



Great Lakes AI
INSTITUTE

FREE RESOURCE · SELF-ASSESSMENT

AI Readiness Checklist

for Small and Mid-Sized Organizations

A practical self-assessment for leaders who want to move from AI curiosity to responsible, useful adoption.



CORE PRINCIPLE

Do not start with the tool. Start with the work.

BEFORE YOU BEGIN

How to Use This Checklist

AI can create real value, but only when it is connected to real work, clear judgment, and responsible boundaries. Use this checklist to assess where your organization stands today and identify practical next steps for the next 30 days.

For each item, mark **Yes**, **Partial**, or **No**. Then choose one to three practical actions for the next 30 days.

RESPONSE	MEANING
Yes	We have this in place.
Partial	We have started, but it is inconsistent or unclear.
No	We have not addressed this yet.

What This Checklist Helps You See

- ✓ Whether leaders are aligned on why AI matters.
- ✓ Whether staff are already using AI safely or informally.
- ✓ Which workflows may be ready for practical AI support.
- ✓ Where data, privacy, and quality risks need stronger boundaries.
- ✓ What training and review standards your team needs next.

BOTTOM LINE

Do not start with the tool. Start with the work.

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1 Leadership Alignment

READINESS ITEM	YES	PARTIAL	NO
Our leadership team has discussed why AI matters to our organization.	☐	☐	☐
We have identified practical problems AI might help solve.	☐	☐	☐
We agree that AI adoption should improve real work, not just increase tool usage.	☐	☐	☐
We have discussed where AI should not be used without strong human review.	☐	☐	☐
We have someone responsible for helping guide AI adoption internally.	☐	☐	☐

REFLECTION QUESTION

What is the clearest business or mission problem AI might help us address?

2 Current Staff AI Usage

READINESS ITEM	YES	PARTIAL	NO
We know whether staff are already using AI tools at work.	☐	☐	☐
Staff understand what kinds of information should not be entered into public AI tools.	☐	☐	☐
We have discussed acceptable and unacceptable AI use.	☐	☐	☐
Staff have a safe way to ask questions about AI use.	☐	☐	☐
We are not relying on informal, hidden, or unapproved AI use.	☐	☐	☐

REFLECTION QUESTION

Where do we suspect staff may already be using AI, officially or unofficially?

3 Workflow Opportunities

READINESS ITEM	YES	PARTIAL	NO
We have identified repetitive work that consumes staff time.	☐	☐	☐
We know which reports, summaries, emails, or documents take too long to produce.	☐	☐	☐
We have identified communication bottlenecks.	☐	☐	☐
We know where important knowledge is trapped in one person's head.	☐	☐	☐
We have selected at least one low-risk workflow where AI could be tested.	☐	☐	☐

Common AI-Supported Workflow Examples

Meeting summaries and action items

Board or leadership reports

Donor, customer, member, or parent communication

Grant or proposal drafts

Policy summaries

Internal documentation

Training materials

Sales follow-up

Financial narrative explanations

REFLECTION QUESTION

What is one recurring workflow that is slow, frustrating, inconsistent, or overly manual?



4 Data and Privacy Risk

READINESS ITEM	YES	PARTIAL	NO
We have defined what information is sensitive or confidential.	☐	☐	☐
Staff know not to enter sensitive personal, financial, legal, HR, student, donor, client, or health information into unapproved tools.	☐	☐	☐
We understand which AI tools our organization has approved, if any.	☐	☐	☐
We have considered privacy, confidentiality, and data retention concerns.	☐	☐	☐
We have a process for reviewing higher-risk AI use cases before staff use them.	☐	☐	☐

REFLECTION QUESTION

What type of information would create the greatest risk if mishandled?

NOTES

5 Human Review Standards

READINESS ITEM	YES	PARTIAL	NO
Staff understand that AI output must be reviewed before use.	☐	☐	☐
We have clear review expectations for public-facing content.	☐	☐	☐
We require expert review for high-risk areas such as legal, financial, HR, medical, compliance, or cybersecurity decisions.	☐	☐	☐
We know who owns the final decision when AI assists with a task.	☐	☐	☐
We have discussed how to check AI output for accuracy, tone, bias, and completeness.	☐	☐	☐

Simple Review Rule

The higher the risk, the stronger the review required.

RISK LEVEL	EXAMPLES	REVIEW STANDARD
Low	Brainstorming, outlines, internal drafts	Light human review
Medium	Customer communication, donor updates, board reports, public content	Manager or responsible staff approval
High	Legal, financial, HR, medical, compliance, cybersecurity, sensitive data	Expert review required

REFLECTION QUESTION

Where would AI output create real risk if it were wrong?

6 Training Needs

READINESS ITEM	YES	PARTIAL	NO
Staff understand the basics of what AI can and cannot do.	☐	☐	☐
Staff know how to give AI useful context, not just short prompts.	☐	☐	☐
Staff know how to iterate, challenge, and refine AI output.	☐	☐	☐
Managers know how to supervise AI-supported work.	☐	☐	☐
We have identified which teams or roles need training first.	☐	☐	☐

Three Types of AI Fluency

Workflow fluency Can the organization redesign real work around AI?

Cognitive fluency Can people think with AI, provide context, iterate, and review?

Mechanical fluency Can people operate the tool?

REFLECTION QUESTION

Who needs AI training first, and what kind of training would be most useful?

7 First 30-Day Priorities

Use your answers above to choose your first practical moves. Select only the actions that matter most right now.

☐ Discuss AI goals with leadership.☐ Ask staff how they are currently using AI.☐ Identify 5 to 10 possible AI use cases.☐ Select one low-risk workflow to test.☐ Create basic AI usage guidelines.☐ Define sensitive data rules.☐ Set human review standards.☐ Schedule practical AI training.☐ Create a use case inventory.☐ Run one workflow redesign exercise.

Our Top Three Priorities

1. _____
2. _____
3. _____

Simple Scoring Guide

Mostly Yes

You likely have a good foundation. Focus on workflow redesign and measurement.

Mostly Partial

You are in the normal middle zone. Clarify rules, train staff, and choose a practical first use case.

Mostly No

Start with leadership alignment, basic AI literacy, and safe usage guidelines before pushing adoption.

NOTES

WHERE TO GO FROM HERE

Recommended Next Step

Pick one recurring workflow and use the questions below to turn AI curiosity into a concrete, low-risk experiment.

1 What is the current pain?

2 What could AI draft, summarize, organize, or analyze?

3 What risk is involved?

4 Who reviews the output?

5 Who owns the final decision?

6 How will we know if the work improved?

The goal is not more AI usage. The goal is better work.

Want help applying this checklist?

Great Lakes AI Institute helps leaders and teams identify practical AI opportunities, create safe boundaries, and redesign workflows so AI creates useful capacity without unnecessary risk.

[Schedule an AI Reality Check](#)

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