A Co-Designed Decision Checklist for Organizational AI Adoption

Abstract

Situation: Organizations adopting AI for occupational tasks requires actionable, pre-deployment decision instruments that go beyond abstract principles. *Complication*: A literature-derived framework may fail to reflect practitioner decision logic, and a single co-design round with a narrow participant pool may not surface all structural gaps or usability barriers. *Proposal*: We operationalized the four-theme framework from a prior scoping review [1] into two preliminary versions (V0.1 and V0.2) and then a 53-item checklist (V1). We subjected it to to three formal professional co-design rounds and one accessibility validation, producing four revised instruments (V2–V4). Across rounds the instrument was progressively simplified in language, reduced in length and—in V4—fundamentally restructured around an importance-weighted scoring system. The final 39-item V4 has 6 absolute blockers restricted to binary ratings. Applied to a simulated AI-assisted concept generation in packaging design, V4 yields a **Defer** verdict (57.5/125, 46%), with three active blockers: absent IP audit (T2.1), absent worker participation in tool selection (T3.3), and absent legal review (T4.1), identifying the specific conditions that must be resolved before adoption is advisable.

Keywords

AI adoption checklist, co-design, organizational readiness, packaging design, EU AI Act, iterative instrument design, importance-weighted scoring

1 Related Work

Checklist-based instruments have emerged as practical tools to implement AI ethics at the organizational level. Madaio et al.[2] developed a co-designed AI fairness checklist at Microsoft, demonstrating that practitioner involvement is necessary to surface organizational challenges invisible to purely literature-derived instruments. O'Brien et al. [3] further establish that decision instrument usability degrades when end-users are excluded from item formulation. Participatory design literature reinforces that worker involvement in AI deployment decisions is itself a risk-mitigation mechanism [4]. Among creative professionals specifically, Li et al. [9] document that GenAI adoption raises compounding concerns around skill degradation, copyright ownership, and agency — concerns that remain unaddressed when tools are selected without practitioner input. Nkanta [5] identifies transparent, two-way communication as the critical factor distinguishing adoption success from failure. These findings motivate treating co-design as a structural component of the instrument's content, not only its validation methodology.

2 Method

Our method follows a participatory co-design approach structured in successive phases: two in-class drafts (V0.1, V0.2) establishing the instrument's structural vocabulary and basic skeleton trough an initial formalization based on a 48-sources scoping reviews; a first, refined version (V1) through two in class co-design rounds with 8 students; three professional co-design rounds (V1→V2, V3→V4 and V4 validation) with a total of 16 professionals; one broad accessibility validation (V2.5→V3); one internal team revision (V2→V2.5). Figure 1 illustrates the full procedure. Furthermore, literature was In total, the process engaged 29 reviewers from diverse contexts (4 students for V0.1-V0.2, 4 students for V0.2-V1, 6 professionals for V1-V2, 5 mixed for V2.5-V3, 5 professionals for V3-V4, 5 mixed for finalizing V4). All the reference material, including all checklist versions and interview answers, is accessible through the link in Appendix G.

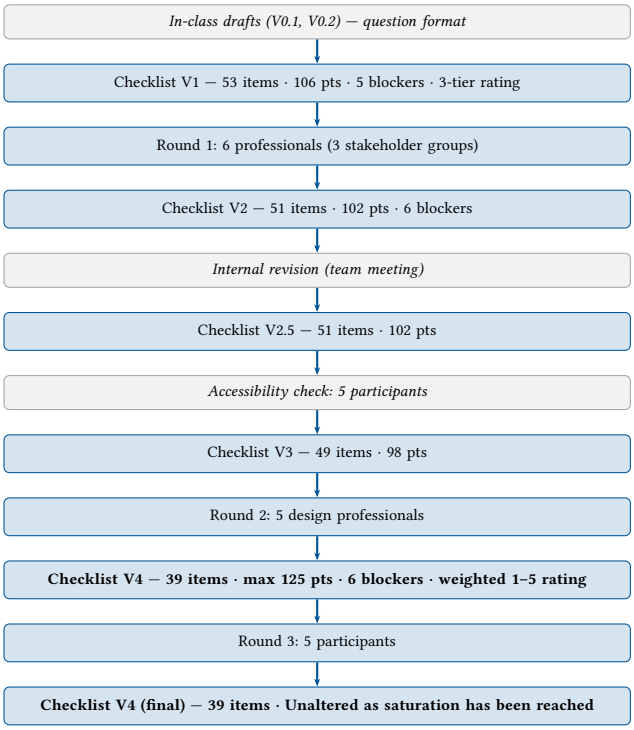

Figure 1: Full co-design procedure from in-class drafts to final instrument.

3 Data Collection

3.1 Checklist V1 Derivation

The first, main version of the checklist, V1, derives directly from the four-theme framework in [1] and the two class made checklists, versions V0.1 and V0.2. As opposed to V0.1 and V0.2, in V1 each of the 22 factors was operationalized as one to three verifiable, self-assessable affirmative items, yielding **53 items** across four sections (T1: 13; T2: 12; T3: 19; T4: 9), rated on a three-tier scale: Met (2 pts), Partially Met (1 pt), Not Met (0 pts), for a maximum of **106 points**. Five items were designated absolute.

3.2 Participants

Sixteen professionals participated across three formal co-design rounds (Table 1). Round 1 targeted V1 (May 16–18, 2026, n=6); Round 2 targeted V3 (May 22–25, 2026, n=5). Round 3 targeted V4 (May 26–30, 2026, n=5). An additional round where participants (Table 3) where asked to focus on accessibility validation (May 20–21, 2026) solicited feedback on V2.5 from five participants with diverse disciplinary backgrounds to test readability for non-specialist decision-makers.

Table 1: Professional Co-design Participants (formal rounds)

ID	Rnd	Group	Role	Context
E1	1	Tech. Eng.	MEP Engineer	BIM, 10+ yrs
D1	1	Design	Sr. Pkg. Designer	Cons. goods, 15+ yrs
D2	1	Design	Industrial Designer	Not disclosed
D3	1	Design	UX/UI Designer	Fintech, 5 yrs
D4	1	Design	Industrial Designer	Not disclosed
M1	1	Management	Sr. Art Director	Graphic, 30 yrs
A1	2	Design	Architect-Designer	Not disclosed
A2	2	Design	Architect-Designer	Freelance
G1	2	Design	Advertising-Designer	Signage industry
D5	2	Design	Design Intern	Studio context
D6	2	Design	UX/UI Designer	Digital, 4 yrs
N1	3	Undisclosed	Undisclosed	Undisclosed
HR1	3	Human resources	Undisclosed	Undisclosed
HR2	3	Human resources	Manager	Graphic design, 12 yrs
M2	3	Management	Manager	Design company
L1	3	Lawyer	Lawyer	Digital and IP, 10 yrs

3.3 Questionnaire Protocol

Each session lasted approximately 20–30 minutes. Participants received the current checklist version prior to their session. The questionnaire (Appendix A) covered four thematic blocks: (1) *coverage*; (2) *usability and scoring*; (3) *decision logic and blockers*; (4) *transferability*. Sessions were conducted both synchronously and asynchronously via in presence interview or structured questionnaire in Italian and English. Responses were independently coded by two team members; disagreements were resolved by consensus.

4 Data Analysis

4.1 Round 0: V0.1 → V0.2 → V1

The first two co-design iterations were conducted in-person during scheduled class activities. In each sub-round, four reviewers assessed the current checklist version and provided the foundational feedback that shaped subsequent development.

Round 0.1: V0.2 introduces three additional items in T1 and fully restructures T2 from a flat enumeration into six named risk categories, including a newly defined *Professional identity shifts* category. One item is added to T3 Factor 1, and the final two T4 items are rewritten from rhetorical or provocative phrasing into a direct, binary checklist format.

Round 0.2: V1 constitutes a complete structural redesign of V0.2. All items were converted from open interrogative to declarative rated statements, expanding the instrument from 34 questions to **53 rated items**. Two new sub-factors were introduced: T3-F7 (*Fail-safe & Fallback*) and T4-F2 (*Workforce AI Literacy*). An entirely new Decision Logic section was added, comprising a four-band scoring system, five Absolute Blockers, and a total score summary field.

4.2 Round 1: V1 → V2

Responses from Round 1 were coded along six revision dimensions. Table 2 summarizes the resulting changes.

Structural completeness. E1 and D1 independently identified the absence of domain-specific output validation. E1 noted that AI-generated MEP routing can violate binding engineering codes while appearing spatially correct; D1 identified an analogous gap for packaging manufacturing constraints. Convergent critique across two unrelated occupations [2] motivated the addition of a new item (T3.5 in V2).

Item redundancy. E1 and D3 flagged T3.7/T3.8 as duplicative (merged into one item). D2 flagged T1.11/T1.13 wellbeing items (merged).

Item clarity. T2.7 was flagged as the most ambiguous item by E1, D1, and D3, each for different professional reasons. Both T2.7 and T1.6 were rewritten.

Scoring. All six participants rejected a binary format. D1 and D3 independently proposed section-level minimum scores; E1's risk-weighted matrix was assessed as incompatible with usability goals. Section minima were adopted.

Blockers. Five original blockers confirmed. D3 argued for promoting T3.12 (worker involvement) to a blocker, consistent with Lee et al. [4]. Adopted; blocker count raised to six.

M1 additional feedback. The senior art director noted an absence of financial viability criteria, arguing that AI deployment costs and role displacement of external providers are practical prerequisites. Assessed as outside the pre-adoption decision instrument's scope; noted as a limitation.

Net V2: $53 - 3 + 1 =$ **51 items, 102 pts** (T1: 24; T2: 24; T3: 36; T4: 18).

Table 2: Change Log: V1 → V2

Item(s)	Change	Type	Source
T1.6	Preserves direct professional practice	Rewrite	D1, D3
T1.11+T1.13	Merged into single wellbeing item	Merge	E1, D2
T2.2	Adds loss of genuinely novel output	Rewrite	D1
T2.7	Concrete failure-mode criteria	Rewrite	E1, D1, D3
T2.11–12	Conceptual overlap eliminated	Rewrite	D3
T3.4	"IP audit" defined parenthetically	Clarif.	D2
T3.5 (new)	Domain-specific validation item	Addition	E1, D1
T3.6	Regulatory transparency clarified	Clarif.	D2
T3.7+8+9	3-into-1 merge; SLA defined	Merge	D1, D3
T3.12	Promoted to absolute blocker	Escalation	D3
Dec. logic	Section-level minima added	Addition	D1, D3
Dec. logic	6th absolute blocker added	Addition	D3

4.3 Internal Revision: V2 → V2.5

Following Round 1, an internal team session redistributed thematic content: wellbeing monitoring items were moved from T1 to T2,

sharpening T1 as a pure benefit-assessment section. Item count and total points were unchanged (**51 items, 102 pts**).

4.4 Accessibility Validation: V2.5 → V3

The accessibility round (n=5) was designed to test readability for non-specialist decision-makers. The key structural finding was a new cybersecurity (T2.15), flagged by participant AV1 (aerospace engineering): AI systems may be vulnerable to data poisoning, unauthorized access, and model manipulation. A new item was added to T2. Net V3: **49 items, 98 pts**.

Table 3: Accessibility Co-design Participants (accessibility round)

ID	Rnd	Group	Role	Context
AV1	A	Engineering Student	Aerospace Engineering Student	Student
AV2	A	Engineering Student	Aerospace Engineering Student	Student
P1	A	Not disclosed	Not disclosed	Non disclosed
P2	A	Not disclosed	Not disclosed	Non disclosed
F1	A	Philosophy Student	Philosophy	Student

4.5 Round 2: V3 → V4

Round 2 produced two categories of change. Table 4 documents structural revisions. Additionally, Round 2 produced the most significant methodological change across the entire iteration process: the adoption of an **importance-weighted scoring system**, replacing the three-tier rating (✓/△/×, 2/1/0 pts) used in all previous versions.

Scoring system change. Participants A2 and G1 independently raised the concern—consistent with what E1 had proposed in Round 1 with a risk-weighted matrix—that equal item weighting produced misleading totals: a gap in IP governance carries categorically different consequences from a gap in communication strategy. In V4, each item is rated on a 1–5 scale and classified by importance level: Critical (16 items, weight ×1), High (13 items, ×0.5), or Medium (10 items, ×0.25), yielding a maximum weighted score of **125 points**. Absolute blocker items are further restricted to binary ratings (1 = not met; 5 = fully met); any blocker rated 1 caps the adoption verdict at Defer regardless of total score. Note that this scoring approach is not a rescaling of previous versions and should not be directly compared numerically with V1–V3 scores.

Language and length. Participants from non-engineering professional backgrounds (A2, G1) noted that several V3 items were inaccessible to people who don't have a technical background. A systematic simplification pass was conducted across all four sections.

Item consolidation. T2 reduced from 15 to 10 items; T3 reduced from 16 to 11 items through merges documented in Table 4.

Net V4: **39 items; max 125 pts weighted** (Critical: 16, High: 13, Medium: 10). Full V4 instrument is in Appendix F.

Table 4: Change Log: V3 → V4 (key changes)

Item(s)	Change	Type	Source
All items	3-tier rating replaced by weighted 1–5 system	Sys. change	A2, G1
All items	Language simplified	Rewrite	A2, G1, D5
T2.2+T2.3	Deskilling assessment + protection merged	Merge	A2, G1
T2.6+7+13	Psychosocial, reporting, wellbeing merged	Merge	A2, G1
T2.8+T2.9	Worker understanding items merged	Merge	A2,G1
T3.1+T3.2	Reviewer designation + time merged	Merge	A2, G1
T3.8+T3.9	Reasoning + confidence flagging merged	Merge	A2, G1
T3.12+T3.14	Communication + reporting merged	Merge	A2, G1
T3.15+T3.16	Fallback + infrastructure merged	Merge	A2, G1

4.6 Round 3

Analysis of Round 3 responses confirmed the pattern already emerging from Round 2: the instrument has reached saturation relative to the group's time and resources. Saturation is considered here as the condition in which additional reviewer input yields either no proposed changes or changes of negligible structural impact. Accordingly, V4 and V5 are functionally equivalent, with no substantive item-level differences between versions. As such, the checklist name was kept as V4. Round 3 included five participants spanning distinct professional backgrounds: this cross-sector composition was intentional, aimed at testing the instrument's generality and language accessibility prior to finalization.

No respondent identified a missing factor, recommended removing any item, or proposed reordering the four sections. Where partial overlaps were noted — HR2 between T1.8 and T1.9, L1 between T1.1 and T1.2 — participants independently concluded that the distinctions were analytically meaningful and retained both items without proposing a merge. The four-section structure (Benefits, Risks, Mitigations, Readiness) was endorsed by all respondents; L1's observation that a legal practitioner might instinctively position Readiness before Mitigations was accompanied by an explicit acceptance of the current ordering as coherent. All respondents found the item language accessible; the sole ambiguity flagged — T2.8's operability in a legal context — was attributed to sector-specific evidence conventions rather than to a drafting deficiency, thus no rewrite was deemed necessary. The five-level weighted scoring system was preferred over a binary alternative by four out of five respondents, with the dissenting preference unaccompanied by any structural critique of the instrument.

As net outcome, no item was added, removed, merged, or reworded as a result of Round 3 review. The one concrete modification suggested — elevating T3.4 to blocker status — was not adopted, as the proposal lacked the corroborating evidence from multiple independent reviewers that drove all previous blocker decisions. The checklist is confirmed at V4. To support practical deployment, Checklist V4 is accompanied by a companion document, Checklist V4 Implementation Guidance, which provides operationalized examples of the evidence and actions required to fully meet each item. Where the checklist asks evaluators to make a judgment, the guidance document anchors that judgment to concrete organizational behaviors,

making the instrument actionable for practitioners without prior experience in AI governance assessment.

5 Worked Use Case: AI-Assisted Packaging Concept Generation

We apply V4 to the use case examined in [1]: a mid-size packaging agency deploying text-to-image generative tools (Adobe Firefly, Midjourney) and AI-assisted CAD for early-stage concept generation. Each item was rated on the V4 1–5 scale; Table 5 reports the aggregate weighted score.

Table 5: V4 Weighted Scoring: Packaging Design Agency

Importance	Items	Raw sum	Max	Wt.	Score
Critical	16	36	80	×1	36.0
High	13	30	65	×0.5	15.0
Medium	10	26	50	×0.25	6.5
Total	**39**	**92**	**195**	—	**57.5 / 125**

Active absolute blockers (rated 1): T2.1 (IP assessment), T3.3 (worker participation in tool selection), T4.1 (legal review). Any single blocker rated 1 caps the verdict at **Defer**; three are active.

T1 — Expected Benefits. Critical items T1.1–T1.3 score 3, 2, and 2 respectively: professional judgment is informally retained by senior designers (T1.1=3), but no formal supervision-to-risk calibration exists (T1.2=2) and AI-assisted decisions are not systematically traceable (T1.3=2). High and medium items average 3, reflecting that quality standards and strategic assessment are partially in place but undocumented.

T2 — Anticipated Risks. T2.1 is rated 1 (not met): no IP audit has been conducted for Firefly or Midjourney training data, creating immediate liability from day one [7, 8]. T2.2 (accountability assignment) scores 3 — informally held by the senior designer, but not documented. T2.3 (cybersecurity) and T2.4 (error protocols) both score 2, reflecting unassessed exposure. High items average 2.3: deskilling assessment is absent, and no formal plan exists to protect the tacit expertise bundle that defines senior packaging design [6, 10].

T3 — Mitigation Strategies. T3.3 is rated 1 (not met): tool selection is management-led without designer participation, causing adversarial adoption dynamics [4] to occur. T3.1 scores 3 (qualified senior reviewer exists but informally) and T3.2 scores 2 (no written manual fallback plan). T3.5 scores 2: informal prototyping exists but is not a systematic pre-delivery requirement, identified by D1 as a critical gap.

T4 — Organizational Readiness. T4.1 is rated 1 (not met): no legal review of EU AI Act obligations applicable to AI-generated commercial packaging content has been conducted, particularly relevant for food, pharmaceutical, and child-directed categories [1]. T4.3 (IT infrastructure) scores 4, the highest single rating — studio hardware is adequate. Governance, leadership communication, and HR adaptation all score 2.

Framework judgment. V4 yields a **Defer** verdict (57.5/125, 46%). Three absolute blockers must be resolved before any adoption proceeds: (1) an IP audit prior to first generative output used for client delivery; (2) a structured process for designer participation in tool selection; (3) a legal review of EU AI Act obligations. Beyond the blockers, reaching the Conditional band (≥75 pts) additionally requires formal traceability of AI-assisted decisions, a documented deskilling protection plan, and a written fallback procedure — all currently scoring 2 on the critical scale.

6 Discussion

The multi-round co-design process produced three categories of change. The first, corrections on internal clarity and redundancy, improved usability without changing scope. The second, structural additions (domain validation item; cybersecurity item), changed what the instrument measures. The third, the V4 weighted scoring system, changed how the instrument produces its verdict.

The most consequential finding from Round 1 remains the convergent critique from E1 and D1 on the absence of domain-specific output validation, illustrating the core value of multi-group co-design: structural gaps invisible within a single professional frame become visible when multiple frames are applied simultaneously [2]. The V4 Defer verdict on the packaging design use case is more conservative than what narrative analysis typically produces, because the blocker logic forces explicit resolution of IP, participation, and legal prerequisites that practitioners tend to defer rather than preempt.

Limitations. Design practitioners are overrepresented across the formal rounds (6 of 16 participants, Table 1). The accessibility validation round consisted primarily of students, limiting conclusions about non-specialist professional readability. The checklist has not been piloted in a live adoption decision but rather in a simulated one; its predictive validity remains untested. A structural limitation of V4 is its temporal boundedness: the instrument reflects the regulatory landscape, professional practices, and AI capabilities documented at the time of its development. As new achievements in the AI field are really rapid and revolutionize the knowledge about it, which is especially evident through figure 2 of Lamantea E. et al. (2026) [1], the checklist itself may become partially outdated. Users must ensure that the criteria against which adoption decisions are made remain valid over time.

7 Conclusion

This paper reports the multi-round co-design development of a 39-item organizational AI adoption decision checklist. Derived from a 48-source scoping review [1] and refined through three professional validation rounds and one accessibility check, the final checklist (V4) achieves shorter length, simpler language, and an importance-weighted scoring system that produces more operationally differentiated verdicts than equal-weight instruments. Applied to AI-assisted packaging concept generation, V4 produces a Defer verdict driven by three active absolute blockers, precisely identifying the organizational prerequisites for conditional adoption. The full V4 instrument is available in Appendix F.

Appendix

Research Team

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AI Use Disclosure

WHAT WAS USED: Claude (Anthropic); HOW IT WAS USED: It assisted with structuring the co-design analysis, drafting and editing prose, and generating LaTeX source; VERIFICATION: All content generated was reviewed by all team members. All analytical judgments were made by team members independently. All cited sources were located and read by team members.

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A Questionnaire Guide (All Rounds)

Duration: ~20–30 min **Format:** Asynchronous structured questionnaire (Italian/English) **Material shared:** Current checklist version

Introduction: "We are developing a general decision checklist to help organizations assess whether to adopt a specific AI use. We would like your practical perspective."

Block 1 — Introduction: (1) First of all, some introductions. Could you tell us a bit about yourself? What is your role in the company you work for, and what is your professional background? (2) And now, some context. What are the first things that come to mind when you think about the risks, benefits, readiness, and possible mitigations of applying artificial intelligence within a workplace environment?

Block 1 — Coverage: (1) Looking at the checklist as a whole, is there a missing factor that you expected to find? (2) Did you identify any redundant or unnecessary elements? (3) Does the division into four sections (benefits, risks, mitigations, readiness) seem logical to you, or would you change the order?

Block 2 — Usability: (1) Trying to read through some of the options, do you notice any ambiguous, unclear phrases, or ones that are difficult to answer using the system (objective: fully achieved / partially achieved / not achieved)? (2) For each theme (4 in total), can you point out one item that you particularly liked and/or that you think should be changed? (3) Do you think a binary system (objective: achieved / not achieved) would be more suitable for this purpose? (4) Do the four "absolute blockers" seem like the critical points of the discussion? Would you change, eliminate, or add any of them?

Block 3 — Transferability: (1) If you imagine using this checklist in a different sector from the one you work in (for example, in the medical, IT, or legal field), would the checklist still work? Would you change anything to make it more general? (2) If you could change only one thing about the checklist to make it more useful in a real decision-making process, what would you change?

Block 4 — Open feedback: (1) Thank you very much for your time. If you would like to leave any further comments, have any advice, or wish to add anything else, please write here:

B Checklist V1 — Complete Item List

Decision question: *Should this specific AI use be adopted, given the expected risks, benefits, mitigations, and organizational readiness?*
Rating: Met (2 pts) · Partially Met (1 pt) · Not Met (0 pts) · **Max: 106 pts**

Table 6: AI Adoption Assessment Checklist (Version 1)

Theme	Factor	Item	Rating
T1 — Expected Benefits	*F1 Operational Efficiency & Throughput*	**T1.1** Baseline measures for task time, workload, error rates, and output quality are documented prior to deployment, enabling pre/post comparison.	✓ △ ✗
		T1.2 Evidence from comparable AI deployments in similar occupational contexts demonstrates measurable productivity gains.	✓ △ ✗
		T1.3 Output review requirements are calibrated to the operational risk level of each AI-supported task.	✓ △ ✗
	F2 Skill Augmentation	**T1.4** AI-supported workflows explicitly define which tasks remain human-led, which are AI-assisted, and which are AI-automated.	✓ △ ✗
		T1.5 Employee baseline skills and AI literacy levels are assessed before deployment to determine augmentation potential and deskilling risk.	✓ △ ✗
		T1.6 The AI use augments worker judgment and capability rather than substituting independent professional decision-making on core tasks.	✓ △ ✗
	F3 Decision Consistency	**T1.7** Consistent decision criteria are documented and applied to AI-assisted outputs.	✓ △ ✗
		T1.8 AI-supported decisions can be traced, reviewed, and corrected at any point.	✓ △ ✗
	F4 Accelerated Innovation Cycles	**T1.9** The organization has assessed whether AI-driven acceleration of output cycles is strategically beneficial in its competitive context.	✓ △ ✗
	F5 Employee Wellbeing	**T1.10** The deployment is designed and communicated as augmentative rather than evaluative, with the explicit goal of reducing cognitive load.	✓ △ ✗
		T1.11 Workload, stress, and wellbeing indicators are monitored throughout deployment.	✓ △ ✗
		T1.12 AI implementation does not create performance expectations that systematically exceed human capacity.	✓ △ ✗
		T1.13 A support resource (e.g., counseling or occupational health channel) is available for workers experiencing AI-related psychological distress.	✓ △ ✗
			Section T1 score: ___ / 26 ✓
T2 — Anticipated Risks	*F1 Skill Erosion & Deskilling*	**T2.1** A documented strategy specifies how experienced workers will maintain independent professional judgment alongside AI use.	✓ △ ✗
		T2.2 Deskilling risk has been explicitly assessed for high-expertise roles most affected by the AI deployment.	✓ △ ✗
	F2 IP, Copyright & Authorship	**T2.3 [B]** The IP and copyright implications of AI-generated outputs have been assessed against applicable law prior to deployment.	✓ △ ✗
		T2.4 Authorship and ownership of AI-assisted outputs are clearly defined in internal policy and, where applicable, in client-facing contracts.	✓ △ ✗
	F3 Occupational Stress & Psychological Harm	**T2.5** Psychosocial risks (work intensification, surveillance anxiety, professional identity threat) have been assessed for all affected worker groups.	✓ △ ✗
		T2.6 A feedback mechanism exists for workers to report AI-induced stress, role ambiguity, or perceived loss of autonomy.	✓ △ ✗
	F4 Algorithmic Opacity	**T2.7** The AI system's decision logic is sufficiently transparent for workers to exercise meaningful oversight — not just nominal review — of its outputs.	✓ △ ✗
		T2.8 Workers can identify when and why an AI output should be questioned, corrected, or rejected.	✓ △ ✗

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Table 6 – *Continued from previous page*

Theme	Factor	Item	Rating
	F5 Accountability Diffusion	**T2.9 [B]** Accountability for AI-assisted decisions is clearly assigned to a named human role, not distributed across worker, manager, and vendor without resolution.	✓ △ ✗
		T2.10 Protocols exist for recognizing and handling AI errors, hallucinations, or malfunctions, including corrective actions and escalation paths.	✓ △ ✗
	F6 Professional Identity Shifts & Power Dynamics	**T2.11** Power dynamic shifts between junior and senior workers resulting from AI adoption have been identified and addressed in change-management planning.	✓ △ ✗
		T2.12 A change-management plan explicitly protects the organizational status of domain expertise and professional seniority.	✓ △ ✗
			Section T2 score: ___ / 24 ✓
T3 — Mitigation Strategies	*F1 Meaningful Human Oversight*	**T3.1 [B]** A qualified person is formally designated to review, interrogate, and override AI outputs before any consequential use.	✓ △ ✗
		T3.2 Designated reviewers are allocated sufficient time to conduct critical — not superficial — evaluation of AI outputs.	✓ △ ✗
		T3.3 A rotation or cross-audit procedure is in place to prevent reviewers from developing passive acceptance of systematic AI errors.	✓ △ ✗
	F2 IP & Ethics Governance	**T3.4** A pre-deployment IP audit has been conducted covering training-data origin, licensing arrangements, and output ownership.	✓ △ ✗
		T3.5 A filtering or access-control mechanism prevents sensitive organizational data from being included in AI prompts or used for vendor model training.	✓ △ ✗
		T3.6 The AI system meets applicable labelling and transparency requirements under relevant AI regulations.	✓ △ ✗
	F3 Accountability & Vendor Governance	**T3.7** Responsibility for AI errors is clearly apportioned between the AI vendor, the deploying organization, and individual workers in documented agreements.	✓ △ ✗
		T3.8 The vendor agreement (SLA) includes legal guarantees regarding system accuracy, reliability, and liability allocation.	✓ △ ✗
		T3.9 The vendor provides access to system logs in the event of a legal investigation or audit.	✓ △ ✗
	F4 Transparency & Explainability	**T3.10** The AI system communicates its decision rationale to workers in terms they can act on.	✓ △ ✗
		T3.11 The system surfaces its confidence level or flags low-reliability outputs, rather than presenting all outputs with equal authority.	✓ △ ✗
	F5 Participatory Design & Communication	**T3.12** Affected workers are involved in tool selection, task-delegation boundaries, and deployment protocol design.	✓ △ ✗
		T3.13 A formal procedure allows workers to raise concerns about safety, stress, or loss of autonomy without retaliation risk.	✓ △ ✗
		T3.14 An internal communication strategy is prepared to explain AI adoption rationale, clarify role boundaries, and address worker anxiety.	✓ △ ✗
	F6 Co-skilling & AI-Expertise Integration	**T3.15** A reskilling program couples deepened domain expertise with algorithmic literacy, rather than training prompt-engineering skills in isolation.	✓ △ ✗
		T3.16 Training explicitly teaches workers to recognize AI limitations, biases, and failure modes — not only correct operation.	✓ △ ✗
		T3.17 A post-deployment monitoring plan is in place to detect early signals of skill degradation, output quality decline, and wellbeing deterioration.	✓ △ ✗
	F7 Fail-safe & Fallback	**T3.18 [B]** If the AI system fails or becomes unavailable, a documented manual process exists and workers are capable of executing it.	✓ △ ✗
		T3.19 The organization retains the physical infrastructure and staffing to fully support non-AI workflows when needed.	✓ △ ✗
			Section T3 score: ___ / 38 ✓
T4 — Organizational Readiness	*F1 Technical Infrastructure & Data Quality*	**T4.1** Compatible IT infrastructure (servers, compute, integration) is in place and ready for AI deployment without creating privacy or security vulnerabilities.	✓ △ ✗
		T4.2 A formal data readiness assessment has confirmed that training and operational data meets quality, completeness, and consistency requirements.	✓ △ ✗
	F2 Workforce AI Literacy	**T4.3** Workforce AI literacy is sufficient for workers to critically evaluate AI outputs, recognize system limitations, and maintain independent judgment.	✓ △ ✗
		T4.4 Clear roles are assigned to monitor AI outputs, with defined authority to flag, escalate, or reject them.	✓ △ ✗
	F3 Leadership & Strategic Alignment	**T4.5** Leadership has established a documented governance position on AI use, with measurable objectives and an explicit accountability model.	✓ △ ✗
		T4.6 Leadership's stance on human oversight is clearly communicated and shapes organizational norms around AI integration.	✓ △ ✗
	F4 Reskilling Strategy & HRD Alignment	**T4.7** A pre-adoption skill-gap analysis has been conducted to identify competency shortfalls before tool procurement, not after.	✓ △ ✗
		T4.8 The HR function has adapted its processes (hiring profiles, performance criteria, career paths) to reflect AI-integrated work.	✓ △ ✗
	F5 Regulatory & Legal Readiness	**T4.9 [B]** Legal counsel has reviewed applicable regulatory obligations (e.g., EU AI Act, sector-specific rules) and confirmed compliance pathways prior to deployment.	✓ △ ✗

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Table 6 – *Continued from previous page*

Theme	Factor	Item	Rating
			Section T4 score: ___ / 18 ✓

V1 Decision Logic: Scoring: Met=2, Partial=1, Not Met=0. Max: 106 pts. Blockers (any Not Met caps verdict at Defer): T2.3, T2.9, T3.1, T3.18, T4.9.

Score	Verdict	Implication
85–106 (≥80%)	Adopt	Proceed with governance
64–84 (60–79%)	Conditional	Resolve gaps during adoption
32–63 (30–59%)	Defer	Close significant gaps first
0–31 (<30%)	Do not adopt	Conditions unmet

T1 ___/26 T2 ___/24 T3 ___/38 T4 ___/18 **TOTAL ___/106**

C Checklist V2

Decision question: *Should this specific AI use be adopted, given the expected risks, benefits, mitigations, and organizational readiness?*
Rating: Met (2 pts) · Partially Met (1 pt) · Not Met (0 pts) · **Max: 102 pts**

Table 7: AI Adoption Assessment Checklist (Version 2)

Theme	Factor	Item	Rating
T1 — Expected Benefits	*F1 Operational Efficiency & Throughput*	**T1.1** Baseline measures for task time, workload, error rates, and output quality are documented prior to deployment, enabling pre/post comparison.	✓ △ ✗
		T1.2 Evidence from comparable AI deployments in similar occupational contexts demonstrates measurable productivity gains.	✓ △ ✗
		T1.3 Output review requirements are calibrated to the operational risk level of each AI-supported task.	✓ △ ✗
	F2 Skill Augmentation	**T1.4** AI-supported workflows explicitly define which tasks remain human-led, which are AI-assisted, and which are AI-automated.	✓ △ ✗
		T1.5 Employee baseline skills and AI literacy levels are assessed before deployment to determine augmentation potential and deskilling risk.	✓ △ ✗
		T1.6 *[rewritten v2]* The AI deployment preserves workers' direct practice of core professional judgment: tasks that define the occupation's expertise are not fully delegated to AI outputs without substantive human evaluation and transformation.	✓ △ ✗
	F3 Decision Consistency	**T1.7** Consistent decision criteria are documented and applied to AI-assisted outputs.	✓ △ ✗
		T1.8 AI-supported decisions can be traced, reviewed, and corrected at any point.	✓ △ ✗
	F4 Accelerated Innovation Cycles	**T1.9** The organization has assessed whether AI-driven acceleration of output cycles is strategically beneficial in its competitive context.	✓ △ ✗
	F5 Employee Wellbeing	**T1.10** The deployment is designed and communicated as augmentative rather than evaluative, with the explicit goal of reducing cognitive load.	✓ △ ✗
		T1.11 *[merged T1.11+T1.13 v2]* Workload, stress, and wellbeing indicators are monitored throughout deployment, and a support resource (e.g., occupational health channel or counseling) is accessible to workers experiencing AI-related psychological distress.	✓ △ ✗
		T1.12 AI implementation does not create performance expectations that systematically exceed human capacity.	✓ △ ✗
			Section T1 score: ___ / 24 ✓
T2 — Anticipated Risks	*F1 Skill Erosion & Deskilling*	**T2.1** A documented strategy specifies how experienced workers will maintain independent professional judgment alongside AI use.	✓ △ ✗
		T2.2 *[strengthened v2]* Deskilling risk has been explicitly assessed for high-expertise roles most affected by the deployment, including the risk of losing the capacity to produce genuinely novel outputs that AI, trained on existing work, cannot generate.	✓ △ ✗
	F2 IP, Copyright & Authorship	**T2.3 [B]** The IP and copyright implications of AI-generated outputs have been assessed against applicable law prior to deployment.	✓ △ ✗
		T2.4 Authorship and ownership of AI-assisted outputs are clearly defined in internal policy and, where applicable, in client-facing contracts.	✓ △ ✗
	F3 Occupational Stress & Psychological Harm	**T2.5** Psychosocial risks (work intensification, surveillance anxiety, professional identity threat) have been assessed for all affected worker groups.	✓ △ ✗
		T2.6 A feedback mechanism exists for workers to report AI-induced stress, role ambiguity, or perceived loss of autonomy.	✓ △ ✗

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Table 7 – *Continued from previous page*

Theme	Factor	Item	Rating
	F4 Algorithmic Opacity	**T2.7** *[rewritten v2]* Workers can articulate the criteria the AI applied to produce a specific output, identify known failure modes (e.g., hallucinations, systematic biases, constraint violations), and document their rationale for accepting or overriding any given output.	✓ △ ✗
		T2.8 Workers have sufficient understanding of the AI system to determine when its outputs should be questioned, corrected, or rejected, independent of the system's own confidence signals.	✓ △ ✗
	F5 Accountability Diffusion	**T2.9 [B]** Accountability for AI-assisted decisions is clearly assigned to a named human role, not distributed across worker, manager, and vendor without resolution.	✓ △ ✗
		T2.10 Protocols exist for recognizing and handling AI errors, hallucinations, or malfunctions, including corrective actions and escalation paths.	✓ △ ✗
	F6 Professional Identity Shifts & Power Dynamics	**T2.11** *[rewritten v2]* The impact of AI adoption on the relative standing and influence of junior versus senior workers has been explicitly assessed and addressed in planning.	✓ △ ✗
		T2.12 *[rewritten v2]* A change-management plan protects domain expertise as an organizational asset and provides specific support for experienced workers facing professional identity disruption.	✓ △ ✗
			Section T2 score: ___ / 24 ✓
T3 — Mitigation Strategies	*F1 Meaningful Human Oversight*	**T3.1 [B]** A qualified person is formally designated to review, interrogate, and override AI outputs before any consequential use.	✓ △ ✗
		T3.2 Designated reviewers are allocated sufficient time to conduct critical — not superficial — evaluation of AI outputs.	✓ △ ✗
		T3.3 A rotation or cross-audit procedure is in place to prevent reviewers from developing passive acceptance of systematic AI errors.	✓ △ ✗
	F2 IP & Ethics Governance	**T3.4** A pre-deployment IP audit (i.e., a formal review of the AI tool's training-data origin, licensing terms, and output ownership) has been conducted.	✓ △ ✗
		T3.5 *[new v2]* A process exists to validate AI outputs against domain-specific professional standards, physical or manufacturing constraints, or regulatory codes applicable to the task, before outputs are used consequentially.	✓ △ ✗
		T3.6 A filtering or access-control mechanism prevents sensitive organizational data from being included in AI prompts or used for vendor model training.	✓ △ ✗
		T3.7 The AI system meets applicable labelling and transparency requirements under relevant AI regulations (e.g., EU AI Act Articles 13 and 50 on transparency obligations for high-risk and general-purpose AI systems).	✓ △ ✗
	F3 Accountability & Vendor Governance	**T3.8** *[merged T3.7+T3.8 v2]* Responsibility for AI errors is clearly apportioned between vendor, organization, and individual workers in a documented vendor agreement (SLA: Service Level Agreement) that includes legal guarantees on system accuracy, reliability, liability allocation, and audit log access in the event of legal investigation.	✓ △ ✗
	F4 Transparency & Explainability	**T3.9** The AI system communicates its decision rationale to workers in terms they can act on.	✓ △ ✗
		T3.10 The system surfaces its confidence level or flags low-reliability outputs, rather than presenting all outputs with equal authority.	✓ △ ✗
	F5 Participatory Design & Communication	**T3.11 [B]** Affected workers are involved in tool selection, task-delegation boundaries, and deployment protocol design.	✓ △ ✗
		T3.12 A formal procedure allows workers to raise concerns about safety, stress, or loss of autonomy without retaliation risk.	✓ △ ✗
		T3.13 An internal communication strategy is prepared to explain AI adoption rationale, clarify role boundaries, and address worker anxiety.	✓ △ ✗
	F6 Co-skilling & AI-Expertise Integration	**T3.14** A reskilling program couples deepened domain expertise with algorithmic literacy, rather than training prompt-engineering skills in isolation.	✓ △ ✗
		T3.15 Training explicitly teaches workers to recognize AI limitations, biases, and failure modes — not only correct operation.	✓ △ ✗
		T3.16 A post-deployment monitoring plan is in place to detect early signals of skill degradation, output quality decline, and wellbeing deterioration.	✓ △ ✗
	F7 Fail-safe & Fallback	**T3.17 [B]** If the AI system fails or becomes unavailable, a documented manual process exists and workers are capable of executing it.	✓ △ ✗
		T3.18 The organization retains the physical infrastructure and staffing to fully support non-AI workflows when needed.	✓ △ ✗
			Section T3 score: ___ / 36 ✓
T4 — Organizational Readiness	*F1 Technical Infrastructure & Data Quality*	**T4.1** Compatible IT infrastructure (servers, compute, integration) is in place and ready for AI deployment without creating privacy or security vulnerabilities.	✓ △ ✗
		T4.2 A formal data readiness assessment has confirmed that training and operational data meets quality, completeness, and consistency requirements.	✓ △ ✗
	F2 Workforce AI Literacy	**T4.3** Workforce AI literacy is sufficient for workers to critically evaluate AI outputs, recognize system limitations, and maintain independent judgment.	✓ △ ✗
		T4.4 Clear roles are assigned to monitor AI outputs, with defined authority to flag, escalate, or reject them.	✓ △ ✗
	F3 Leadership & Strategic Alignment	**T4.5** Leadership has established a documented governance position on AI use, with measurable objectives and an explicit accountability model.	✓ △ ✗

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Table 7 – *Continued from previous page*

Theme	Factor	Item	Rating
		T4.6 Leadership's stance on human oversight is clearly communicated and shapes organizational norms around AI integration.	✓ △ ✗
	F4 Reskilling Strategy & HRD Alignment	**T4.7** A pre-adoption skill-gap analysis has been conducted to identify competency shortfalls before tool procurement, not after.	✓ △ ✗
		T4.8 The HR function has adapted its processes (hiring profiles, performance criteria, career paths) to reflect AI-integrated work.	✓ △ ✗
	F5 Regulatory & Legal Readiness	**T4.9 [B]** Legal counsel has reviewed applicable regulatory obligations (e.g., EU AI Act, sector-specific rules) and confirmed compliance pathways prior to deployment.	✓ △ ✗
			Section T4 score: ___ / 18 ✓

V2 Decision Logic: Scoring: Met=2, Partial=1, Not Met=0. Maximum: 104 points (52 items × 2) – *note: actual item count is 51, max 102 pts.* Section minima (must be met to avoid score masking): T1 14, T2 14, T3 22, T4 10. Absolute blockers (any ✗ caps verdict at Defer): T2.3, T2.9, T3.1, T3.11, T3.17, T4.9.

Score	Verdict	Implication
82–102 (≥80%)	Adopt	Proceed with governance and monitoring.
61–81 (60–79%)	Conditional	Resolve △/✗ items before or during deployment.
31–60 (30–59%)	Defer	Close significant gaps first.
0–30 (<30%)	Do not adopt	Adoption is not advisable under current conditions.

T1 ___/24 T2 ___/24 T3 ___/36 T4 ___/18 **TOTAL ___/102**

D Checklist V2.5

Decision question: *Should this specific AI use be adopted, given the expected risks, benefits, mitigations, and organizational readiness?*
Rating: Met (2 pts) · Partially Met (1 pt) · Not Met (0 pts) · **Max: 102 pts**

Table 8: AI Adoption Assessment Checklist (Version 2.5)

#	Item	Rating
	T1 — Expected Benefits	
T1.1	A clear pre-AI benchmark exists for task time, workload, error frequency, and output quality.	✓ △ ✗
T1.2	Similar AI deployments have demonstrated measurable productivity gains.	✓ △ ✗
T1.3	The level of human review matches the risk associated with the AI-supported task.	✓ △ ✗
T1.4	Human-led, AI-assisted, and AI-automated tasks are explicitly distinguished.	✓ △ ✗
T1.5	Before introducing AI, the organization assesses whether workers have the skills needed to use and critically evaluate the system.	✓ △ ✗
T1.6	Core professional judgment is preserved and not fully delegated to AI.	✓ △ ✗
T1.7	The organization uses consistent standards to evaluate whether AI-assisted outputs meet expected quality requirements.	✓ △ ✗
T1.8	AI-supported decisions can be traced, reviewed, and corrected.	✓ △ ✗
T1.9	The organization has assessed whether AI acceleration is strategically beneficial.	✓ △ ✗
T1.10	The AI system is introduced as a tool to support workers and reduce cognitive load, rather than as a system for performance evaluation.	✓ △ ✗
		Section T1 score: ___ / 20 ✓
	T2 — Anticipated Risks	
T2.1	A strategy exists to preserve independent expert judgment alongside AI use.	✓ △ ✗
T2.2	Deskilling risk has been explicitly assessed.	✓ △ ✗
T2.3	The IP (intellectual property) and copyright implications of AI-generated outputs are assessed against applicable laws before deployment.	✓ △ ✗
T2.4	Authorship and ownership of AI-assisted outputs are clearly defined.	✓ △ ✗
T2.5	Psychosocial risks have been assessed.	✓ △ ✗
T2.6	Workers can report AI-induced stress or loss of autonomy.	✓ △ ✗
T2.7	Workers can critically explain their decisions regarding AI outputs and identify known failure modes.	✓ △ ✗
T2.8	Workers understand when outputs should be questioned or rejected.	✓ △ ✗
T2.9	Responsibility for AI-supported decisions is clearly assigned to a specific human role and is not left undefined.	✓ △ ✗
T2.10	Protocols exist for handling AI errors and malfunctions.	✓ △ ✗
T2.11	The impact on junior and senior workers has been assessed.	✓ △ ✗
T2.12	A change-management plan protects domain expertise.	✓ △ ✗
T2.13	Workload, stress, and wellbeing indicators are monitored.	✓ △ ✗
T2.14	AI implementation does not create unrealistic performance expectations.	✓ △ ✗
		Section T2 score: ___ / 28 ✓
	T3 — Mitigation Strategies	

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Table 8 – *Continued from previous page*

#	Item	Rating
T3.1	A qualified person is designated to review and override AI outputs.	✓ △ ✗
T3.2	Reviewers are allocated sufficient evaluation time.	✓ △ ✗
T3.3	A rotation or cross-audit procedure is used to prevent reviewers from becoming overly dependent on AI outputs or repeatedly overlooking systematic errors.	✓ △ ✗
T3.4	A pre-deployment IP (intellectual property) audit has been completed, including a review of the AI tool's training-data sources, licensing terms, and output ownership conditions.	✓ △ ✗
T3.5	AI outputs are validated against domain-specific standards.	✓ △ ✗
T3.6	Sensitive organizational data is protected from AI systems.	✓ △ ✗
T3.7	AI systems meet applicable transparency regulations.	✓ △ ✗
T3.8	Vendor agreements define responsibility for AI errors.	✓ △ ✗
T3.9	The AI system communicates its reasoning in terms that workers can understand and use during output evaluation.	✓ △ ✗
T3.10	The AI tool flags outputs that require caution, additional review, or lower confidence.	✓ △ ✗
T3.11	Affected workers participate in choosing the AI tool, defining task boundaries, and designing deployment protocols.	✓ △ ✗
T3.12	A protected reporting process is available for workers to raise concerns about AI use.	✓ △ ✗
T3.13	The organization clearly communicates why AI is being adopted, how roles may change, and how worker concerns will be handled.	✓ △ ✗
T3.14	Reskilling combines domain expertise with AI literacy.	✓ △ ✗
T3.15	Training teaches AI limitations and biases.	✓ △ ✗
T3.16	The organization has a post-deployment monitoring plan to detect early signs of skill degradation, output quality decline, and wellbeing deterioration.	✓ △ ✗
T3.17	A documented manual process exists for cases where the AI system fails or becomes unavailable, and workers are capable of executing it.	✓ △ ✗
T3.18	Infrastructure remains available for non-AI workflows.	✓ △ ✗
	Section T3 score: ___ / 36 ✓	
	T4 — Organizational Readiness	
T4.1	Compatible IT infrastructure is ready for deployment.	✓ △ ✗
T4.2	The organization verifies that the data used by the AI system meets quality, completeness, and consistency requirements.	✓ △ ✗
T4.3	Workers have the AI literacy needed to critically evaluate outputs, identify system limitations, and preserve independent professional judgment.	✓ △ ✗
T4.4	Specific roles are responsible for monitoring AI outputs and have clear authority to flag, escalate, or reject problematic results.	✓ △ ✗
T4.5	Leadership has established documented objectives and accountability structures for AI use.	✓ △ ✗
T4.6	Leadership clearly communicates expectations for human oversight.	✓ △ ✗
T4.7	A pre-adoption skill-gap analysis has been conducted.	✓ △ ✗
T4.8	HR processes have been adapted for AI-integrated work.	✓ △ ✗
T4.9	Legal counsel has reviewed applicable regulations.	✓ △ ✗
	Section T4 score: ___ / 18 ✓	

V2.5 Decision Logic: Scoring: ✓=2, △=1, ✗=0. Maximum: 102 points (51 items × 2). Absolute blockers (any ✗ caps verdict at Defer): T2.3, T2.9, T3.1, T3.11, T3.17, T4.9.

Score	Verdict	Implication
78–98 (≥80%)	Adopt	Proceed with standard governance and ongoing monitoring.
59–77 (60–79%)	Conditional	Resolve △ and ✗ items before or concurrently with adoption.
29–58 (30–59%)	Defer	Significant gaps in readiness or risk management must be closed first.
0–28 (<30%)	Do not adopt	Adoption is not advisable under current conditions.

T1 ___/20 T2 ___/28 T3 ___/36 T4 ___/18 **TOTAL ___/102**

E Checklist V3

Decision question: *Should this specific AI use be adopted, given the expected risks, benefits, mitigations, and organizational readiness?*
Rating: Met (2 pts) · Partially Met (1 pt) · Not Met (0 pts) · **Max: 98 pts**

Table 9: AI Adoption Assessment Checklist (Version 3)

#	Item	Rating
	T1 — Expected Benefits	
T1.1	A clear pre-AI benchmark exists for task time, workload, error frequency, and output quality to allow critical evaluation of AI adoption necessity.	✓ △ ✗
T1.2	Similar AI deployments have demonstrated measurable productivity gains.	✓ △ ✗
T1.3	The level of human review matches the risk associated with the AI-supported task.	✓ △ ✗
T1.4	Human-led, AI-assisted, and AI-automated tasks are explicitly distinguished.	✓ △ ✗
T1.5	Core professional judgment is preserved and not fully delegated to AI.	✓ △ ✗
T1.6	The organization uses consistent standards to evaluate whether AI-assisted outputs meet expected quality requirements.	✓ △ ✗
T1.7	AI-supported decisions can be traced, reviewed, and corrected.	✓ △ ✗
T1.8	The organization has assessed whether AI acceleration is strategically beneficial.	✓ △ ✗

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Table 9 – *Continued from previous page*

#	Item	Rating
T1.9	The AI system is introduced as a tool to support workers and reduce cognitive load, rather than as a system for performance evaluation.	✓ △ ✗
		Section T1 score: ___ / 18 ✓
	T2 — Anticipated Risks	
T2.1	A strategy exists to preserve independent expert judgment alongside AI use.	✓ △ ✗
T2.2	Deskilling risk has been explicitly assessed.	✓ △ ✗
T2.3	A plan protects workers from deskilling.	✓ △ ✗
T2.4	The IP (intellectual property) and copyright implications of AI-generated outputs are assessed against applicable laws before deployment.	✓ △ ✗
T2.5	Authorship and ownership of AI-assisted outputs are clearly defined.	✓ △ ✗
T2.6	Psychosocial risks have been assessed.	✓ △ ✗
T2.7	Workers can report AI-induced stress or loss of autonomy.	✓ △ ✗
T2.8	Workers can critically explain their decisions regarding AI outputs and identify known failure modes.	✓ △ ✗
T2.9	Workers understand when outputs should be questioned or rejected.	✓ △ ✗
T2.10	Responsibility for AI-supported decisions is clearly assigned to a specific human role and is not left undefined.	✓ △ ✗
T2.11	Protocols exist for handling AI errors and malfunctions.	✓ △ ✗
T2.12	The impact on workers with different experience levels has been assessed.	✓ △ ✗
T2.13	Workload, stress, and wellbeing indicators are monitored.	✓ △ ✗
T2.14	AI implementation does not create unrealistic performance expectations.	✓ △ ✗
T2.15	The organization has assessed cybersecurity risks associated with the AI system, including data poisoning, unauthorized access, and model manipulation.	✓ △ ✗
		Section T2 score: ___ / 30 ✓
	T3 — Mitigation Strategies	
T3.1	A qualified person is designated to review and override AI outputs.	✓ △ ✗
T3.2	Reviewers are allocated sufficient evaluation time.	✓ △ ✗
T3.3	A rotation or cross-audit procedure is used to prevent reviewers from becoming overly dependent on AI outputs or repeatedly overlooking systematic errors.	✓ △ ✗
T3.4	A pre-deployment IP (intellectual property) audit has been completed, including a review of the AI tool's training-data sources, licensing terms, and output ownership conditions.	✓ △ ✗
T3.5	AI outputs are validated against domain-specific standards.	✓ △ ✗
T3.6	Sensitive organizational data is protected from AI systems.	✓ △ ✗
T3.7	Vendor agreements define responsibility for AI errors.	✓ △ ✗
T3.8	The AI system communicates its reasoning in terms that workers can understand and use during output evaluation.	✓ △ ✗
T3.9	The AI tool flags outputs that require caution, additional review, or lower confidence.	✓ △ ✗
T3.10	Affected workers participate in choosing the AI tool, defining task boundaries, and designing deployment protocols.	✓ △ ✗
T3.11	A protected reporting process is available for workers to raise concerns about AI use.	✓ △ ✗
T3.12	The organization clearly communicates why AI is being adopted, how roles may change, and how worker concerns will be handled.	✓ △ ✗
T3.13	Reskilling combines domain expertise with AI literacy, including AI limitations and biases.	✓ △ ✗
T3.14	The organization has a post-deployment monitoring plan to detect early signs of skill degradation, output quality decline, and wellbeing deterioration.	✓ △ ✗
T3.15	A documented manual process exists for cases where the AI system fails or becomes unavailable, and workers are capable of executing it.	✓ △ ✗
T3.16	Infrastructure remains available for non-AI workflows.	✓ △ ✗
		Section T3 score: ___ / 32 ✓
	T4 — Organizational Readiness	
T4.1	Compatible IT infrastructure is ready for deployment.	✓ △ ✗
T4.2	The organization verifies that the data used by the AI system meets quality, completeness, and consistency requirements.	✓ △ ✗
T4.3	Workers have the AI literacy needed to critically evaluate outputs, identify system limitations, and preserve independent professional judgment.	✓ △ ✗
T4.4	Specific roles are responsible for monitoring AI outputs and have clear authority to flag, escalate, or reject problematic results.	✓ △ ✗
T4.5	Leadership has established documented objectives and accountability structures for AI use.	✓ △ ✗
T4.6	Leadership clearly communicates expectations for human oversight.	✓ △ ✗
T4.7	A pre-adoption skill-gap analysis has been conducted.	✓ △ ✗
T4.8	HR processes have been adapted for AI-integrated work.	✓ △ ✗
T4.9	Legal counsel has reviewed applicable regulations.	✓ △ ✗
		Section T4 score: ___ / 18 ✓

V3 Decision Logic: Scoring: ✓=2, △=1, ✗=0. Maximum: 98 points (49 items × 2). Absolute blockers (any ✗ caps verdict at Defer): T2.3, T2.9, T3.1, T3.11, T3.17, T4.9.

Score	Verdict	Implication
78–98 (≥80%)	Adopt	Proceed with standard governance and ongoing monitoring.
59–77 (60–79%)	Conditional	Resolve △ and ✗ items before or concurrently with adoption.
29–58 (30–59%)	Defer	Significant gaps in readiness or risk management must be closed first.
0–28 (<30%)	Do not adopt	Adoption is not advisable under current conditions.

T1 ___/18 T2 ___/30 T3 ___/32 T4 ___/18 **TOTAL ___/98**

F Checklist V4 — Final Instrument

Decision question: *Should this specific AI use be adopted, given the expected risks, benefits, mitigations, and organizational readiness?*

This checklist is used to assess whether an organization is ready to implement AI in augmenting or automating tasks.

Rating	Description
1	Not met at all / no evidence
2	Very weakly met / mostly missing
3	Partly met / important gaps remain
4	Mostly met / only minor gaps remain
5	Fully met / clear evidence exists

Items marked **[B]** are absolute blockers and can only be rated 1 or 5.

Table 10: AI Adoption Assessment Checklist (Version 4)

Theme	ID	Item	Rating	Imp.
T1 — Expected Benefits	T1.1	Important professional decisions are still made by human employees and are never completely handed over to the AI system.		**Critical**
	T1.2	The amount of human supervision required for an AI tool matches the level of risk involved in the task it is helping with. Higher-risk tasks require more human supervision.		**Critical**
	T1.3	Any decisions made with the help of AI can be easily tracked back to their source, reviewed by a person, and fixed if needed.		**Critical**
	T1.4	The organization uses reliable and consistent standards to check if the work produced with AI meets the required quality levels.		**High**
	T1.5	There is a clear and defined difference between tasks done entirely by humans, tasks where humans use AI for help, and tasks done completely by AI.		**High**
	T1.6	Before using AI, the organization measures how long tasks currently take, how much work is being done, how often mistakes happen, and the quality of the final product. This baseline is used to carefully decide if adding AI is actually necessary.		**High**
	T1.7	The AI system is brought in as a helpful tool to make employees' mental workload easier, not as a way to measure or judge their job performance.		**Medium**
	T1.8	The organization has carefully evaluated whether speeding up work using AI actually makes sense for its overall strategy and goals.		**Medium**
	T1.9	Previous uses of similar AI tools have proven they can actually improve productivity in measurable ways.		**Medium**
T2 — Anticipated Risks	T2.1	**[B]** The IP (intellectual property), authorship and copyright implications of AI-generated outputs are assessed against applicable laws before deployment.	1 5	**Critical**
	T2.2	**[B]** Responsibility for AI-supported decisions is clearly assigned to a specific human role.	1 5	**Critical**
	T2.3	The organization has assessed cybersecurity risks associated with the AI system, including data poisoning, unauthorized access, and model manipulation.		**Critical**
	T2.4	Protocols exist for handling AI errors and malfunctions.		**Critical**
	T2.5	Workers understand when outputs should be questioned or rejected and can critically explain their decisions regarding AI outputs and identify known failure modes.		**High**
	T2.6	There is a clear plan in place to make sure employees continue to use their own expertise and independent judgment, even when using AI tools.		**High**
	T2.7	Deskilling risk has been explicitly assessed and there's a plan to protect workers from those risks.		**High**
	T2.8	The mental and social impacts of using AI have been evaluated. Employees have a way to report if the AI causes them stress or makes them feel a loss of control, and their overall well-being is monitored.		**Medium**
	T2.9	The organization has evaluated how using AI will affect employees with different levels of experience.		**Medium**
	T2.10	Bringing AI into the workplace does not force unreasonably high performance expectations onto employees.		**Medium**
T3 — Mitigation Strategies	T3.1	**[B]** Several qualified employees are given enough time to properly review the work produced by AI, and they have the power to change or reject it if necessary.	1 5	**Critical**
	T3.2	**[B]** There is a clear, written backup plan for how to do the work entirely by hand if the AI system breaks down or goes offline. Employees are trained on this manual process, and the tools they need to do it are kept available.	1 5	**Critical**
	T3.3	**[B]** Affected workers participate in choosing the AI tool, defining task boundaries, and designing deployment protocols.	1 5	**Critical**
	T3.4	Sensitive organizational data is protected from AI systems.		**Critical**
	T3.5	Everything the AI produces is checked against the specific professional rules and quality standards for that particular field before it is used.		**Critical**
	T3.6	After the AI is put into use, the company has a plan to regularly check if employees are losing their skills, if the quality of work is dropping, or if employee well-being is suffering.		**High**
	T3.7	Reskilling combines domain expertise with AI literacy, including AI limitations and biases.		**High**
	T3.8	The AI system communicates its reasoning in terms that workers can understand and use during output evaluation and flags outputs that require caution, additional review, or lower confidence.		**High**
	T3.9	Vendor agreements define responsibility for AI errors.		**High**
	T3.10	The organization clearly communicates why AI is being adopted, how roles may change, and handles workers' concerns about AI via a protected reporting process.		**Medium**

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Table 10 – *Continued from previous page*

Theme	ID	Item	Rating	Imp.
	T3.11	A rotation procedure is used to keep workers reviewing AI outputs completely attentive to uncommon mistakes so that they do not repeatedly overlook the outputs.		Medium
T4 — Organizational Readiness	T4.1	**[B]** The company's lawyers have reviewed all the relevant laws and regulations to ensure the use of the AI is entirely legal.	1 5	Critical
	T4.2	The organization verifies that the data used by the AI system meets quality, completeness, and consistency requirements.		Critical
	T4.3	Compatible IT infrastructure is ready for deployment.		Critical
	T4.4	Specific roles are responsible for monitoring AI outputs and have clear authority to flag, escalate, or reject problematic results.		Critical
	T4.5	Employees are educated enough about AI to properly judge its work and spot its flaws. This ensures they can continue making their own professional decisions without blindly trusting AI outputs.		High
	T4.6	Leadership has established documented objectives and accountability structures for AI use.		High
	T4.7	Leadership makes it completely clear what they expect from humans when it comes to supervising and checking the AI.		High
	T4.8	Before implementing AI, the company figured out what skills their employees currently lack. They also determined if they could fill those gaps by training current workers, moving people to different roles, or hiring new staff.		Medium
	T4.9	HR policies and procedures have been updated to fit a workplace where people and AI work alongside.		Medium

V4 Decision Logic. Items have different importance levels and weights. Rate all items (1–5), then calculate the weighted total using the table below.

Importance	Weight
Critical	×1
High	×0.5
Medium	×0.25

Scoring Table: Sum ratings by importance level, multiply by weight, then sum the three weighted scores.

Importance	Items	Max raw	Sum of ratings	Wt.	Weighted
Critical	16	80		×1	
High	13	65		×0.5	
Medium	10	50		×0.25	
Total	**39**	**195**			**/125**

Score	Verdict	Implication
100–125 (≥80%)	Adopt	Proceed with governance and monitoring.
75–99.75 (60–79%)	Conditional	Resolve gaps before or during adoption.
38–74.75 (30–59%)	Defer	Close significant gaps first.
0–37.75 (<30%)	Do not adopt	Conditions not met.

Absolute Blockers. Any blocker rated 1 caps the verdict at Defer regardless of total score: **T2.1** (IP unassessed) · **T2.2** (no accountability) · **T3.1** (no oversight) · **T3.2** (no fallback) · **T3.3** (no worker involvement) · **T4.1** (no legal review).

VERDICT: _____ TOTAL: ____ / 125

G Reference Files

All reference files can be found here: *https://drive.google.com/drive/folders/1vE0RXpVDRuyH37WaZaG6Jl9RgVNdOYDu?usp=sharing*