EXECUTIVE AI READINESS CHECKLIST

20 decisions that show whether your club is ready to use AI with confidence.

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 your general manager and the people responsible for operations, HR and IT. Answer for the club as it operates today. Use the results to agree on practical next steps. This self-assessment is not a legal opinion, cybersecurity assessment or compliance certification.

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.

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 _____ **/ 8**

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 _____ **/ 8**

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.

04 People and accountability

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

13	Staff have role-specific guidance rather than a generic AI awareness presentation.	☐ Yes	☐ Partly	☐ No	☐ Not sure
14	Every approved use has a named human owner who reviews the result before it is used.	☐ Yes	☐ Partly	☐ No	☐ Not sure
15	The club has a simple way to report errors, questionable outputs or accidental data sharing.	☐ Yes	☐ Partly	☐ No	☐ Not sure
16	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 Practical use and follow-through

Start with work your team repeats. Use approved information, check the results and decide what is worth continuing.

17	Leadership has chosen three recurring tasks where AI could save time or improve consistency.	☐ Yes	☐ Partly	☐ No	☐ Not sure
18	The team can compare time and quality with the current way of completing each task.	☐ Yes	☐ Partly	☐ No	☐ Not sure
19	Each task uses approved information and has a named staff owner and clear review step.	☐ Yes	☐ Partly	☐ No	☐ Not sure
20	A follow-up is planned to review results, answer staff questions and adjust the approach.	☐ Yes	☐ Partly	☐ No	☐ Not sure

SECTION SCORE _____ / 8

Working rule

Keep the work useful, the rules clear and a person responsible for every result.

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
Practical use and follow-through		/ 8
TOTAL		**/ 40**

32–40	**A strong foundation.** Close any remaining gaps, confirm staff confidence and put useful recurring tasks into regular, reviewed use.
20–31	**Strengthen the essentials.** Clarify approved accounts, information rules and review responsibilities. Build consistent habits through practical staff training.
0–19	**Start with the basics.** Name a lead, agree on an approved tool and information rules, then prepare your team before broadening use.

The three decisions to make next

01 _____

02 _____

03 _____

From checklist to everyday use

Use your lowest-scoring sections to focus the conversation and decide what your team needs next.

HOUSE & ROSTER

Club AI Setup & Training

One club. One primary workplace AI tool.
Up to 10 management and administrative participants.

Approximately 30 days, subject to readiness, scheduling and required approvals.

01	**Rules your team can use** A tailored draft AI policy and staff guide, with clear information rules and human review responsibilities.
02	**Guidance for your workplace setup** Approved-tool, account and access decisions coordinated with your IT provider.
03	**Practice with everyday club work** 8-12 practical club examples, live training and a working session on three recurring tasks.
04	**Follow-up and adjustments** Review staff questions and results, resolve practical issues and refine the approach.

Your club owns the accounts and final decisions. Your IT provider configures the tools. Counsel reviews policy language as appropriate.

ABOUT THE AUTHOR

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Founder of House & Roster, with more than 20 years of private-club leadership experience.

Discuss Your Club's AI Setup

Contact us to discuss fit, timing and pricing. Periodic refreshers are optional.

houseandroster.com/#contact

Framework note: Informed by NIST AI RMF and NIST Generative AI Profile. This self-assessment does not represent certification or guaranteed compliance.