



EGM Education and Training

Building a School AI Roadmap

A twelve-month AI adoption roadmap for a single school: sequenced against its own calendar, costed from its own numbers, owned by named people, and written so a governing body can interrogate it. Two to three weeks from kick-off to sign-off.

ENGAGEMENT OUTLINE · EDU-EX2 · SEPTEMBER 2026

For a single school, run in its calendar

- A defined-scope consulting engagement with seven named deliverables, not a course and not an open-ended advisory relationship.
- One facilitated half-day at the centre; the collection, the drafting and one structured review cycle around it.
- The school owns every deliverable, whether or not it ever works with us again.

Bought by the head, or by a deputy or business leader with the head's authority. Discovery is mandatory: no proposal is written before the discovery conversation.

Purpose

One document, made real

The engagement produces one thing: a roadmap the school can execute, with names against it, on the calendar it actually has.

The work runs over two to three weeks. We collect and read the school's position before anyone sits in a room; facilitate a half-day working session with the leadership team; draft the roadmap in the week that follows; and take it through one structured review cycle to sign-off. The half-day is the centre of the engagement, not the whole of it. A roadmap written live in a room by people who have not yet seen their own data is a wall of sticky notes, and it does not survive contact with the September timetable.

This is a working engagement on the school's specific strategic position. It is not a course, and nothing in it is generic.

SL1 teaches leaders to draft their own roadmap. This engagement produces the roadmap with you. School AI Transformation delivers it.

Read that as a real ladder, not a sales sequence. A capable leadership team that has run **EDU-SL1 Strategic AI Adoption for Schools** can draft its own roadmap and should. This engagement exists for schools that want the collection, the drafting and the challenge done by someone outside the school, and want it finished in three weeks rather than carried on a deputy head's to-do list for a term. Our position at discovery is to recommend the lowest rung that answers the question.

What it is not, and who should not buy it

- **Not an implementation engagement.** We produce the roadmap; the school executes it. Commissioned delivery is EDU-EX4, scoped separately.
- **Not procurement or vendor selection.** No tool is recommended by name as a commitment. Where an action needs a product, the roadmap names the requirement and the decision, not the supplier.
- **Not a data-protection or legal advisory service.** Where the roadmap touches personal data, it names the question and routes it to the school's own DPO.
- **Not for trusts or school groups.** One calendar, one budget, one governing body. A multi-school network buys EDU-EX1, which is built for the tension between a centre and its schools.
- **It will not tell you AI is the right answer.** "Do less of this than you planned" and "do none of this until the data-protection position is settled" are both roadmap outputs we have to be willing to write. The acceptance criteria do not require any particular level of adoption.

Sixteen working days, and a sign-off tail

Working days are school weekdays; holidays and INSET closure days do not consume a window. Elapsed calendar time is three to four school weeks depending on where half-term falls.

Stage	Days	What happens	Who
Pre-engagement	Before D-5	Discovery conversation (45 to 90 minutes). Written proposal. Acceptance record signed. Sponsor named. Workshop date fixed to a named school week; blackout weeks recorded.	Head or sponsor, with us
Phase 0, pre-work	D-5 to D-1	Kick-off call (30 minutes). Document request issued D-5, due D-2. Staff survey opens D-5, closes D-2. We read everything and issue the Pre-Workshop Read-Out to the sponsor at D-1.	School supplies; we read
The half-day	D0	Three hours thirty minutes of working time. Shape and timings on page 5.	We facilitate; five to nine school people attend
Phase 2, drafting	D+1 to D+5	Five working days. We draft the full deliverable set offline. One clarification email to the sponsor; no meetings. Draft pack issued end of D+5.	Us
Review cycle	D+6 to D+8	Three working days. The school returns one consolidated comment set from the sponsor, not separate comments from six people.	School
Revision pass	D+9 to D+10	Two working days. One revision pass is included. Final pack issued end of D+10.	Us
Sign-off	D+11 to D+15	The sponsor signs the acceptance record against the criteria on pages 6 and 7, within five working days of the final pack.	School

The fast path, and what it costs

Two weeks is achievable where all four of these hold: the document pack is complete at D-2 with no chasing; the survey reaches a response rate the sponsor is content to act on by D-2; the review window is compressed to two working days; and the sponsor is available on the review days. It is offered with its cost stated: a two-day review window means fewer people in school read the draft before it is signed, and the roadmap is weaker for it. We recommend the three-week path and say so in the proposal.

What is not compressed

The five-day drafting window is not negotiable downwards. The roadmap has to be sequenced against the school's real calendar, the arithmetic has to be done on directed-time totals, and every figure has to be traced to the person who supplied it. Producing that in two days means producing a document that looks the same and is not.

Before the room

We arrive having read the school, so the room spends its three and a half hours deciding rather than describing.

Documents requested, due D–2

Input	Supplied by	Why it is needed
Development or improvement plan	Head or sponsor	Every roadmap priority is traced back to a stated school priority.
Published calendar for the coming year	Business manager or calendar owner	Term dates, INSET days, examination windows, reporting weeks. A hard input: without it the workshop is rescheduled.
Governing body meeting dates and committee structure	Clerk to governors	Decision points are dated to real meetings, not to "Q2".
Software and licence list in scope	Business manager or finance lead	What is licensed, seat counts, annual cost, renewal date, notice period. This is the cost base.
Current CPD plan and committed directed time	CPD lead or deputy	Directed-time hours are a finite resource the roadmap consumes.
Existing policies that touch this	Policy owner or clerk	AI, acceptable use, online safety, data protection, staff conduct, with review date and owner.
Device and network position	IT lead or MSP	Devices, filtering, who administers machines, what staff and pupils can reach. Half of all roadmap actions die at the network.
Data-protection contact	Sponsor or DPO	Who the DPO is and any assessment already done. "Nobody" is recorded and appears in the roadmap.
AI work already under way	Sponsor	Schools almost always have more happening than leadership knows about.

Where an input does not exist, the gap is recorded as a gap in the Position Record, not estimated. A missing policy becomes "no current position", which is itself a roadmap finding.

The staff survey

Short and structured, issued through a link the school distributes, open five working days. It asks about current use by task, where staff have stopped using something and why, what they believe the school's position is, what they would want covered first, and what worries them. It does not ask for names, pupil information, or anything that could read as a performance question. Responses are pseudonymous: role band and phase only.

The Pre-Workshop Read-Out

Issued to the sponsor at D–1: four to six pages. What we found, what the survey said, the four or five tensions the workshop will have to resolve, and the questions the room will be asked to decide. The sponsor reads it before the room does; a factual error is corrected before the workshop, not during it.

The half-day

Three and a half hours of deciding

Working time 3 hours 30 minutes. Runs 09:00 to 12:30 or 13:00 to 16:30. On site by default.

Who is in the room: five to nine people

The head, or a deputy with the head's authority (required); the named sponsor; the IT lead; the business manager or finance lead; one or two middle leaders who will own actions; and the data-protection contact where data actions are likely. Larger than nine and the round stops working, because everyone has to speak.

Time	Block	What actually happens
0:00 to 0:20	Read-out and correction	We present the Position Record findings. The room's job is to correct them. Corrections are carried into the deliverable; this is a working step, not a presentation.
0:20 to 0:50	Priorities	Silent write, then a round: each person names the one thing that must be true in twelve months. Clustered on the wall against the school's stated improvement priorities. Anything that does not trace to one is challenged in the room.
0:50 to 1:05	Break	
1:05 to 1:50	Success statements	Pairs convert each cluster into an observable condition with a date. One test throughout: <i>how would you know?</i> A statement that cannot answer it is rewritten or dropped.
1:50 to 2:35	Sequencing on the school's own calendar	The term grid is on the wall with blackout weeks physically blocked out. Actions are placed. The directed-time budget is visible and is consumed as actions land. The calendar is a finite resource and the room watches it run out.
2:35 to 2:45	Break	
2:45 to 3:10	Cost class and owner pass	Every placed action gets a cost class and an owner by role. An action nobody will own is removed from the wall, not carried forward hopefully.
3:10 to 3:30	Risk and decision pass, and close	What could stop each first-term action; which decisions need the governing body and by which meeting. The sponsor states aloud the three actions that start first and when.

On site or remote

Phase 0 and Phase 2 are remote. The workshop is on site by default and remote by agreement. Remote delivery is a real offer, with its losses stated at quotation: the calendar grid becomes a shared board and stops being physical, which weakens the moment when the directed-time budget visibly runs out; the round takes longer; and the corridor conversation at the break, where the real objection usually surfaces, does not happen. Where a school is split-site or the leadership team cannot be in one place, remote is the better engagement.

Seven deliverables, each with a test

Acceptance criteria are testable statements: each can be answered yes or no by reading the document. A deliverable that fails a criterion is not accepted, and we fix it inside the included revision pass.

Deliverable	What it is	Accepted when, in brief
D1 Position Record	The school's current position, evidenced: tool and licence inventory, the staff practice picture, policy and governance position with owners and review dates, the data-protection position, device and network position, and the constraint list.	Every entry names the document or person it came from. No benchmark, average or comparison against any other school. The survey response rate is stated as a number and a percentage, with what it does and does not support. The business manager and IT lead each confirm their sections in writing.
D2 Priorities and success statements	Three to six priorities, each with an observable success statement.	Every priority traces to a school improvement priority or a named constraint. Every statement is an observable condition with a date. No statement claims a pupil attainment effect from AI adoption, and the document says why. Fits on one page.
D3 The twelve-month roadmap	Actions across the year in terms and school weeks, with owners, dependencies and decision points.	Every action has an owner by role, a term-and-week window, a prerequisite or "none", and its decision and decider. Nothing sits in a blackout week. Every action serves a priority and every priority has an action. Directed-time hours are totalled per half-term against the stated budget. Where an action could be delivered by us, an alternative route not involving us is named next to it.
D4 Cost-base and resource sheet	What the roadmap costs the school, built from the school's own numbers.	Every figure carries its source, date and the person who supplied it. Every action carries one cost class: new spend, redeployed existing spend, directed time only, or no cost. The sheet states in its header that no figure is a comparison with another school. The business manager confirms it in writing.

Continued overleaf: D5 to D7, and what replaces cost benchmarking.

Measures, governance and the governor summary

Deliverable	What it is	Accepted when, in brief
D5 Progress-measure set	Four to eight measures the school can actually collect.	Each names what is measured, who collects it, how often and from where. Each owner confirms it is collectable in under 30 minutes. At least one workload measure and one measure of whether the school did its part. No attainment measure attributed to AI. Every measure has a baseline or an explicit "first collection is the baseline".
D6 Governance note	Who owns the roadmap and how it is reviewed.	Owner and deputy by role; review cadence dated to the school's own meetings; which decisions are the owner's, SLT's and the governing body's; the escalation route and its trigger. One side of A4.
D7 Governor summary	Two pages for the people who approve the spend and carry the duty.	Answers five questions in order: what are we doing, why now, what it costs in money and staff time, what could go wrong and who is watching, how we will know it worked. No supplier presented as a commitment; no statistic without a named source and date; no reference to other schools' results. The sponsor reads it to one non-technical governor before sign-off, and that governor can restate it.

What replaces cost benchmarking

We hold no cost dataset from other schools, have not surveyed a comparison group, and will not produce a figure that reads as market evidence when it is an estimate. A benchmark number in a budget paper carries weight it has not earned, and a governing body is entitled to ask where it came from.

What replaces it is the school's own cost base made explicit, which is defensible in a finance committee:

- **What the school already spends** on the licences, subscriptions and services in scope, with renewal dates and notice periods. Most schools discover something here.
- **What the school already commits in directed time and CPD budget**, and how much is uncommitted: the real constraint more often than cash.
- **What the processes in scope cost in staff time**, counted by the school over one ordinary week on a sheet we supply.
- **The school's own procurement thresholds and approval route**, so decision points land in the right committee at the right time.
- **Supplier list prices where a figure is needed**, each with its source and read date, labelled as a list price rather than as what the school will pay.

Where a figure is not knowable, the sheet says "not known" and names who would need to find out.

What the school supplies

The time ask: about 18 to 22 person-hours, excluding the survey

Who	When	How long
Sponsor	Kick-off call, chasing the document pack, reading the read-out, the workshop, consolidating comments, sign-off	6 to 8 hours across three weeks
Business manager or finance lead	Licence and cost data, calendar, confirming D1 and D4	2 to 3 hours
IT lead	Position sheet, confirming D1	1 to 2 hours
Clerk to governors	Meeting dates and committee structure	15 minutes
Head or deputy	Workshop	3.5 hours
Middle leaders, one or two	Workshop	3.5 hours each
DPO or data-protection contact	Position question; workshop where data actions are likely	30 minutes to 4 hours
All teaching staff	Survey	8 to 10 minutes each

If the school cannot supply this, the engagement will produce a document rather than a roadmap, and we say so at discovery rather than after.

Scope

In scope: structured collection of the school's position and the Position Record; facilitation of the half-day; drafting of all seven deliverables; one revision pass against one consolidated comment set; the governor summary; sign-off against the criteria.

Out of scope unless separately agreed and separately scoped: delivery of anything in the roadmap, including training, policy writing, implementation and project management; procurement, vendor selection, contract negotiation or licence purchasing; writing or approving the school's policies; completing the school's DPIA or acting as or advising the DPO; infrastructure design, specification or deployment; recruitment, HR process or anything touching an individual's appraisal; communications beyond the governor summary; any work after sign-off. There is no drift period; further work is a new scope.

Acceptance, review and change

The named sponsor accepts, in writing, against the criteria. One person. The review window is three working days, counted in school weekdays. The school returns one consolidated comment set; we do not reconcile six people's conflicting comments, because reconciling them is the sponsor's judgement to make. One revision pass is included and covers anything that fails a criterion, factual corrections and the sponsor's consolidated comments. A second full pass, or a change of direction after sign-off, is a change request with its own scope. A deliverable rejected against a criterion is ours to fix at no further cost; a deliverable rejected because the school has changed what it wants is a change request. The distinction is the criteria list, which is why it is written before the work starts.

What the school keeps, and how its data is handled

The school owns its roadmap

The seven deliverables are the school's property. The school may amend them, circulate them internally, share them with its trust, diocese or local authority, present them to its governing body, publish them, and go on using them indefinitely, including if it never works with us again and including if it takes the roadmap to a different provider to deliver. We withhold nothing to secure further work, require no attribution, and place no restriction on the school's use of its own strategy. Our own pre-existing materials, the survey instrument, facilitation method, run-sheets, cost-class framework and templates, remain ours; the school receives a perpetual licence to use the copies supplied for its own internal purposes.

Data

We take no pupil personal data in this engagement, and none is needed. We receive school documents and a pseudonymous staff survey carrying role band and phase only. We do not receive pupil records, pupil work, attendance, assessment or behaviour data, safeguarding information, staff personal files or class lists. The school distributes the survey through its own channels. Where a survey response or document nonetheless contains personal data, we act as processor on the school's written instructions under a written data-processing agreement. Free text is returned to the school in full with any response identifying a named individual redacted first. Sub-processors are named at contract and the school approves any change. No school document or survey response is put into a public generative AI tool by us.

Whether a data protection impact assessment is required is the school's decision, taken by its DPO. Where the roadmap proposes anything that touches pupil or staff personal data, the deliverable names it as a DPIA question, routes it to the DPO by name and dates the decision to a real meeting. We supply a plain description of the processing as an input and attend the DPO's review. We do not complete, sign or approve the school's DPIA. The framework is UK GDPR and the Data Protection Act 2018 as amended by the Data (Use and Access) Act 2025; we are not a data-protection advisory practice and do not give a legal opinion on the school's position.

Dates, postponement and closure

Terms are written in school weekdays and keyed to the school's own published dates, because a school cannot move a workshop into an exam window. At booking the workshop is fixed to a named school week, and the school's term dates, INSET days, examination windows, reporting weeks and parents' evenings become blackout weeks we do not schedule into. Where no non-blackout week exists, the engagement pauses to the following term rather than compressing into an unsuitable one; after a pause of more than a full term the survey is re-run and the licence and calendar data refreshed, because a position record about a school is perishable. Emergency closure is postponement with no notice consequence. On cancellation by either party, any deliverable already accepted remains the school's without condition, and work in progress is issued as a draft and is also the school's. Notice periods and the consequences of short-notice postponement are stated in the proposal.

Confidentiality

We will not name the school, quote it or describe it as a client in any material without written permission. We publish no client case studies of any kind, and nothing in this engagement creates one.

How it starts

Every consulting engagement begins with a discovery conversation of 45 to 90 minutes. It is not optional and it is not a sales call with another name. It covers the school's current position and what has prompted the question now; the specific decision the school needs to be able to take; who the sponsor would be and whether they have the authority and the hours; the calendar, including blackout weeks; the data position; scope confirmation; and the basis for the proposal. A written proposal follows within an agreed timeframe. No prices appear in this outline: scope and fee are set at discovery and stated in the proposal. Three things move the scope: single-site or split-site; on site or remote; and whether the school's data comes in complete at D-2 or has to be assembled.

We will decline the engagement where the school cannot name a sponsor with authority, where no workshop week exists outside the blackout windows in a reasonable horizon, or where what the school actually wants is delivery rather than a roadmap, in which case the conversation moves to School AI Transformation or to the relevant courses, and says so.

The courses and engagements around it

Course	How it relates
EDU-SL1 Strategic AI Adoption for Schools	The course version of this work. A school that has run it arrives with a draft to argue about. Recommended precursor, never required.
EDU-SL2 AI Policy, Governance, and Risk	Where it has run, the roadmap records the policy work that exists rather than scheduling it again.
EDU-SL5 AI Briefing for Governors and Boards	A board that has had the briefing interrogates the governor summary properly.
EDU-EX3 Local AI Infrastructure for Educational Institutions	Where a build-or-buy question is live. We offer build services and name that conflict rather than hiding it.
EDU-EX1 AI Strategy for School Groups and Networks	The right product for a trust or network; this engagement does not scale to a group by being run several times.
EDU-EX4 School AI Transformation	Where the school commissions delivery as well. These deliverables feed its Gate 2 directly and are not re-done.

Talk to us

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The full engagement specification, with every acceptance criterion, is available on request before you commit to anything. Named biographies, DBS and insurance positions for the people who would deliver it are supplied at proposal stage.

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