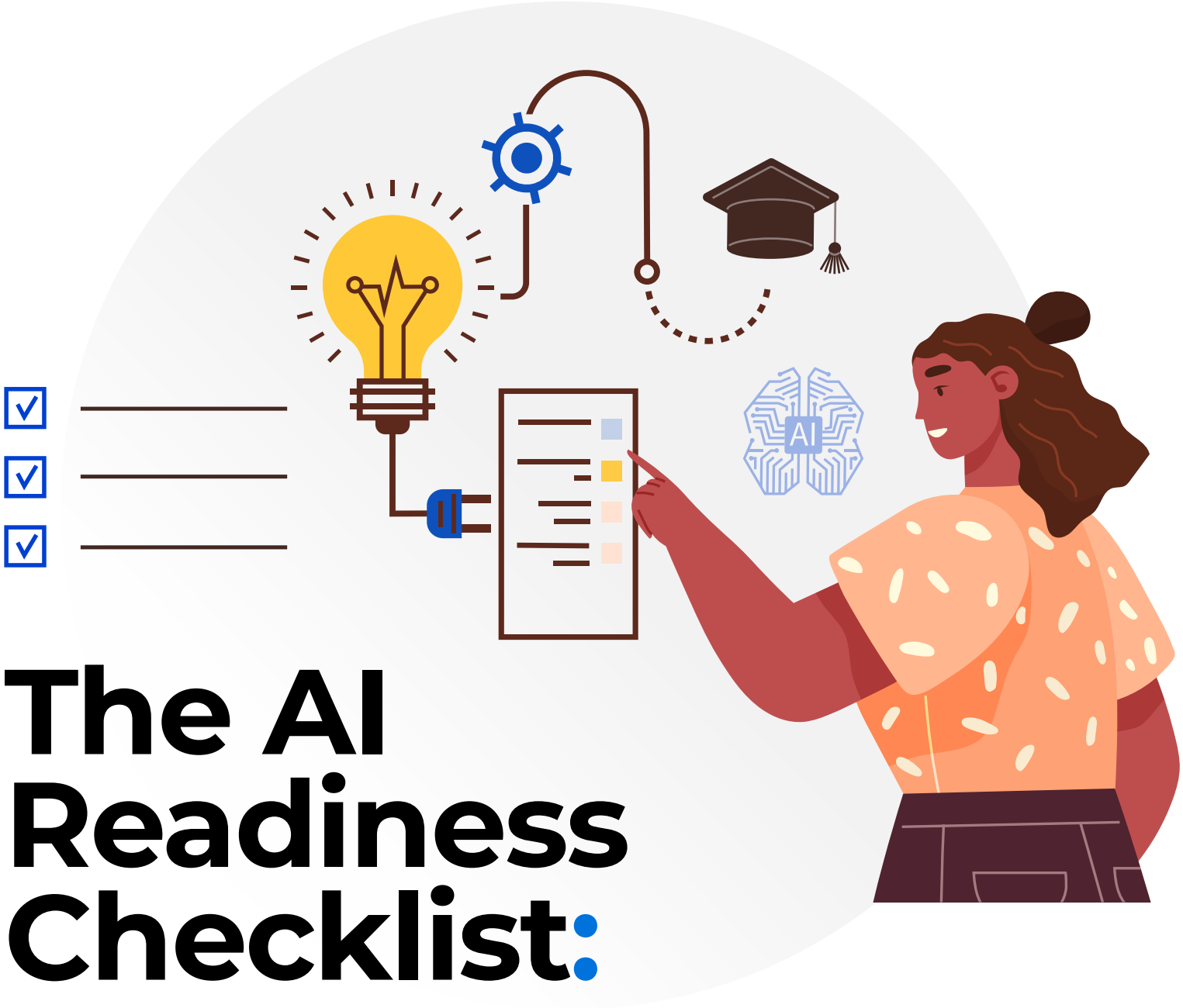
A **CENTER FOR DIGITAL EDUCATION** THOUGHT LEADERSHIP PAPER

CENTER FOR DIGITAL EDUCATION



The AI Readiness Checklist:

What Education Leaders Need to **Get Right First**

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AI can help higher education leaders stretch limited resources and stay agile and resilient. But only if institutions have the right foundation.

"Public trust in education has eroded, and rebuilding it can be addressed by showing progress, providing better metrics and demonstrating greater attention to student success," says Center for Digital Education (CDE) Senior Fellow Ron Bergmann, former vice president of information technology and CIO at Lehman College. "One of the tools that will be an asset in this work is AI."

The State Of AI

Education organizations are experimenting with AI use cases in key areas, including:

Administration and operations. AI tools can streamline routine headaches such as managing purchasing orders or inventories. Agentic AI will automate even more complex, multistep processes.

Teaching and learning. Faculty members are using AI to help develop instructional materials and enhance classroom support. Integrating AI into learning management systems could eventually provide personalized learning.

Student experience. Many institutions have deployed chatbots to answer student questions. More sophisticated tools will help monitor their academic progress, improving early alert systems that support struggling students.

"Institutions are experimenting, but higher education in particular is moving more cautiously than other industries — and understandably so, given the need for careful, strategic investments," says Bergmann.

That caution is well founded: In a fall 2025 CDE webinar, only 37% of participants said they were adequately funded to meet day-to-day needs, and just 13% reported being well funded compared to their peers.[1] "Everyone is trying to strike a balance between innovation and the operational demands that require their daily attention," says Jason Hardy, CTO for AI at Hitachi Vantara.

Not all organizations are seeing returns on their early AI investments. An MIT study released in August 2025 found that 95% of AI projects have yet to yield measurable results.[2]

That may be because education entities face challenges with assembling the core building blocks for successful AI implementation. These limitations include resource constraints, misaligned expectations, siloed experiments, incomplete or inaccurate data, privacy concerns, and overlooked security considerations. These gaps must be addressed if institutions are going to adopt AI in all areas of the enterprise. Education organizations "tend to be silo-driven," Bergmann says. "The challenge is to ensure innovations can scale across the institution."

Addressing these issues requires careful collaboration and methodical implementation. "There's no overnight success," says Hardy. "It costs more than you think, and being prepared will take more effort than you originally thought. It takes time, effort and money — and you don't get to choose two of the three."

A Checklist For AI Readiness

Understand where your organization is.
It's crucial to identify gaps in resources, technology and supporting infrastructure.

- ☑ **Ensure that IT infrastructure can support increased AI capacity as usage scales.** Don't neglect the technology that supports AI compute, including storage, networking, cloud and other tools. "GPUs are the core, but they're only as effective as the technology that supports them," Hardy says.

- ☑ **Evaluate existing security and privacy practices.** Determine whether sensitive data is properly protected. "AI generates data but is also a consumer of data, so it must be treated as any other user, including rights access, controls and security," Hardy says.

- ☑ **Determine the capacity of hybrid IT environments.** Organizations need a hybrid cloud model that can enable the power of cloud compute for some use cases, as well as on-premises capabilities for projects that draw from sensitive research or student data.

Understand where your stakeholders are. Examine how AI is being embraced or resisted across institutions, and explore the governance and policy frameworks shaping its use.

"AI has such broad impact that not having that point of view across all these disciplines starts to create blind spots," Hardy says.

- ☑ **Inventory existing use cases.** Look for examples of collaboration across multiple departments or disciplines.

- ☑ **Understand any reasons for resistance.** Common examples include administrative staff worried about losing their jobs and faculty concerns about student misuse.

- ☑ **Find strong sponsors.** Potential AI champions include senior leadership, faculty and staff in individual departments or disciplines, and subject matter experts in specific areas, such as HR or payroll.

- ☑ **Assess governance structures.** This can be a complex task in education, which often has "excessive committees and organizational layers" that can slow progress, Bergmann says.

- ☑ **Identify existing legal, compliance and privacy frameworks.** These often serve as the building blocks for AI policies.

Understand your data. Data must be properly cataloged to assess its relevance and suitability for specific needs and use cases. Ensure institutional data is:

- Accurate
- Consistent in formatting and metadata
- Used appropriately for current use cases
- Free from bias or sensitive information that would preclude its use
- Capable of being exported or aggregated from siloed systems in different departments
- Appropriately secured so only pre-determined people can access different types of data

A Strategy For Success

Implementing AI at scale isn't primarily a technology problem. It is often an organizational and change management hurdle.

In thinking through change management for AI, "we need to be a lot more strategic on what's targeted, but tactical on how we execute," Hardy says.

Among the steps:

Plan and Prepare

Achieving business readiness for AI means identifying the right pipelines and workloads to align with organizational goals. "We need to stop viewing AI as a standalone product and start seeing it as a tool to achieve meaningful outcomes," says Hardy.

- **Work backward from outcomes.** Identify both short-term opportunities, such as automating simple administrative tasks that can yield immediate cost and time savings, and longer-term goals, including more complex use cases supporting learning and student success.
- **Examine data to determine what's possible.** Data readiness, including understanding the parameters of the data you have and how it can be appropriately used, will help define the right use cases for AI.
- **Start with small and functional use cases.** Once short-term opportunities are identified, IT leaders can draw on their existing process engineering skillsets to identify high-value quick wins. "It's the lower-hanging fruit that we can learn from and engage in, and if something goes wrong, it doesn't drastically impact the organization," Hardy says.
- **Use the same rollout controls as other IT projects, including extensive testing.** Even small-scale AI experiments must be closely monitored to ensure they follow the same security standards and controls as the data sources they rely on. "That data now lives within the model itself," Hardy says. "It's critical to keep it within the proper context, prevent drift and maintain guardrails so that only the right people have access."

Build the Right Team and Community

Institutional change requires cross-functional teams, internal and external partners committed to adoption, and the right technology providers to build a foundation for sustainable growth.

- **Create effective cross-functional teams to support collaboration and scale.** Participants should understand the potential value of AI but be practical about its limitations to set expectations. Make sure stakeholders participate in clear decision-making processes. Broad participation "is essential to engage stakeholders and accelerate initiatives beyond individual silos," Bergmann says.
- **Streamline existing governance structures to reduce barriers.** Bergmann points to "Governance 2.0," which replaces longstanding decision-making structures with ones designed to quickly assess conditions and provide faster feedback loops. For example, he says, IT and data governance structures could be consolidated to reduce barriers to implementation and speed progress, although senior leadership will have to buy into such changes in many cases.

Technology partners can provide capacity early in AI adoption and then build on staff capabilities to ensure a smooth transition.

- **Identify internal and external partners to accelerate adoption.** Include internal departments at all levels and faculty to ensure students learn needed AI skills. External partnerships may involve collaborations with other educational institutions, public sector entities, local industries or broader consortia such as the GovAI Coalition.[3]

  CIOs should also consider developing their own peer networks of leaders from other education organizations and the private sector to serve as a sounding board for AI efforts.

- **Choose technology partners to close gaps and build a solid foundation.** Partners can draw from their expertise with other education organizations — and other industries — to provide an "independent lens" on what is needed, according to Hardy.

  Technology partners can help identify proof points and then develop a flow of services and capabilities to meet them. For example, they can deploy data lakehouses to aggregate information from siloed systems for AI use. Partners can also identify opportunities to augment the energy consumption of GPUs, such as flash drives that consume less energy than traditional storage. "Modernization is about the downstream benefits — better energy consumption, better ESG footprint, more sustainable systems," Hardy says.

  Importantly, technology partners can also provide capacity early in AI adoption and then build on staff capabilities to ensure a smooth transition. "Having that kind of partner is almost like having a trainer at the gym," Hardy says. "Without it, the initiative turns into a waste of money and people wandering around blindly."

Educate, Communicate, Learn

For AI's benefits to scale, the entire organization, including leaders, faculty, staff and students, needs to understand the rationale and how to use new tools. "AI is a team sport," Hardy says. "You have to work with your stakeholders to get it right."

- **Train the entire organization.** Include detailed professional development for power users and IT staff, as well as basic AI literacy for everyone so they can use the technology for their own purposes and recognize hallucinations and ethical issues. With tools that allow end users to create powerful agents, it's important to "put the same amount of energy into training those consuming AI as those building it," Hardy says. "They are two very different types of training, and we need to treat them equally."

- **Address fears and resistance through communication.** Communicate regularly at all levels, with an emphasis on helping stakeholders see the value in using AI. "There are people who need and ask for data but aren't able to access it in a way that is useful to them," Bergmann says. "If you can get them to see the strategic value of the change, they become part of the process and serve as advocates."

  To that end, educators can draw from their own expertise to design project-based learning opportunities that result in new use cases and capabilities. "The approach with faculty and staff who may be resistant is to engage them in the process of co-determining their needs and involving them in pilot projects," Bergmann says. "If done in an authentic way, it can build trust and ownership."

- **Keep on top of evolving ethical and privacy considerations.** Specific guidelines and the broader ethical considerations that require them are continuing to evolve, requiring leaders to remain flexible as they consider how to safeguard data. “It’s not a science. It’s more of an art,” Hardy says. But, he adds, “without proper policy inside of the organization, it gets very challenging to figure out where to draw the line.”

  When developing AI principles and guidelines, don’t start from scratch. Draw from state or system guidelines if they are available, along with your organization’s existing privacy and data policies. Organizational leaders can also collaborate with national organizations to develop principles and share implementation experiences and best practices. It’s also important to keep your organization’s legal office or representative in the loop.

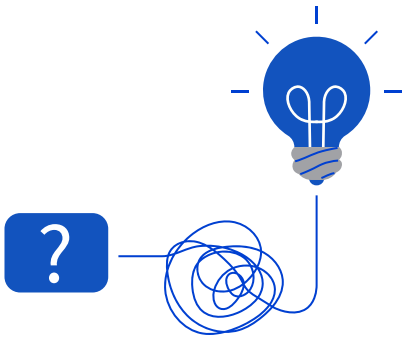
  Stakeholders need visibility into the supporting services and data that drive AI models to ensure the right information is being used in the right ways. Since AI models remain opaque, policies should err on the side of protecting individuals and data. “This is not a clearly defined space yet,” Hardy says. “With that comes being realistic about the limitations and realizing that if you want to expose this to sensitive data, you need to be careful and prescriptive.”

  Since privacy and ethical considerations continue to evolve, leaders must inform all stakeholders, including end users, about ongoing changes to data privacy and transparency policies.

Adapt and Evolve

Once AI solutions are deployed, leaders must report the impact, track progress and shift priorities as needed.

- **Track progress with the right metrics.** Initial metrics for AI projects should be quantitative and specific, as they may be assessed with skepticism by resistant stakeholders.



  As AI use cases expand and mature, institutions should adopt broader metrics that go beyond traditional benchmarks by incorporating qualitative insights, anecdotal evidence and comprehensive measures of student success. Equally important is embedding reporting capabilities within AI-powered solutions to effectively track their impact.

  Even unsuccessful use cases can yield productive results. Reframe ROI for discontinued projects to highlight the new staff capabilities acquired as the result of experimentation. “There’s still ROI gained from that failure,” Hardy says. “That goes against the grain, but AI is an emergent technology, and we can use what we learned to move on to the next thing.”

- **Be patient, but don’t be afraid to pivot as you scale.** Leaders must emphasize patience when outcomes don’t emerge immediately. “It can’t be, ‘It’s been six weeks, why don’t I have AI yet?’” Hardy says. “It’s like planting a tree. Leaders need to articulate that and back off.”

  At the same time, leaders must be willing to shift gears and prioritize use cases that directly impact student outcomes, including ones involved with learning outcomes, student engagement and satisfaction, retention, and other mission-critical metrics.

- **Keep the end goals in mind.** As progress accelerates, give the organization time to catch up with the technology. At the same time, leaders must reinforce the goal of using AI to support superior teaching and learning experiences for students and faculty alike. Doing so will allow AI to play a key role in keeping institutions relevant for years to come.

1. https://webinars.govtech.com/The-AI-Readiness-Checklist%3A-What-Education-Leaders-Need-to-Get-Right-First-143854.html
2. https://mlq.ai/media/quarterly_decks/v0.1_State_of_AI_in_Business_2025_Report.pdf
3. https://statescoop.com/govai-coalition-support-local-artificial-intelligence-governance/

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