuum. It creates anxiety. People fill silence with their worst assumptions.

The more senior the silence, the louder the anxiety it generates.

AI-ready cultures require leaders who speak openly about where their organizations are going and why—before the rumor mill gets there first.

3. PERMISSION CULTURE

Many associations operate in environments where multiple approvals are required before anything new can be attempted.

In stable environments, this caution creates quality. In fast-moving environments, it creates paralysis.

When the cost of trying something new is three meetings and a board vote, innovation dies not from resistance but from exhaustion. AI-ready cultures create deliberate space for small, sanctioned experiments.

4. INNOVATION SHAME

Perhaps the most insidious blocker is the unspoken rule that leaders must always project competence and certainty. When a technology as complex and rapidly evolving as AI arrives, this norm becomes a trap.

Leaders who cannot say “I don’t know how this works yet—let’s learn together” inadvertently signal to their teams that uncertainty is unacceptable. This stops experimentation before it starts.

CULTURAL BLOCKERS	AI-READY ANTIDOTE
Fear of Irrelevance	Proactive, mission-connected communication about AI's role
Silence at the Top	Consistent, transparent leadership voice on AI strategy
Permission Culture	Deliberate space for small, time-boxed experiments
Innovation Shame	Leaders modeling curiosity and publicly learning alongside their teams

A re:members PERSPECTIVE: WHAT STALLED TRANSFORMATION COSTS MEMBERS.

The blockers above are internal, but members feel their effects externally. When transformation stalls, the first casualties are delayed personalization, inconsistent outreach, and slower service responsiveness.

In re:Members' experience, these member-facing symptoms—flagging engagement scores, softening renewal rates, and rising response times—are often the earliest measurable signal that an AI transformation has stalled, surfacing long before the internal post-mortem.

WHAT IS AN AI-READY CULTURE?

An AI-ready culture is not one that has adopted every available tool. It is not one that has resolved every governance question or completed every staff training. An AI-ready culture is one where people feel safe enough to engage honestly with change—where experimentation is encouraged, communication is proactive, and trust is the baseline condition for every decision.

We define it through three interconnected conditions:

TRUST	COMMUNICATION	EXPERIMENTATION
People feel safe to question, experiment, and fail without fear of judgment or retaliation.	Leaders share purpose, impact, and reassurance proactively and consistently throughout change.	The organization values learning over perfection. Teams are empowered to try, iterate, and grow.

These three conditions are not values to post on a wall. They are experiences your people must feel—consistently—before AI can take hold in your culture. You cannot skip one. Trust without communication creates confusion. Communication without experimentation creates stagnation.

Experimentation without trust creates anxiety.

Building an AI-ready culture requires all three, simultaneously, beginning with the most fundamental: the willingness to see and address the human dimension of change.



A re:members PERSPECTIVE: WHAT THE CULTURE LOOKS LIKE FROM THE MEMBER'S SEAT.

Trust, communication, and experimentation are internal conditions, but members are the ones who ultimately experience whether they are real.

An AI-ready culture shows up in the data members generate: renewal rates that hold or climb, engagement scores that rise, and responsiveness metrics that shorten.

When the internal culture is working, members feel communications that are timely and personal rather than automated and cold. AI is the catalyst and culture is the multiplier—but the member experience is the proof.



**AI IS THE CATALYST.
CULTURE IS THE
MULTIPLIER.**

LEADING WITH H.E.A.R.T.

The H.E.A.R.T. Powered Leadership™ framework was not developed in a conference room. It was forged in the intersection of decades of consulting experience and deeply personal disruption. It is a framework built from what we have seen in boardrooms and what we have lived ourselves: that the best leadership in times of transformation is not the most technically skilled. It is the most deeply human.

H.E.A.R.T. stands for five leadership commitments that, taken together, create the conditions for genuine transformation:

H

Humanize — *Lead with empathy.*
Put people first.

Before any strategy, system, or solution—see the person.

Humanizing means having the courage to look beyond the surface: the human behind the title, the emotion behind the data, the story behind the performance.

In AI transformation, humanizing starts by acknowledging that every member of your team is navigating real fear about real change. You cannot move what you refuse to acknowledge. Humanize first—everything else becomes clearer after that.

E

Empower — *Trust deeply. Let others lead.*

Empowerment is not the absence of structure. It is the presence of deliberate, distributed trust.

In AI transformation, empowerment means giving your team the permission, tools, and autonomy to engage with AI without constant oversight. It means moving decisions as close to the work as possible. It means saying “I trust you to try this” and meaning it.

Empowerment is the oxygen of innovation—without it, your best people will wait, and waiting is a strategy for being left behind.



A

Ascend — *Rise above comfort.* *Choose growth.*

Ascending means creating the conditions for your team to grow, even when—especially when—the path is unclear.

In AI transformation, this looks like replacing the demand for perfect plans with the discipline of smart experiments. It means celebrating learning as loudly as you celebrate outcomes. It means making psychological safety not a policy but a practice.

Ascend by running small bets, learning publicly, and iterating fast.



R

Reimagine — *Challenge norms.* *See possibility.*

Reimagining requires the courage to question the assumptions your organization has built its identity on.

What governance structures are designed for a world that no longer exists? What approval processes are slowing you down in the name of caution? What member engagement models are based on behaviors your members no longer have?

Reimagine means being willing to ask: do the assumptions we are operating on serve us anymore—or are we just used to?



T

Transform — *Rewrite your story. Lead from experience.*

Transformation is not a destination. It is a continuous act of leadership.

In the context of AI, transforming means redefining your identity as a leader for an AI-augmented organization. It means releasing the belief that leadership requires certainty—and embracing the truth that the most powerful thing you can model is genuine, curious learning.

Transformation begins the moment you choose to lead differently, not the moment the technology works perfectly.

In practice, for an association this transformation is most visible in member relationships: re:Members' work on AI-supported engagement shows that the payoff of leading differently is measurable—more responsive outreach, communications personalized at scale, and service interactions that feel human even when AI assists them.

Transformation that never reaches the member is not yet complete.





**THE LEADERS WHO
BUILD AI-READY
CULTURES ARE NOT
THOSE WHO HAVE ALL
THE ANSWERS. THEY
ARE THE ONES WHO
LEAD WITH H.E.A.R.T.**

The H.E.A.R.T. Powered Leadership™ framework is not a linear process. These five commitments work in concert, reinforcing each other across every leadership decision you make. But every meaningful transformation begins in the same place: with Humanize. With the courage to see what is actually happening beneath the surface of your organization.

THREE LEADERSHIP SHIFTS FOR THE AI ERA

The H.E.A.R.T. Powered Leadership™ framework describes who AI-ready leaders are. The three leadership shifts describe what they do differently every day. These are not personality traits. They are behaviors—specific, observable, and entirely within your control.

FROM	TO	WHAT THIS LOOKS LIKE
CONTROL	<i>EMPOWERMENT</i>	Decisions move closer to the work. Teams are briefed early. Leaders model learning, not just authority. Staff are trusted to pilot without constant approval.
CERTAINTY	<i>CURIOSITY</i>	Leaders replace “I need all the answers” with “Let’s learn together.” Questions become the currency of growth. Uncertainty becomes a design constraint rather than a leadership failure.

FROM	TO	WHAT THIS LOOKS LIKE
PLANS	EXPERIMENTS	Strategic roadmaps give way to iterative pilots. A two-week experiment produces more insight than a six-month plan. Learning is shared publicly, building psychological safety.

SHIFT 1: CONTROL TO EMPOWERMENT

Control worked for a long time.

In stable environments with slow-moving change, tight oversight created quality and consistency. But in an environment moving at AI speed, tight control creates bottlenecks. Your best people cannot move. Innovation stalls while waiting for approval.

Empowerment does not mean chaos. It means deliberate trust—with clear guardrails. It sounds like: “I trust you to try this—report back what you learn.” It sounds like: “You don’t need my approval to run a pilot.” These are not magic words. They are signals. They tell your team: I believe in your judgment.

SHIFT 2: CERTAINTY TO CURIOSITY

Certainty is the enemy of learning. And in AI, your organization will be learning for a long time.

The most powerful thing a leader can say during AI transformation is: “I don’t know exactly where this is going—and I’m genuinely curious to find out alongside you.”

This is not weakness. It is permission. When you model uncertainty as something safe to feel and voice, you signal to your entire organization that it is safe to learn here. Curiosity creates the psychological safety that experimentation requires.

SHIFT 3: PLANS TO EXPERIMENTS

The AI landscape is moving faster than any strategic plan can keep pace with.

Organizations thriving in the AI era are not the ones with the best roadmaps. They are the ones with the best learning loops. An experiment has a clear question, an owner, a defined timeframe, and one success measure.

That is it. Start small. Learn publicly. Repeat.

FROM THE RUG FRAMEWORK:

"Real change doesn't begin with disruption.

It begins with awareness. With empathy. With heart.

It begins the moment we pause, look down, and say:

I see it now. And I'm willing to move it."

MANAGING FROM THE MIDDLE: LEADING UP, DOWN, AND ACROSS

Not every leader reading this white paper is a CEO or executive director. Many of you are department directors, program managers, operations leads, or project coordinators—the people who sit at the most complex intersection in any organization: close enough to the work to see every friction point, and close enough to leadership to understand every strategic constraint.

You are often the first to see the blocker. And the last to feel you have permission to move it.

Managing from the middle during AI transformation is one of the most underacknowledged leadership challenges in the sector. You are asked to implement decisions you did not make, explain strategies you did not design, and reassure teams whose fears you may privately share.

At the same time, you are expected to translate the confusion and anxiety from below into productive feedback your senior leaders can act on—without appearing to be a dissenter, an alarmist, or someone who is “not on board.”

This is not a small ask. And it is rarely named.

“Middle leaders often see the blockers most clearly. The H.E.A.R.T. framework gives them the language to move them.”

LEADING UP: INFLUENCING WITHOUT AUTHORITY

Leading up means shaping the decisions of those above you in ways that serve both your team and your organization's mission. In AI transformation, this is critical—because senior leaders are often the last to hear honest feedback about what is actually happening in the organization.

If AI anxiety is building in your team but leadership believes adoption is going smoothly, you are sitting on information that matters. The question is: how do you surface it without being perceived as a roadblock?

FRAME IT AS INSIGHT:

Lead with data, not complaint.

Rather than “My team is worried about AI,” try: “I’ve noticed three patterns in how our staff are responding to the AI rollout—I’d like to share them so we can address them before they affect adoption.” Data creates distance from emotion and makes the conversation feel strategic rather than resistant.

CONNECT TO PURPOSE:

Use mission as your anchor.

When pushing back on a decision or timeline, connect your concern directly to member impact or organizational mission. “If we move this fast without the team training piece, I’m concerned we’ll see member-facing errors in Q3” is harder to dismiss than a general concern about pace.

BE THE BRIDGE:

Offer solutions alongside concerns.

Middle leaders who bring problems without options train senior leadership to see them as barriers. Middle leaders who bring problems and one or two potential paths forward become trusted advisors. Even a partial solution—"I don't have the full answer, but here's what I think could work as a first step"—changes the dynamic.

TIMING MATTERS:

Choose the right moment.

Raising concerns in a public meeting can feel like a challenge to authority. A private conversation, a well-timed email, or a scheduled one-on-one creates the space for real dialogue. Senior leaders are more likely to genuinely listen when they are not managing the perception of a room.

LEADING DOWN: HOLDING THE HUMAN LINE

When your team is anxious about AI and leadership is moving fast, you become the buffer—and that is exactly where H.E.A.R.T. leadership lives. Your team does not need you to have all the answers. They need you to make them feel seen in the uncertainty.

BE HONEST:

Acknowledge what you don't know.

Middle leaders who only pretend to have certainty, lose credibility fast. Saying “I don’t have the full picture yet, but here is what I do know” is a trust-builder, not a weakness.

HUMANIZE YOUR TEAM:

Create space for the questions people are afraid to ask.

Hold a team conversation that explicitly invites fear and uncertainty. “I want to make space for honest questions about the AI rollout—even the ones that might feel awkward.” That invitation alone changes the culture of a team.

BE THE INTERPRETER:

Translate, don't just transmit.

Your job is not simply to pass organizational messages down the chain. It is to translate them into language that is meaningful for your specific team’s context, roles, and concerns. The same announcement lands differently when it is grounded in “here is what this means for the work you do every day.”

LEADING ACROSS: BUILDING COALITIONS FOR CHANGE

Some of the most powerful AI transformation work happens not vertically—through the hierarchy—but horizontally, across departments and peers. Middle leaders who build lateral relationships create the informal networks through which real cultural change travels.

WHEN YOU ARE STUCK	TRY THIS LATERAL MOVE
Leadership isn't hearing the team's AI concerns	<i>Find a peer leader who shares your perspective and request a joint conversation with leadership—it's harder to dismiss two voices from different areas</i>
You lack authority to approve an AI pilot	<i>Partner with a peer department to co-sponsor the experiment—cross-functional initiatives often carry more organizational weight</i>
Your team is isolated in their AI anxiety	<i>Connect your team with peers in another department who have had a positive early AI experience—peer credibility moves faster than management messaging</i>
Resources are not reaching your team	<i>Identify which peer leader has already secured training resources and model your approach on theirs—then advocate together for broader access</i>

THE RUG INSIGHT FOR MIDDLE LEADERS

The blocker that middle leaders trip over most often is not the AI tool itself, it is the silent belief that ‘it’s not my place to say something.’

You don’t need a title to confront it.

You need the courage to see it—***and the relationships to move it together.***

TRUST:

THE CURRENCY OF AI LEADERSHIP

Every leadership action during AI transformation either builds trust or erodes it. There is no neutral. Understanding this is foundational to building an AI-ready culture, because trust is what makes every other element possible. Without it, communication is noise. Experimentation is threatening. Empowerment feels like abandonment.

TRUST BUILDERS	TRUST ERODERS
<i>Communicate about AI before decisions are made—not after</i>	<i>Announce decisions without context or preparation time</i>
<i>Acknowledge openly what you don't know yet</i>	<i>Use jargon or hype to project false AI confidence</i>

TRUST BUILDERS	TRUST ERODERS
<i>Involve staff in pilot design, not just rollout</i>	<i>Let rumors fill the information vacuum</i>
<i>Celebrate learning, not just successful outcomes</i>	<i>Punish honest mistakes made during experimentation</i>
<i>Connect AI to mission: “This helps us serve members better”</i>	<i>Frame AI primarily as cost-cutting or headcount reduction</i>
<i>Follow through on every commitment, every time</i>	<i>Move the goalposts without acknowledgment or explanation</i>

Trust is built through thousands of small decisions.

The distinction between the trust-building and trust-eroding columns above often comes down not to intent, but to communication.

When staff hear “AI will improve our efficiency,” they often hear “AI might eliminate my role.” When they hear “AI will help us serve our members more effectively,” they hear possibility. Same technology. Completely different cultural impact.

This is why Humanize comes first in the H.E.A.R.T. Powered Leadership™ framework. Before any tool is deployed, before any strategy is announced, before any pilot is designed, leaders must tend to the human experience of change.

Because your people will not follow the strategy. They will follow the trust.

A re:members PERSPECTIVE: MEMBER TRUST IS ON THE LINE, TOO.

The builders and eroders above describe staff trust, but member trust is equally at stake during AI transformation—and arguably more fragile, because members give you less benefit of the doubt than employees do.

Member trust erodes when AI is deployed poorly: communications that feel impersonal, automation that feels cold, and any hint that member data is being used in ways members did not expect.

It strengthens when AI is deployed well: faster, more relevant responses; outreach that demonstrates you understand each member; and transparency about how member data improves their experience.

The same Humanize-first discipline that protects staff trust protects member trust—and members notice the difference sooner than you might think.

COMMUNICATING THROUGH CHANGE: THE P.I.R.N. MODEL

Even leaders with the best instincts often struggle to structure AI conversations effectively. The challenge is not knowing what to say. It is knowing the right order in which to say it.

The Clarity Communication Model—P.I.R.N.—provides a repeatable structure for every significant AI communication, whether to staff, to your board, or to your membership.

P

Purpose — *Why are we doing this?*

Connect AI to your mission before anything else—why it matters, not just what it is. This is the “so that” statement: we are pursuing AI so that we can serve members more effectively, respond faster, and focus our people on the work that matters most.

Example: *“We are exploring AI because our members need faster, more personalized responses—and our current team capacity limits our ability to deliver that.”*

I **Impact** — *What does this mean for us?*

Be specific about what is changing and what is not. Role shifts, operational changes, timeline expectations—name them. Vagueness creates anxiety. Specificity creates trust, even when the news is complex.

Example: *“For our member services team, this means [specific change]. Your core responsibilities remain [what stays the same]. Here is what will look different.”*

R **Reassurance** — *Your concerns are valid.*

Do not dismiss or minimize fear. Name it. Acknowledge that uncertainty is real and that people’s concerns are legitimate. Reassurance is not false optimism—it is the honest acknowledgment that change is hard and that your people matter more than the technology.

Example: *“I know some of you have questions about your roles. Those concerns are completely valid. Our strategy is to amplify your work, not replace it.”*

N

Next Steps — *Here is what happens now.*

End every AI communication with concrete, specific actions. Uncertainty shrinks when there is a visible path forward. Give people something they can do, anticipate, or plan for.

Example: *“Here is what happens in the next 30 days: [timeline]. I am scheduling one-on-ones to hear your concerns directly. Your input will shape how we move forward.”*

The P.I.R.N. model works because it mirrors the sequence in which humans process change: they need to understand purpose before they can accept impact, and they need reassurance before they can commit to next steps. Leaders who lead with operational details (Impact) before establishing purpose create confusion. Leaders who offer reassurance without next steps leave people in a holding pattern.

Use P.I.R.N. for town halls, board presentations, staff updates, and individual conversations. It is not a script—it is a sequence. Adapt the language; honor the order.

KNOW YOUR CULTURE BEFORE YOU DEPLOY

One of the most common mistakes in AI transformation is moving from strategy directly to deployment, skipping the step that makes deployment possible: understanding your current cultural readiness. Every organization has a different starting point. Knowing yours is not optional, it is the foundation of everything that follows.

We use a **three-lens diagnostic framework** to help leaders map their cultural strengths and vulnerabilities across the domains where AI transformation plays out most visibly:

TEAMS	BOARDROOM	OPERATIONS
• Do staff feel safe saying “I don’t know how to use AI yet”? • Are people experimenting—or waiting for permission? • Is there fear that AI will replace roles?	• Does the board understand AI’s role in your strategy? • Are governance structures agile enough for AI-era speed? • Is AI on the strategic agenda—or still ‘emerging’?	• Are processes designed to enable or block experimentation? • Who owns AI adoption decisions? • Are quick wins being celebrated and shared?



BEFORE YOU REDESIGN ANYTHING, ASK: WHAT'S THE REAL PROBLEM **WE KEEP STEPPING AROUND?**

Rate your organization honestly on each dimension—1 (low readiness) to 5 (high readiness). Where you score highest, you have cultural assets to build on. Where you score lowest, you have blockers to move before deployment can succeed.

The goal of this diagnostic is not judgment. It is sight. Because we cannot lead what we cannot see, and we cannot move what we refuse to acknowledge.

MARKING YOUR TRANSFORMATION: *MILESTONES THAT MATTER*

Culture transformation is invisible until it isn't.

Unlike technology deployment, which comes with version numbers and launch dates, cultural change accumulates quietly—in a conversation that went differently than it would have six months ago, in a team member who raised a concern instead of staying silent, in a board meeting where curiosity replaced defensiveness.

This invisibility is one of the reasons transformation efforts stall.

Leaders cannot sustain what they cannot see. Boards cannot support what they cannot measure. Staff cannot celebrate what they cannot name.

The milestones below give you language for what AI-ready culture transformation actually looks like across time—not in technology metrics, but in the human behaviors that tell you whether real change is taking hold.



PHASE	MILESTONE INDICATOR	WHAT TO LISTEN FOR
Days 1–30	Blockers Named	People begin to name problems they previously avoided. Conversations shift from “that’s how we’ve always done it” to “I’ve been wondering why we do it this way.” The first honest AI conversation happens in a team meeting.
Days 30–60	Questions Replace Silence	Staff are asking questions about AI without waiting to be told it’s safe. “I don’t know yet” becomes an acceptable leadership phrase. At least one experiment is underway with a clear owner and a defined learning goal.
Days 60–90	Learning Is Celebrated Publicly	A failed experiment is shared openly and treated as an asset. A middle leader surfaces a concern upward without fear. Cross-departmental conversations about AI are happening without being mandated.
Months 3–6	Trust Is Visible In Behavior	Staff proactively share AI ideas rather than waiting for direction. Board meetings include an AI update as a standard agenda item. New staff describe the culture as “curious and open.”

PHASE	MILESTONE INDICATOR	WHAT TO LISTEN FOR
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Months 6–12	Transformation Is In The Story	Leaders can name specific decisions that were made differently because of H.E.A.R.T. principles. Members report improved experiences that trace back to an AI-supported process. The organization is recruiting and retaining talent in part because of its AI culture.
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Year 2+	H.E.A.R.T. Is In The System	New leaders are onboarded into the H.E.A.R.T. Powered Leadership™ framework as part of orientation. AI governance is embedded in board policy, not managed ad hoc. The organization is teaching what it has learned—to peers, partners, and the broader sector.
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HOW TO USE THESE MILESTONES

These milestones are not a linear checklist.

Culture does not move in a straight line. You may reach Month 3 behaviors in some parts of your organization and still be in Day 30 territory in others. That is normal. Transformation is uneven because organizations are made up of people—and people move at different paces for different reasons.

Use these milestones in three ways:

REPORT ON CULTURAL MILESTONES:

As a board communication tool.

Most boards measure AI transformation through technology metrics. Introducing cultural milestones alongside operational ones changes the conversation and makes the human dimension of transformation visible and strategically relevant.

REVISIT THEM QUARTERLY:

As a leadership team touchstone.

At the start of each quarter, ask your leadership team: Which of these milestones are we seeing evidence of? Which ones feel furthest away? What one thing could we do this quarter to move one milestone forward?

MEASURE YOUR OWN H.E.A.R.T. GROWTH:

As a personal benchmark.

Each milestone maps back to one of the H.E.A.R.T. pillars. Blockers Named = Humanize. Questions Replace Silence = Empower. Learning Celebrated = Ascend. Trust Visible = Reimagine. Transformation in the Story = Transform. Your personal leadership growth and your organization's cultural growth are not separate journeys; they are the same one.



**TRANSFORMATION IS
NOT AN EVENT. IT IS AN
ACCUMULATION OF
SMALL, COURAGEOUS
DECISIONS— VISIBLE
ONLY WHEN YOU KNOW
WHAT TO LOOK FOR.**

A re:members PERSPECTIVE:

PAIR EACH PHASE WITH A MEMBER INDICATOR.

Every milestone above is measured in internal terms—staff asking questions, leaders modeling curiosity, board agenda items.

re:Members recommends mapping each phase to a corresponding member-engagement indicator so the board sees both halves of the story:

Days 30–60 (Questions Replace Silence), member response times improve as staff experiment with AI-assisted outreach;

Months 3–6 (Trust Is Visible in Behavior), personalization in member communications increases measurably;

Months 6–12 (Transformation Is in the Story), retention rates begin to reflect the improved member experience.

YOUR 30-DAY AI-READY CULTURE ACTION PLAN

The most dangerous thing you can do with this content is leave having learned something and do nothing with it. Transformation is not built in a white paper. It is built in the thirty days that follow reading one.

Here is a focused 30-day action plan built on the H.E.A.R.T. framework:

WEEK 1: HUMANIZE

See What Is There

- Complete the three-lens Culture Diagnostic (Teams, Boardroom, Operations)
- Have one honest AI conversation with a staff member you have been avoiding
- Identify the single most significant cultural blocker your organization is currently tripping over
- Write your P.I.R.N. message: draft four sentences—one for each element

WEEK 2: EMPOWER & REIMAGINE

Distribute Trust

- Identify one AI-related decision you can move closer to the staff who will be most affected
- Hold a team conversation about AI that begins with listening, not announcing
- Ask your board: “What would we need to believe in order to move faster on this?”
- Question one governance process that was designed for a world AI has already changed

WEEK 3: ASCEND

Design Your First Experiment

- Define one small AI experiment: a clear question, an owner, a two-week timeframe, one success measure
- Explicitly give your team permission to try something without needing approval first
- Share what you are learning publicly—model curiosity by modeling transparency
- Celebrate one learning moment, whether the experiment “succeeded” or not

WEEK 4: TRANSFORM

Commit to the Shift

- Identify which H.E.A.R.T. pillar is your strongest and which is your greatest growth edge
- Name one leadership behavior you are committing to stop (control, false certainty, or over-planning)
- Find one accountability partner—inside or outside your organization—for a 30-day check-in
- Schedule your next culture diagnostic for 90 days out to measure movement

REMEMBER: *Progress Beats Perfection*

The organizations building AI-ready cultures are not the ones waiting until everything is figured out. They are the ones running one experiment, having one honest conversation, and making one trust-building decision at a time.
Start where you are. Move one blocker.

CONCLUSION: THE CULTURE IS THE STRATEGY

Every association and nonprofit leader we speak with understands that AI is not going away.

The more pressing and honest question is: when AI adoption stalls in your organization, what will the reason be?

If our combined experience across hundreds of transformation engagements has taught us anything, it is this: the limiting factor is almost never the technology. It is the culture. It is the unexamined blocker beneath the strategy. It is the leader who has not yet found the courage to see it, name it, and move it.

An AI-ready culture is not built in a single initiative or a single year. It is built the way all durable cultures are built—through consistent, small, courageous leadership decisions, compounded over time. Through leaders who choose to humanize before they optimize. Who choose to empower before they control. Who choose to experiment before they plan their way to perfection. Who reimagine before they execute. And who are willing to transform themselves before they ask anything of their organizations.

The H.E.A.R.T. Powered Leadership™ framework is not a destination. It is a practice. A daily commitment to the kind of leadership that puts people first—not because it is the soft thing to do, but because it is the strategic imperative of our time.

Your AI transformation begins not when you deploy the right tool. ***It begins when you confront the blocker, look at what is beneath it, and decide you are willing to lead your people through what you find.***

And remember why this work matters in the end.

An AI-ready culture is not only good for your people—it is what your members will feel.

The trust you build internally becomes the responsiveness members experience.

The experimentation you protect becomes the personalization they notice.

The culture you lead becomes, ultimately, the engagement, retention, and growth that sustain your mission.

Humanize before you optimize, and your members will be the first to know you did.



**TRANSFORMATION IS
BUILT IN DAILY
LEADERSHIP DECISIONS
—STARTING THIS WEEK.**

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As Founder and CEO of .orgSource, Sherry has helped guide hundreds of associations and nonprofits through growth, disruption, and the rapidly changing landscape of technology.

Her expertise bridges the gap between strategy and humanity, offering practical pathways for leaders who want to stay relevant, resilient, and human in the digital age. Following the sudden loss of her husband, Sherry channeled her experience into growth and co-created the H.E.A.R.T. Powered Leadership™ framework.

A top keynote speaker and podcast host, she is the co-author of RUG: How to Move What You're Tripping Over and Lead with H.E.A.R.T. (2025) and the Association 4.0® series.



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Kevin G. Ordoñez is a nationally recognized thought leader in digital transformation, technology strategy, and association governance.

As President and Managing Director of .orgSource and Co-Founder of .orgCommunity, Kevin has partnered with Sherry for more than 20 years to help mission-driven organizations align leadership, culture, and systems to accelerate innovation and sustainable growth.

Kevin brings decades of experience helping associations modernize, embrace digital innovation, and build the governance structures required for AI-era speed.

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ABOUT .ORGSOURCE

Trusted by 350+ Organizations

.orgSource is a consulting firm dedicated to helping associations and nonprofits navigate transformation, embrace technology, and build people-centered cultures built for the future.

With more than 25 years of experience across hundreds of client engagements, .orgSource partners with leaders who want to move faster, lead smarter, and build organizations that endure.

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ABOUT re:members

formerly Impexium

Smarter, Simpler Membership Management

re:Members is redefining what it means to lead associations and nonprofits into the AI era — not as a technology vendor, but as the thought partner helping organizations turn member data into insight, and insight into growth. We believe, as this paper argues, that the organizations that win with AI won't be the ones with the most tools. They'll be the ones whose culture is ready to use them — and re:Members builds the platform and the strategy that make that readiness measurable.

Our platform and advisory teams partner with leadership across the full member lifecycle — acquisition, onboarding, engagement, and renewal — unifying engagement data, personalizing member communications, and surfacing the signals that predict retention before a member ever has to say they're leaving. This is what AI-driven membership management looks like in practice: not automation for its own sake, but the data and methodology that let associations act on what members experience, not just what staff assume.

That is the line re:Members has staked out as a thought leader in this space: Trust, Communication, and Experimentation aren't just internal culture conditions — they're measurable in member behavior, and we've built our platform to prove it. Renewal rates that hold or climb. Engagement scores that rise. Response times that shrink. An AI-ready culture isn't an abstraction to re:Members; it's a data set we help our partners build, watch, and act on — turning the H.E.A.R.T. Powered Leadership™ principles in this paper into the stronger relationships, sustainable growth, and durable member trust that are the real payoff of getting AI right.

Let us show you what's possible with

re:members
Because It's All About Your Members

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