

AI Enablement Council Charter

Form the council with a short written charter, one to two pages. A committee can make decisions, but an individual must own execution — name the sponsor and the accountable lead first.



USE WHEN Weeks 1–2, after naming the sponsor and enablement lead, before the council's first meeting.

OUTPUT A signed AI Enablement Council charter and interim acceptable-use guidance.

A NAMED OWNERSHIP

Executive sponsor Name and title. Budget authority or strong influence over it (CEO, COO, CFO, CIO).	Accountable enablement lead Name and protected time per week. An individual must own execution between meetings.
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1 MEMBERS AND FUNCTIONS REPRESENTED

Role	Name	Function represented	What they own
Executive sponsor			Resolving conflicts, connecting the work to organizational priorities, funding decisions
AI enablement lead			Running the program, managing the use-case portfolio, accountability between meetings
IT / security representative			Provisioning, access, integrations, technical support
Frontline workflow representative			Reality-testing whether proposed solutions are useful, usable, and realistic

Larger or regulated organizations add: HR / L&D · legal, privacy, compliance, or risk · finance or procurement · data or analytics · operational leaders who own priority workflows.

2 SCOPE AND BUSINESS OUTCOMES

Scope What work the council governs — and what it does not.	Business outcomes the work serves The organizational priorities this program must advance.
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3 DECISION RIGHTS

Council decides	Council recommends	Council delegates
<i>e.g., approving tools and use cases; selecting and funding pilots; deciding whether pilots scale, change, or stop</i>	<i>e.g., budget beyond the envelope and organization-level policy — to the executive sponsor</i>	<i>e.g., detailed technical, security, legal, and workflow evaluations — the council decides; specialists assess</i>

AI Enablement Council Charter

Continued — budget authority, intake, risk pathways, cadence, 90-day deliverables, measures of success, and signatures. Gate 1 closes the Organize phase.



4 BUDGET AND CADENCE

Budget authority What the council may spend without further approval; the envelope for the first 90 days.	Meeting cadence <i>First 90 days: core council every two weeks; pilot teams may meet weekly. Once the operating model stabilizes: monthly.</i>
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5 INTAKE AND RISK PATHWAYS

Use-case intake process How any employee nominates a tool or use case, and what happens to a nomination next.	Risk and approval pathways The risk-tiering process, who approves at each tier, and how issues escalate.
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6 INITIAL 90-DAY DELIVERABLES

#	Deliverable	Owner	Due
E	Inventory current AI use, including unofficial or "shadow" use	Enablement lead	Week 4
1			
2			
3			
4			

7 MEASURES OF SUCCESS

<i>How the sponsor will know in 90 days that the council is working — e.g., charter signed, interim guidance published to all staff, baseline fielded above 60% response, two or three pilots chartered with baselines.</i>

8 SIGNATURES

Executive sponsor — signature	Date	Enablement lead — signature	Date

GATE 1 — Charter

The executive sponsor approves the charter, the named lead, a budget envelope for the first 90 days, and the interim acceptable-use guidance. Nothing else in this playbook proceeds without this signature.

YOU SHOULD NOW HAVE

☐ Named sponsor

☐ Accountable lead

☐ IT + frontline seated

☐ Charter signed

☐ Interim guidance published

Council Membership Worksheet

Seat the minimum viable council, decide which expanded roles your size or regulatory context requires, and put an owner and a date on each of the council's nine first assignments.



USE WHEN Recruiting the minimum viable council — after the sponsor and lead are named, before the first meeting.

OUTPUT A seated council with named people, protected time, and owned first assignments.

1 MINIMUM VIABLE COUNCIL

Role	What they bring	What they own	Name	Protected time / week
Executive sponsor	Budget authority or strong influence over it (CEO, COO, CFO, CIO)	Resolving conflicts, connecting the work to organizational priorities, funding decisions		
AI enablement lead	Program management capacity and standing to coordinate across functions	Running the program, managing the use-case portfolio, accountability between meetings		
IT / security representative	Knowledge of systems, identity, data protection, and vendor technical evaluation	Provisioning, access, integrations, technical support		
Frontline workflow representative	Deep knowledge of how the work actually happens	Reality-testing whether proposed solutions are useful, usable, and realistic		

2 EXPANDED COUNCIL — LARGER OR REGULATED ORGANIZATIONS

Needed?	Role	What they cover	Who?
☐	HR / learning and development	Role changes, training, communication, adoption	
☐	Legal, privacy, compliance, or risk	Risk classification, contracts, acceptable use, regulated data, escalation	
☐	Finance or procurement	Business cases, vendor contracts, budget discipline, benefits validation	
☐	Data or analytics	Data availability, quality, permissions, measurement	
☐	Operational leaders	From the functions that own priority workflows	

3 THE COUNCIL'S FIRST ASSIGNMENTS

✓	#	Assignment	Owner	Due
☐	1	Inventory current AI use, including unofficial or "shadow" use		
☐	2	Establish interim acceptable-use guidance — enough to make experimentation safe, not a final policy		
☐	3	Identify important workflows and organizational pain points		
☐	4	Define a simple risk-tiering process		
☐	5	Select two or three pilot workflows		
☐	6	Assign each pilot an owner, users, a baseline, and success measures		
☐	7	Determine what tools, data, training, and approvals each pilot requires		
☐	8	Establish a feedback and support mechanism		
☐	9	Review results and decide what should scale		

Do not begin with a comprehensive AI policy or licenses for everyone — these nine generate the information every later decision depends on.

YOU SHOULD NOW HAVE ☐ Named sponsor ☐ Accountable lead ☐ IT + frontline seated ☐ Charter signed ☐ Interim guidance published

Decision-Rights Matrix

One committee should not be asked to do everything. Give each group a distinct job, real names, and a written boundary — champions inform adoption; the council decides.



USE WHEN Filling in the four-group table with real names, immediately after the charter is signed.

OUTPUT A participation structure map with named people and decision boundaries.

1 FOUR GROUPS, FOUR DISTINCT JOBS

Group	Purpose	Named people	May decide	May NOT decide
Executive sponsor	Authority, budget, organizational alignment			
AI Enablement Council	Prioritization, governance, investment, measurement			
Implementation teams	Build and deploy specific workflows			
AI champions network	Peer learning, feedback, demonstrations, adoption			Champions do not approve tools, set policy, or accept organizational risk

Invite champions by asking department heads for their most curious people, not their most senior.

2 NAME THE EMPLOYEE-FACING GROUP WITH CARE

Naming note Call it an AI champions network or AI community of practice , not an employee resource group — ERGs conventionally refer to employee-led affinity and identity groups, and borrowing the term creates confusion for HR.	Our name for this group The name staff will actually see.	Champions invited from Departments represented — aim for at least three.
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3 ONE-SENTENCE DECISION BOUNDARIES

Group	One sentence: what this group may — and may not — decide
Executive sponsor	
AI Enablement Council	
Implementation teams	
AI champions network	

YOU SHOULD NOW HAVE ☐ Champions from 3+ departments ☐ Written decision boundaries ☐ No group assigned another's work

AI Literacy & Readiness Survey

Establish where the organization actually is before prescribing training, buying more tools, or selecting pilots — and distinguish literacy, adoption, and readiness, because the intervention differs in each case.



USE WHEN Before prescribing training, buying more tools, or selecting pilots — fielded to the whole organization.

OUTPUT A fielded survey and raw response set, segmentable by department and role.

1 THREE CONSTRUCTS — DO NOT CONFLATE THEM

Literacy What people understand about AI, its limitations, and responsible use.	Adoption How people are currently using AI in real work.	Readiness Whether tools, policies, leadership, workflows, and support make productive use possible.
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An organization can score high on one and low on the others — and the intervention differs in each case.

2 SEVEN DIMENSIONS TO MEASURE

☐ Awareness Available AI capabilities and common limitations.	☐ Current use Tools, frequency, tasks; approved or informal.	☐ Practical capability Apply AI to workflows, evaluate outputs, keep oversight.	☐ Risk judgment Privacy, confidential data, IP, bias, accuracy, escalation.
☐ Confidence + willingness Comfort experimenting; fear of displacement or surveillance.	☐ Access + support Approved tools, data access, policies, manager encouragement.	☐ Workflow opportunity Repetitive tasks, bottlenecks, burdens AI might improve.	Cover all seven. Supplement the survey with departmental interviews or focus groups.

3 SAMPLE SCALED ITEMS — FIVE-POINT AGREEMENT SCALE

#	Item	1	2	3	4	5
1	I understand what generative AI can and cannot do.	○	○	○	○	○
2	I know which AI tools I am permitted to use at work.	○	○	○	○	○
3	I know what organizational information I may enter into an AI system.	○	○	○	○	○
4	I can identify tasks in my role where AI may be useful.	○	○	○	○	○
5	I feel capable of reviewing AI output for errors or unsupported claims.	○	○	○	○	○
6	I currently use AI for work at least once per week.	○	○	○	○	○
7	My manager encourages responsible experimentation with AI.	○	○	○	○	○
8	I know where to go when I have an AI-related question.	○	○	○	○	○
9	I am concerned that using AI may negatively affect how my work is evaluated.	○	○	○	○	○
10	I have repetitive or time-consuming tasks that may benefit from AI assistance.	○	○	○	○	○

1 = strongly disagree · 3 = neutral · 5 = strongly agree

AI Literacy & Readiness Survey

Continued — open-ended items, scenario items that measure judgment rather than confidence, the trust commitments that make honest answers safe, and the fielding plan.



4 OPEN-ENDED ITEMS

Which tasks consume disproportionate time?	Where do handoffs or approvals create delays?
What AI tools are you already using?	What concerns prevent you from using AI?
What would help you feel capable and confident?	What is one workflow you would nominate for exploration?

5 SCENARIO ITEMS — MEASURE JUDGMENT, NOT CONFIDENCE

Scenario 1. An employee wants to paste a confidential client document into a publicly available AI assistant to summarize it faster. What should they do?	Scenario 2 — write one drawn from your organization's own work.
Correct response, and why:	Correct response, and why:

Self-assessed confidence and actual judgment routinely diverge — include at least two scenario items.

6 PROTECT EMPLOYEE TRUST

Trust commitments — stated on the instrument, delivered personally by the sponsor

☐ Not a performance evaluation ☐ Individual responses never shared with managers ☐ No confidential prompts, data, or client information in answers ☐ Purpose is to design tools, training, policies, and support ☐ Findings reported in aggregate

Without these protections the data is worthless: employees conceal unofficial use, and answers drift toward what leadership wants to hear.

7 FIELDING PLAN

Field dates Two weeks in the field.	Reminder date One reminder.	Target response rate Above 60% — below that, segments are too thin to act on.	Trust commitments delivered by The sponsor, personally — not an email signature.
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YOU SHOULD NOW HAVE ☐ Seven dimensions covered ☐ Two+ scenario items ☐ Sponsor-delivered trust commitments ☐ Response rate above 60%

Foundational Training Agenda

The first training is not a tool tutorial. Its purpose is a common organizational vocabulary — delivered in cohort-based sessions, using your organization's real work in every example.



USE WHEN After the baseline is analyzed into learning cohorts, before departmental interviews begin.

OUTPUT Training delivered to all cohorts; a stack of workflow nominations; scenario-based comprehension results.

A COHORT PLAN

Cohort	Audience — segment by baseline cohorts, not one all-staff webinar	Date	Facilitator
1			
2			
3			

1 THE NINE TRAINING TOPICS

#	Topic	Time	Owner	Org-specific example
1	What AI is and is not			
2	What generative AI can and cannot reliably do			
3	The distinction between automation, assistance, and decision-making			
4	Approved tools and data boundaries — what may go into which systems			
5	Human responsibility and oversight — the person remains accountable for the output			
6	The RESPECT principles			
7	Concrete examples of low-, medium-, and high-risk uses drawn from this organization's work			One low-, one medium-, one high-risk example from your own work
8	How employees can nominate a workflow for exploration			
9	Where to go for support or escalation			

The measure of success is not completion rates — it is whether the departmental interviews that follow are productive.

2 WORKFLOW NOMINATION EXERCISE

End every session with a workflow nomination exercise How nominations are captured (card, form), who collects them, and where they go next.

3 COMPREHENSION CHECK — THREE SCENARIOS, NOT A SATISFACTION SURVEY

Scenario 1 A judgment question on a topic above.	Scenario 2 A judgment question on a topic above.	Scenario 3 A judgment question on a topic above.
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🚫 GATE 2 — Baseline

The council formally accepts the baseline report, confirms the learning-cohort plan, and approves the priority departments for 5D interviews. This is where the council commits to where it will look first.

YOU SHOULD NOW HAVE ☐ All cohorts trained ☐ Comprehension above baseline ☐ Nominations collected ☐ Support + escalation paths named

5D Departmental Interview Guide

Examine work — don't ask "where would you like to use AI?" That question invites wish lists. Structure each interview with the 5D framework and leave with a departmental opportunity map.

USE WHEN Interviewing each priority department after shared language is established — bring the department's own baseline profile and walk actual work products, not abstractions.

OUTPUT A structured departmental opportunity map — candidate workflows, friction, constraints, and where AI does not belong.

A INTERVIEW CONTEXT

Department	Interviewer	Participants	Date	Session length 90–120 minutes, scheduled in advance.
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1 THE FIVE DS

Framework step + guiding question	Interview prompts	Notes
1 · Discuss — What actually happens? Listen to the people doing the work. Output: conversation + problem brief.	"Walk me through the last time this work happened, start to finish." · "Which repetitive, high-volume tasks eat the most hours here?"	
2 · Document — Is the workflow accurate? Make actors, decisions, exceptions, inputs, and outputs explicit. Output: validated current-state workflow.	"Who touches this, and what gets handed off where?" · "Where do delayed decisions and manual handoffs stack up?"	
3 · Diagnose — Where are friction and risk? Separate repetition from judgment, agency, privacy, and safety. Output: opportunity + risk map.	"What knowledge is hard to retrieve, and what documentation burdens you?" · "Where is quality inconsistent — and what work depends on a few experienced employees?"	
4 · Design — What should change? Assign human and AI responsibilities. Output: future-state workflow.	"Which customer or employee pain points would you fix first?" · "What must stay human no matter what?"	
5 · Develop — Does it work in practice? Prototype, test with real cases, observe, and refine. Output: tested prototype + evidence.	"What real cases would prove a change works?" · "Which high-stakes activities here may make AI inappropriate?"	

Loop rule: humans validate before the work advances; new evidence returns the team to Discuss.

2 WHERE AI DOES NOT BELONG

Record the department's own words, verbatim — a hard line is a design constraint, not an obstacle.

3 ACCOUNTABLE OUTCOMES

Outcomes the department is accountable for	Candidate workflows for the inventory With friction quantified where possible.
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YOU SHOULD NOW HAVE ☐ Priority departments interviewed ☐ Friction quantified ☐ "Not here" boundaries recorded ☐ Accountable outcomes documented

Workflow Inventory Template

Document one candidate workflow per sheet — purpose, people, systems, decisions, exceptions, handoffs — and the baseline row that leaders skip and later regret.



USE WHEN Completing an inventory entry for every candidate workflow from the 5D opportunity maps — chase down real baseline numbers: timesheets, submission logs, queue counts.

OUTPUT The workflow inventory, with a baseline for every entry.

A WORKFLOW IDENTITY

Workflow name	Owner	Purpose What this workflow exists to produce.
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1 PEOPLE AND FLOW

Participants	Inputs	Outputs	Handoffs Between people, teams, systems.
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2 SYSTEMS, DECISIONS, EXCEPTIONS, PROBLEMS

Systems & data involved	Decisions made within it Where someone exercises judgment.	Exceptions & frequency	Current problems
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3 BASELINE PERFORMANCE — THE ROW LEADERS SKIP AND LATER REGRET

Time	Volume	Quality	Cost
☐ Estimate?	☐ Estimate?	☐ Estimate?	☐ Estimate?

Use whatever the department already tracks. Where no number exists, have the team estimate — and mark it as an estimate. Without a documented starting point, no pilot can demonstrate improvement.

4 REFERENCE ENTRY — MERIDIAN (ABRIDGED)

Example	Workflow: Quarterly grant reporting. Owner: Grants manager. Participants: Grants manager, two program directors, finance associate. Volume: 11 funder reports per quarter. Baseline: ~26 staff-days per quarter; 2 late submissions in the past 4 quarters; each report averages 4 revision cycles. Systems: Program database, spreadsheet exports, funder portals. Known problems: Manual data re-assembly, inconsistent narrative quality across authors, single point of failure in the grants manager.
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YOU SHOULD NOW HAVE ☐ Every candidate workflow documented ☐ Baseline or flagged estimate ☐ Owners named ☐ Systems and data mapped

Task Decomposition Worksheet

Break each prioritized workflow into tasks, decisions, handoffs, human interactions, and oversight responsibilities — with the workflow owner and one frontline participant in the room.



USE WHEN Decomposing the top two or three workflows from the inventory — time-box it: one workflow per 90-minute session.

OUTPUT A completed task decomposition worksheet per priority workflow, every item tagged by type.

A SESSION CONTEXT

Workflow	Owner	Session date	Time-box One workflow per 90-minute session.
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1 DECOMPOSE THE WORKFLOW

#	Task or item	Type	Owner	Frequency	Time	Judgment required	Error L·M·H	Pain points
E	Draft narrative sections from program data + prior reports.	T	3 authors (program directors)	Quarterly	8 days	High — which outcomes to feature per funder	M	Inconsistent quality across authors; most calendar delay
1								
2								
3								
4								
5								
6								
7								

Type: T = task · D = decision · H = handoff · HI = human interaction · O = oversight responsibility | Consequence of error: L = low · M = medium · H = high

2 WORKFLOW PROFILE

Purpose	Inputs & outputs	Systems & data	Variability & exceptions	Baseline performance From the inventory entry.
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YOU SHOULD NOW HAVE ☐ Every item tagged by type ☐ Time and frequency on each ☐ Error consequences rated ☐ Owner confirms it matches reality

4A Classification Worksheet



Classify every task into one of four dispositions. The verbs are deliberate: each names a decision the organization makes, not a property the task has — and the classification is a claim; the documentation is what makes it reviewable.

USE WHEN In a working session with the same people who did the decomposition — argue about the hard ones; the argument is the analysis.

AUTOMATE AI performs most or all of the task within established controls — review, exception handling, and escalation may remain.

AUGMENT AI assists a person; the person retains judgment, responsibility, and control. Most early use cases land here.

OUTPUT A task disposition map per priority workflow, with a written reason next to every disposition.

AVOID A deliberate decision not to use AI for a task — a design decision, not resistance to innovation.

ADD AI makes a valuable new task, service, control, or capability possible — including the new work of using AI responsibly.

A SESSION CONTEXT

Workflow	Classified by	Date
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1 TASK DISPOSITION MAP

#	Task	Disp.	Reason — required	Supporting evidence	Identified risks	Required human oversight
E	Draft narrative sections of the quarterly grant report.	Au	AI drafts from data + prior reports; program directors revise and own the result.	8 staff-days/quarter across three authors; inconsistent quality.	Funder-facing tone errors; family details in program examples.	Directors revise; grants manager reviews before anything reaches a funder.
1						
2						
3						
4						
5						
6						

Disposition: A = Automate · Au = Augment · Av = Avoid · Ad = Add | Note required oversight for every Automate and Augment.

2 PROVE THE MAP IS FINISHED

At least one Avoid you can defend to a skeptic An organization that cannot articulate what it will not use AI for has not finished thinking.	At least one Add — if there are none, look again AI transformation is not only subtraction.
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YOU SHOULD NOW HAVE

☐ Every task classified

☐ Written reason per task

☐ One defensible Avoid

☐ At least one Add

☐ Oversight noted

RESPECT Assessment



The cross-cutting decision lens: a task may be technically automatable and still fail as a human-centered design. Address all seven principles — no single vague score — and end with one of four words.

USE WHEN Running every proposed pilot through the RESPECT template with the council — before it reaches the portfolio.

OUTPUT A completed RESPECT assessment per use case, each with an explicit go / revise / pilot / reject decision.

A ASSESSMENT CONTEXT ●●●

Use case	Assessed by	Date
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1 SEVEN PRINCIPLES ●●●

Principle + organizational question	Supporting evidence	Concerns — "no concerns" requires a sentence why	Required controls	Owner
R — Reliability Does it perform consistently enough for this particular task, and how will errors be detected?				
E — Equitable access Can people across roles, locations, abilities, and levels of technical confidence benefit appropriately?				
S — Safety What foreseeable harm could result, and what controls or escalation paths are required?				
P — Privacy What data is collected, entered, retained, shared, or used for model training?				
E — Efficiency Does it meaningfully improve time, cost, quality, capacity, or service — after accounting for oversight?				
C — Choice & control Can people review, challenge, override, escalate, or opt out where appropriate?				
T — Transparency Do users and affected people understand when AI is involved, what it does, and what its limitations are?				

A workflow that saves an hour of drafting and adds ninety minutes of review has negative efficiency — count the oversight cost inside the efficiency judgment.

2 DECISION — ONE OF FOUR WORDS ●●●

DECISION ☐ GO ☐ REVISE ☐ PILOT ☐ REJECT

Rationale: the evidence behind this decision, and the controls it depends on.

YOU SHOULD NOW HAVE ☐ Seven principles with evidence ☐ Concern paired with control and owner ☐ Oversight cost counted ☐ One-word decision on record

Vendor & Tool Evaluation Rubric

Run every external AI vendor, implementation partner, and internal tool through the same ten criteria. The council decides; specialists assess — and every tool lands in one of three registry columns.



USE WHEN Evaluating any AI vendor, implementation partner, or internal tool — including every tool surfaced by the shadow-AI inventory — before it is approved or funded.

OUTPUT A working evaluation rubric and a registry placement: approved, experimental, or prohibited.

A EVALUATION CONTEXT

Vendor / tool	Evaluated by	Date	Workflow it serves A workflow the organization has actually prioritized.
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1 TEN EVALUATION CRITERIA

Criterion	Rating (1–5)	Evidence & notes	Follow-up needed
1 · Business & workflow fit Does it address a workflow the organization has actually prioritized?			
2 · Security & privacy Architecture, certifications, breach history, data handling.			
3 · Data retention & model-training terms Does the vendor retain inputs? Train on them? Can that be turned off contractually?			
4 · Identity, access & administration SSO, role-based access, admin visibility.			
5 · Integration requirements What it must connect to, and what that costs.			
6 · Accuracy & human-review requirements Error rates for this task, and the review burden they create.			
7 · Accessibility & employee usability Can people across roles and abilities actually use it?			
8 · Training & support What the vendor provides versus what the organization must build.			
9 · Total cost & expected value Licenses plus integration, training, oversight, and administration.			
10 · Vendor stability & exit options What happens to your data and workflows if the vendor folds or the contract ends?			

Add any criteria your regulatory context requires before adopting the rubric.

2 REGISTRY PLACEMENT

☐ Approved	☐ Experimental	☐ Prohibited	The council decides; specialists assess. Detailed technical, security, legal, and workflow evaluations are delegated — the placement decision stays with the council.
Delegated to: IT / security Systems, identity, data protection, technical evaluation.		Delegated to: legal / privacy / compliance Contracts, regulated data, risk classification.	Delegated to: workflow owner Useful, usable, and realistic for the actual work.

YOU SHOULD NOW HAVE ☐ Rubric adopted by council ☐ Registry published ☐ Intake form live ☐ Shadow-AI tools placed

Use-Case Prioritization Matrix

Prioritization turns the opportunity inventory into a portfolio. Score every RESPECT-cleared use case on ten criteria in a council session, rank, and select two or three pilots — no more, however tempting the list looks.



USE WHEN The inventory carries 4A dispositions and RESPECT evaluations, and the council must decide which use cases become pilots.

OUTPUT A ranked use-case portfolio with pilot selections and deferral reasons.

1 SCORE THE PORTFOLIO

Use case	Org value	Employee value	Feasibility	Data readiness	Integration	Adoption readiness	Risk	Cost	Measurability	Reusability	Total
Meridian: AI-assisted quarterly grant reporting (11 funders)	4	5	4	4	3	4	3	4	5	4	40

Score 1–5 per criterion, where 5 favors piloting (low risk and low cost score high). The first pilots should score well on employee value, feasibility, and measurability even if they are not the highest-value opportunities on paper — early wins that employees feel build the trust the harder projects will need.

2 PILOTS SELECTED (2–3, NO MORE)

Pilot 1 Strong on employee value, feasibility, measurability.	Pilot 2	Pilot 3 Optional — two is enough.
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3 DEFERRED CANDIDATES & WHY THEY WAIT

Deferred: [use case] — waits because [reason]; revisit when [condition]. Record the reason so the decision survives staff turnover — deferred candidates are documented, not discarded.

YOU SHOULD NOW HAVE ☐ Every cleared use case scored ☐ 2–3 pilots selected ☐ Early pilots employee-felt ☐ Deferrals documented

Pilot Charter

Every pilot gets a one-page charter before any work begins — no charter, no pilot. A pilot without stop conditions cannot fail, and a pilot that cannot fail cannot produce evidence.



USE WHEN A use case has been selected for pilot — drafted, then signed, before anyone touches a tool.

OUTPUT A signed pilot charter with baseline, stop conditions, and review date.

A PILOT & PEOPLE

Pilot name	Executive sponsor	Workflow owner	Participating users
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1 BASELINE, OUTCOME & TOOL

Baseline — documented before the pilot starts No charter, no pilot. Without a starting point, no pilot can demonstrate improvement. <i>Meridian: 26 staff-days/quarter; 4 revision cycles per report; 2 late submissions in 4 quarters.</i>	Intended outcome A named improvement against the baseline numbers.	Approved tool From the approved-tool registry.
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2 EVALUATION & OVERSIGHT

RESPECT evaluation summary	Decision	Human-review plan
Evidence, concerns, and required controls — each concern paired with a control and owner.	☐ Go ☐ Revise ☐ Pilot ☐ Reject	Who reviews what, before it reaches whom — and who certifies the final output.

3 MEASURES, STOP CONDITIONS & REVIEW

Success measures Each measured against the charter baseline.	STOP CONDITIONS Name numbers and events, not sentiments. Deciding in advance what result would end the pilot separates experimentation from commitment-by-drift.	Review date On the council calendar.
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Gate 3 — Portfolio.

The executive sponsor approves the pilot portfolio and budget. Each pilot charter is signed by its sponsor and workflow owner. Unsigned pilots do not launch.

4 SIGNATURES

Executive sponsor — signature	Date	Workflow owner — signature	Date
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YOU SHOULD NOW HAVE ☐ One-page charter per pilot ☐ Baseline captured pre-launch ☐ Stop conditions with numbers ☐ Review date on council calendar ☐ Sponsor & owner signatures

WORKPLACE AI ENABLEMENT PLAYBOOK — INSTITUTIONALIZE

Adoption & Outcome Dashboard

Training completion and license counts measure spending, not change. Track the full chain from access to outcome on one page, and pair every number with its baseline — the measurement question is always the same: compared to what?



USE WHEN Pilots are running — fed by the pilot measures and reviewed at every council meeting on a standing agenda.

OUTPUT A live adoption and outcome dashboard; a maintained risk and decision register.

A REPORTING CONTEXT

Reporting period	Prepared by	Council review date
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1 SIX MEASUREMENT LAYERS

Layer	Measure	Baseline	Current	Trend	Notes
Access Approved tools provisioned; employees with access.					
Usage Active use; repeat use; use embedded in named workflows.					
Performance Time and cycle-time changes against baseline; quality; error and rework rates.					
Experience Employee experience of the changed work; customer or constituent outcomes.					
Risk Risk events; near misses; human-review burden and whether it is sustainable.					
Capacity Internal ownership; reusable organizational knowledge; reduced dependence on outside help.					

Report against the baselines documented in the workflow inventory and pilot charters — every number paired with its baseline.

2 RISK & DECISION REGISTER

Date	Event or near miss	Control that caught it	Decision
Q2 pilot review	Draft briefly included an insufficiently de-identified example.	Caught in the grants manager's review — which is what the review was for.	Logged as near miss; de-identification step reinforced.

Log every risk event and near miss, including the ones the controls caught — those are evidence the system works, not embarrassments to bury.

YOU SHOULD NOW HAVE ☐ All six layers on one page ☐ Every number paired with its baseline ☐ Risk register in use ☐ Reviewed on a standing council agenda

WORKPLACE AI ENABLEMENT PLAYBOOK — INSTITUTIONALIZE

Capacity Maturity Assessment

The organization has capacity when it can do nine things repeatedly, without outside help. Score them honestly twice a year — a council that has stopped something and survived has demonstrated more institutional maturity than one that has only launched things.



USE WHEN Twice a year, and at each pilot review date when the council runs Gate 4.

OUTPUT Written scale / revise / stop decisions; a semi-annual capacity maturity assessment.

A ASSESSMENT CONTEXT

Assessment date	Assessed by	Reported to The sponsor and, where relevant, the board.
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1 NINE CAPABILITIES, REPEATEDLY, WITHOUT OUTSIDE HELP

Capability	Rating (1–5)	Evidence	Gap & next action
1 · Identify worthwhile opportunities			
2 · Evaluate tools and partners			
3 · Redesign workflows			
4 · Manage risk			
5 · Implement pilots			
6 · Support employees			
7 · Measure results			
8 · Scale what works			
9 · Stop what does not The one most organizations cannot do. Sunsetting feels like admitting error, so failed experiments linger, consuming licenses and attention.			

Gate 4 — Scale.
The council decides each pilot's fate in writing: scale, revise, or stop. No pilot continues by default.

2 GATE 4 DECISIONS, IN WRITING

Pilot	Decision	Reason	Date
	☐ Scale ☐ Revise ☐ Stop		
	☐ Scale ☐ Revise ☐ Stop		
	☐ Scale ☐ Revise ☐ Stop		

Run the assessment semi-annually and report the result to the sponsor and, where relevant, the board.

YOU SHOULD NOW HAVE ☐ Every pilot reviewed on its charter date ☐ One documented stop decision in year one ☐ Reusable playbooks from scaled pilots ☐ Capacity score trending toward durable