

AI Readiness Checklist

Executive directors, team leads, and pilot owners

Before your first pilot

Write Y, N, or ? beside every statement. Resolve unknowns before they affect the exercise.

People and purpose

- 01 ☐ We have named a pilot owner.
- 02 ☐ We have chosen one specific task.
- 03 ☐ A reviewer knows the work and can check the result.
- 04 ☐ We have defined the intended benefit.

Tools and data

- 05 ☐ The specific tool and account are approved.
- 06 ☐ We know which data types are permitted.
- 07 ☐ We know which information must stay out.
- 08 ☐ We know whom to contact if something goes wrong.

Use this checklist

This is a planning aid, not a validated score or compliance assessment. Tool approval, permitted data, a reviewer, and a reporting contact are prerequisites. A high Yes count cannot replace any of them.

Your pilot

Organization: _____
Owner: _____ Date: _____
Task: _____
Reviewer: _____

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Readiness in practice

Continue the same Y, N, or ? notation.

Skills and review

- 09 [] Staff know AI output can be inaccurate.
- 10 [] Staff can spot invented facts and citations.
- 11 [] Staff verify dates, numbers, and claims.
- 12 [] Reviewers have enough time to correct drafts.

Audience and safeguards

- 13 [] We know who will read or use the result.
- 14 [] We considered disability access and plain language.
- 15 [] The pilot avoids consequential decisions about people.
- 16 [] We can stop or reverse the exercise.

Evidence and follow-through

- 17 [] We have a baseline for the current task.
- 18 [] We will record preparation, drafting, and review time.
- 19 [] We will record errors and corrections.
- 20 [] We scheduled a keep, change, or stop review.

Interpret your answers

Yes means you can point to evidence. No means action is needed. Unsure means someone must investigate. Use the next page to assign work. Keep the first exercise limited to approved public or fictional material.

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Turn gaps into action

Complete one entry for each important No or Unsure answer.

Action record

Checklist item: _____

What is missing: _____

Required action: _____

Owner: _____ Due date: _____

Evidence of completion: _____

Worked example: fictional nonprofit

Item 05 is Unsure. The team uses personal AI accounts but has no approved work account. Action: ask the designated IT owner to assess the proposed tool and permitted use. Until approval, run a paper exercise with fictional inputs. Do not treat this workaround as approval to upload work records.

Pilot authorization record

Approved tool/account: _____

Allowed source material: _____

Reviewer and reporting contact: _____

Scope and limits: _____

Decision: ☐ Proceed within scope ☐ Hold

Decision owner/date: _____

Next step

Use the Starter Kit for your first exercise, or the Staff AI Training Curriculum to prepare the team. Revisit this checklist when the tool, data, audience, or workflow changes.