AI Adoption Checklist for Public Agencies

For federal civilian, state, local and tribal teams putting AI tools to work. Public agencies carry obligations most organizations do not: records and disclosure, privacy for the people they serve, authorization for tools, and the expectation that any decision can be explained. Settle these questions before, not after, a tool goes into daily use.

01 Ownership and governance

- [ ] One named owner is accountable for how the agency uses AI.
- [ ] There is a simple inventory of where AI is used, by whom and for what.
- [ ] New uses are reviewed before they start, with more scrutiny for anything that affects people's rights, benefits, safety or access to services.
- [ ] Staff know who to ask, and how to report a problem with an AI tool or output.

02 Tools and authorization

- [ ] Only tools that have gone through your agency's security and procurement review are used for agency work (for example, cloud authorization requirements that apply to you).
- [ ] You know whether the vendor keeps, reviews or trains on what staff enter, and the contract says so.
- [ ] Tools meet your accessibility requirements (for federal agencies, Section 508).
- [ ] Personal accounts and free consumer tools are not used for agency work unless policy allows it.

03 Data

- [ ] Staff have a clear, short list of what may go into each tool and what never may.
- [ ] Personal information about the public, and other restricted categories your agency handles (such as tax, health, criminal justice or controlled unclassified information), stays out unless a tool is specifically approved for it.
- [ ] Staff use the minimum information needed for the task.
- [ ] Sample or de-identified data is used for training and experiments.

04 Records, disclosure and transparency

- [ ] Your records officer has said whether prompts and AI outputs are records, and how long they are kept.
- [ ] AI can help sort and search for a records or FOIA request, but trained people make every release and withholding decision.
- [ ] Public-facing content drafted with AI is reviewed and approved like any other content.
- [ ] You have decided when and how to tell the public that AI was used.

05 Human review

- [ ] Every AI-assisted product has a named reviewer before it is used or published.
- [ ] AI does not make or recommend decisions about individuals (eligibility, enforcement, hiring, benefits) without a specific review and approval process.
- [ ] Reviewers check facts, figures, citations and dates against the source, not just whether the text reads well.
- [ ] There is a way to correct and learn from errors that get through.

06 People and training

- [ ] Every employee gets a short baseline: what AI can do, where it fails, and the agency's rules.
- [ ] Staff who use AI daily get hands-on practice on their own kind of work, with verification built in.
- [ ] Leaders understand enough to judge vendor claims and set priorities.
- [ ] Staff acknowledge the acceptable use policy.

07 Measuring whether it works

- [ ] Each use starts as a pilot with a clear measure: time saved, backlog reduced, error rate, satisfaction.
- [ ] Results are compared with how the work was done before.
- [ ] Pilots that do not deliver are stopped, and the reasons are written down.

08 Questions to ask any AI vendor

- [ ] Where is our data stored and processed, and who can see it?
- [ ] Is our data used to train or improve your models? Can that be turned off in the contract?
- [ ] What authorizations, certifications and accessibility conformance do you have?
- [ ] How do we export our data and logs, and what happens to them when the contract ends?
- [ ] How do you tell us about errors, outages and changes to the model?

09 A 90-day starter plan

When	What
Days 1–30	Name the owner, list current uses, publish a one-page acceptable use rule, pick one or two low-risk pilots (for example, plain-language notices or meeting summaries).
Days 31–60	Train the pilot teams hands-on, set review steps, and measure the pilot against the old way of working.
Days 61–90	Decide what to keep, change or stop; brief leadership; plan training for the wider workforce.

> More free help: the **AI Basics** course (boulevardcg.com/learn), the anonymous **Team AI Skills Assessment** (boulevardcg.com/team-assessment), and AI training for public agencies at boulevardcg.com/training/government.