

EXECUTIVE CHECKLIST

20 decisions that show whether
your club is ready to govern and
test AI.

A practical conversation starter for general managers, boards, HR and operations leaders.

Prepared by Evan Sherwood, CCM, CCE

How to use it

Complete the checklist with the executive sponsor and the people responsible for policy, operations, HR, IT and specialist review. Answer for the club as it operates today - not for the process leadership intends to build later. This is an executive conversation starter, not a legal opinion, cybersecurity assessment, compliance certification or guarantee that a tool or use case is risk-free.

YES	2 points	The practice is documented, understood and in use.
PARTLY	1 point	Some elements exist, but ownership or consistency is incomplete.
NO / NOT SURE	0 points	Treat the item as an open leadership decision.

01 Leadership and ownership

Begin with who makes the decisions. Policy and tool choices drift when ownership is implied rather than named.

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|----|--|------------------------------|---------------------------------|-----------------------------|-----------------------------------|
| 01 | A named executive sponsor is accountable for AI-related decisions. | ☐ Yes | ☐ Partly | ☐ No | ☐ Not sure |
| 02 | One person or group approves new tools, accounts, vendors and use cases. | ☐ Yes | ☐ Partly | ☐ No | ☐ Not sure |
| 03 | Leadership can state which operating problems AI is expected to help solve. | ☐ Yes | ☐ Partly | ☐ No | ☐ Not sure |
| 04 | The board or ownership group knows how material AI decisions will be reported. | ☐ Yes | ☐ Partly | ☐ No | ☐ Not sure |

SECTION SCORE

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Leadership
prompt

Who can say “yes,” “not yet” or “stop” when a new AI feature, vendor or use case appears?

02 Current use and tool control

A club cannot govern what it has not mapped. Look for actual tools, accounts, vendor features and staff habits.

05 The club has documented which AI tools and features staff currently use. ☐ Yes ☐ Partly ☐ No ☐ Not sure

06 Staff use club-approved accounts rather than unmanaged personal accounts for club work. ☐ Yes ☐ Partly ☐ No ☐ Not sure

07 New AI features from existing vendors receive an operating and data review before adoption. ☐ Yes ☐ Partly ☐ No ☐ Not sure

08 The club can disable, replace or exit an AI tool without losing essential information or control. ☐ Yes ☐ Partly ☐ No ☐ Not sure

SECTION SCORE

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Useful evidence

A current-use inventory should name the tool, account owner, purpose, information used and person reviewing the output.

03 Information and boundaries

The most useful rule is the one staff can apply before they paste, upload or share information.

09	The club has a plain-language guide for public, internal, confidential and restricted information.	☐ Yes	☐ Partly	☐ No	☐ Not sure
10	Staff know what information must not be entered into public or unapproved AI tools.	☐ Yes	☐ Partly	☐ No	☐ Not sure
11	Credentials, payment details, biometric data and other restricted information are prohibited by default.	☐ Yes	☐ Partly	☐ No	☐ Not sure
12	Higher-risk uses involving members, employees, health, finance or consequential decisions require specialist review.	☐ Yes	☐ Partly	☐ No	☐ Not sure

SECTION SCORE _____ / 8

Default boundary	When the information is sensitive or the decision affects a member or employee, defer until the appropriate specialist and executive owner have reviewed the use.
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04 People and accountability

AI may support defined tasks. A person remains responsible for the message, decision and result.

I3	Staff have role-specific guidance rather than a generic AI awareness presentation.	☐ Yes	☐ Partly	☐ No	☐ Not sure
I4	Every approved use has a named human owner who reviews the result before it is used.	☐ Yes	☐ Partly	☐ No	☐ Not sure
I5	The club has a simple way to report errors, questionable outputs or accidental data sharing.	☐ Yes	☐ Partly	☐ No	☐ Not sure
I6	Training, policies and approved-use guidance are reviewed when tools or roles change.	☐ Yes	☐ Partly	☐ No	☐ Not sure

SECTION SCORE / 8

Human review

Review must be specific: who checks the result, what they verify and who remains accountable after the result is used.

05 Pilot and evidence readiness

A worthwhile pilot solves a real problem, uses approved information and can be measured against the current way of working.

I7 Leadership can identify one bounded workflow where less time or better consistency would matter. ☐ Yes ☐ Partly ☐ No ☐ Not sure

I8 The current way of doing that work is documented well enough to create a baseline. ☐ Yes ☐ Partly ☐ No ☐ Not sure

I9 A pilot would use approved information, remain reversible and have a named staff owner. ☐ Yes ☐ Partly ☐ No ☐ Not sure

20 Leadership has agreed on the evidence required to continue, change or stop the pilot. ☐ Yes ☐ Partly ☐ No ☐ Not sure

SECTION SCORE

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Do not broaden the investment until the workflow is useful, reviewable and worth sustaining.

Readiness scorecard

Add the five section scores. Use the result to identify the next leadership conversation - not to certify the club.

Leadership and ownership		/ 8
Current use and tool control		/ 8
Information and boundaries		/ 8
People and accountability		/ 8
Pilot and evidence readiness		/ 8
TOTAL		/ 40

32-40	Strong foundation. Leadership has many core decisions in place. Focus on closing the lowest-scoring section and confirming a bounded pilot with measurable evidence.
20-31	Important gaps remain. The club may be ready for selected use, but ownership, boundaries or evidence should be strengthened before broader adoption.
0-19	Start with the operating standard. Prioritize a structured readiness review before approving more tools or expanding informal staff use.

The three decisions to make next

01 _____

02 _____

03 _____

A practical first 90 days

Use the lowest-scoring sections to shape the sequence. Do not treat every gap as a technology purchase.

O1	Map the current state Document tools, accounts, informal use, information categories, owners and operational pressure.
O2	Set the operating rules Name ownership, approved tools, data boundaries, human review, escalation and specialist-review points.
O3	Choose one useful next step Select a bounded, reversible workflow with approved information, a named owner and a measurable baseline.
O4	Review before expanding Record results, errors, corrections and staff effort. Decide what should continue, change or stop.

ABOUT THE AUTHOR

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Evan is the founder of House & Roster and a private-club operator with more than 20 years of leadership experience. He earned the CCM designation and stepped into his first general manager role at age 29.

[Explore the AI Readiness & Governance Review](#)

Framework note: Informed by the House Standard, NIST AI RMF and NIST Generative AI Profile. This does not represent certification or guaranteed compliance.