



EGM Education and Training

School AI Transformation

Delivery of a school's AI programme across two to three terms: discovery, strategy, policy, staff development, departmental embedding and handover, in six stage-gated phases under one governance structure, with a defined end.

ENGAGEMENT OUTLINE · EDU-EX4 · SEPTEMBER 2026

For a single school, mapped to its academic calendar

- The board can stop after any gate and keep what it holds. Every stage is independently valuable.
- One INSET day across the whole programme. Everything else runs in directed time, department meetings, curriculum time or the evening.
- Completion is defined: the engagement ends when the Gate 6 deliverables are accepted in writing, not on a date.

Bought by the head with the governing body's authority, because it spans a governance year. Discovery is mandatory: no proposal is written before the discovery conversation.

Purpose

A decision, delivered

The programme delivers a decision the school has already taken. It is built in six phases, each producing named deliverables with written acceptance criteria, each closing at a gate where the governing body decides whether to continue.

The gates are not project-management furniture. A school committing two or three terms of directed time and budget to a single provider is taking a risk that a two-page brochure cannot address, and the honest answer is to make every stage independently valuable. A board that stops after Gate 2 has a strategy it owns and can deliver itself, or with someone else. That is what makes this engagement commissionable rather than a leap of faith.

Defined completion

We do not sell "a fully AI-enabled school". The phrase has no test, no completion condition and no way for a governing body to hold a provider to it. The engagement is complete when the deliverables at Gates 1 to 6 have been accepted in writing by the named sponsor against the criteria on pages 8 and 9. Not before, not after, and not on a date. At completion the school holds:

- A **Position Report** on its own starting point, evidenced and sourced.
- An **AI strategy and multi-term roadmap**, sequenced against its own calendar, costed from its own numbers, with named owners.
- A **bounded set of policy drafts**, prepared for the school's own professional review and its governing body's approval, with the record of which reviews were obtained.
- A **risk register** the school maintains.
- A **delivered staff development programme** against a cohort plan, with practice evidence and evaluation summaries at Guskey levels 1 to 4.
- A **CPD pathway mapped to the school's year calendar** that the school can run itself, with any provider or none.
- **Amended schemes of work and a production workflow** in named departments, with worked exemplars.
- A **programme evaluation report and a governor report**.
- A **handover pack and a twelve-month continuation plan**, owned by named people in school.

What the school does not hold at completion

Any claim about pupil attainment. We do not measure it, attribute it or claim it. The evaluation measures changed practice, workload, coverage and organisational follow-through, which are the things this engagement can actually evidence. The reason is on page 13.

Who should not buy it, and what constrains it

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

The ladder is real and the rungs are different products. A school does not have to climb it in order, and our position at discovery is to sell the lowest rung that answers the question. A school that needs SL1 and buys this programme will be unhappy two terms later, and rightly.

Who should not buy it

- **A school that has not decided.** This engagement delivers a decision that has been taken. A school still asking whether to do this should buy EDU-SL1 or Building a School AI Roadmap first, and may not need this afterwards.
- **A school that cannot supply the time.** Page 7 states the calendar ask in INSET days, directed-time hours and evening sessions. If the school cannot commit it, the programme will underdeliver and we say so at discovery.
- **A trust or school group.** One calendar, one budget, one governing body. Networks buy EDU-EX1 and scope delivery per school from there.
- **A school wanting legal or data-protection assurance.** We draft policy for the school's own review; we are not a law firm, not a DPO service, and do not give legal advice.
- **A school wanting an infrastructure build.** That is a separate workstream, separately scoped, and optional here on purpose.

The constraint is the calendar, not the effort

INSET scarcity. A school has roughly five INSET days a year and two or three are pre-committed before any external provider is in the conversation. A programme that assumes three of five is not a programme, it is a wish. This engagement asks for one INSET day across the whole engagement.

Governor meeting cycles. Decisions that need the governing body cannot be taken between meetings, and a policy pack that arrives the week after the meeting waits a term. The school's own board and committee calendar is a Phase 1 input, and every gate that needs a board decision is dated to a real meeting with the paper deadline worked backwards from it.

Examination dead zones. Nothing is scheduled into the November and February mock windows or the May to June examination window. Those weeks are recorded at contract as blackout weeks and the phase map is built around them, not through them.

Six phases on the school's own term map

The September-start pattern. A January start runs the same sequence shifted, with the difference noted below.

Term	Phase	What runs	Gate at its close
Term 1, weeks 1 to 6	Phase 1, Discovery	Document collection, staff survey, IT and data position, DPIA support pack, calendar and constraint mapping	Gate 1, Discovery accepted
Term 1, weeks 7 to 12	Phase 2, Strategy	Leadership working sessions; strategy and multi-term roadmap; cost base; progress measures; governance note; board paper	Gate 2, Strategy accepted, dated to a governors' meeting
Term 2, weeks 1 to 6	Phase 3, Policy and governance	Policy drafting; risk register; professional-review routing; governor briefing	Gate 3, Policy pack accepted, dated to a governors' meeting
Term 2, weeks 3 to 12, into Term 3	Phase 4, Staff development	The cohort programme: whole-staff INSET, twilight cycles, department-meeting units, leadership and governor sessions, parent briefing	Gate 4, Development programme delivered
Term 3, weeks 1 to 8	Phase 5, Departmental embedding	Named departments amend schemes of work; production workflow; exemplars; departmental evaluation	Gate 5, Embedding accepted
Term 3, weeks 9 to 12	Phase 6, Evaluation and handover	Programme evaluation, governor report, handover pack, twelve-month continuation plan	Gate 6, Handover accepted
Parallel, optional	Local AI infrastructure decision	Build, buy or partner decision framework and, where the decision is to build, a separately scoped build	Optional gate

Why Phases 3 and 4 overlap

The overlap is deliberate and it is the school's calendar that causes it: the INSET day belongs to the school and sits where the school has already placed it, so the whole-staff day in Phase 4 lands on that date rather than on a phase boundary. One dependency runs across the overlap and is enforced at the gate: the EDU-T4 sessions, which teach the school's policy in the classroom, do not run before Gate 3 has closed. The whole-staff introduction may run before the policy pack lands, because it teaches the accountability floor every teacher works to whether or not the school has a policy yet.

Two terms or three

Three terms is the default. Two terms is offered where the school takes a narrower Phase 5, one department rather than three or four. What two terms does not do is compress Phase 4: the staff development cycles have gap tasks and follow-up touchpoints at two to six weeks, and squeezing them turns a cycle into a day.

January start

The sequence holds. Phases 1 and 2 run in the spring term; Phase 3 lands before the summer-term board meeting; Phase 4's whole-staff INSET moves to the September window of the next academic year. A January start therefore crosses a year boundary and needs the following year's budget approved at Gate 2, which is put in front of the board there rather than discovered in July.

The phases

What each phase does, and what it produces

Phase 1, Discovery

Structured collection of the school's actual position: document set, systems and licence inventory, device and network position, existing policy and governance position, a pseudonymous staff survey, and short interviews with the sponsor, the IT lead, the data-protection contact and two or three middle leaders. **Deliverables:** Position Report; Data-Handling Record and DPIA support pack; Constraints and Calendar Map.

Phase 2, Strategy

Two facilitated leadership working sessions rather than one, because the sequencing decisions and the resourcing decisions are different conversations and collapsing them produces a plan nobody has costed. Session A sets priorities and success statements against the school's improvement plan; Session B sequences actions on the school's own term grid with the directed-time budget visible and consumed as actions land, then assigns owners and cost classes. Every figure in the cost base comes from the school's own records or a supplier list price with its source and read date; we hold no cost benchmark data from other schools and present none. Where Building a School AI Roadmap has already run, its deliverables are carried in, reviewed for currency and extended rather than rebuilt; the school does not pay twice for the same roadmap. **Deliverables:** AI strategy and multi-term roadmap; cost-base and resource sheet; progress-measure set; governance note; cohort plan; board paper.

Phase 3, Policy and governance

Drafting of a bounded policy set, bounded because "a complete policy suite" is not a thing any provider can deliver for a school it does not govern, and because every additional document is one more thing the governing body has to review properly. The set is a staff AI use policy; a pupil use and assessment-integrity position; a data-protection annex covering the tools in scope; and a procurement and adoption checklist. Alongside them, a risk register the school will maintain and a governor briefing pack. Regulatory content is written against named instruments with their editions and dates stated, and re-verified at drafting rather than inherited from a template. **Deliverables:** the four policy drafts; risk register; governor briefing pack; professional-review routing record.

Staff development, embedding and handover

Phase 4, Staff development

Delivered from the EGM catalogue rather than improvised, so that every session has a specification, a session plan, a facilitator guide, a participant pack and instruments behind it, and so that the school could commission the same courses without the engagement if it chose. The cohort plan is agreed at Gate 2, not a Phase 4 surprise. Each staff course is delivered as a cycle: session, gap task in the participant's own practice, structured practice review at two to six weeks. This is the part most often cut for time and it is the part that determines whether anything survives. Everything touching individual practice is written in development terms, aligned to the school's own appraisal policy, and is explicitly not a capability procedure; where the school has recognised unions, the sponsor is advised at Gate 2 to route the programme through the school's normal consultation arrangements first. **Deliverables:** the delivered cohort programme; team practice maps; evaluation summaries per cohort at Guskey levels 1 to 4; the whole-school CPD pathway mapped to the year calendar.

Phase 5, Departmental embedding

Named departments, three or four in the three-term shape and one or two in the two-term shape, chosen at Gate 2, amend real schemes of work, build the department's production workflow and produce worked exemplars. Subject expertise is the department's; the workflow, the protocols and the critique discipline are ours. Every exercise uses the department's own curriculum documents or synthetic material. No pupil data. **Deliverables:** amended schemes of work; the department production workflow; worked exemplars; departmental evaluation.

Phase 6, Evaluation and handover

Handover is a working session, not a document drop: the named school owners walk through what they now run, and anything they cannot run without us is identified and either fixed or written down as a dependency the school knowingly accepts. **Deliverables:** programme evaluation report; governor report; handover pack; twelve-month continuation plan.

Optional parallel workstream: local AI infrastructure

Where a build-or-buy question is live, it runs as a parallel workstream with its own gate, not as a dependency of the main programme. The decision framework is taught by EDU-EX3, which reaches the answer "do not build" as readily as any other. We offer build services and name that conflict rather than hiding it: a provider that sells the build should not be the only voice in the decision, and the school is encouraged to take a second view. Any build is scoped and contracted separately.

What the school must supply, as arithmetic

Stated so the sponsor can check it against the school's real calendar before Gate 2 closes. Format rungs are chosen from each course's own ladder at Gate 2.

Term	Audience	Course	Time class	Cost to scarce resources
1	SLT and head	EDU-SL1	Leadership day	Cover for any teaching members of SLT
1	SLT and policy owner	EDU-SL2	Governance day, or 2 × half-day 3 to 4 weeks apart	Cover: one delegate-day per participant
1 or 2	Governing body	EDU-SL5	60 to 90 minutes inside a scheduled governors' meeting, evening	No cover, no directed time
2	Whole teaching staff	EDU-T1	INSET full day	One INSET day, the only one the programme asks for
2	Whole teaching staff	EDU-T1 follow-up	Twilight, 2 to 6 weeks after the day	Directed time
2	Whole teaching staff	EDU-T4	Rung per its format ladder	Directed time
2	Middle leaders	EDU-MM1	One working day, or 2 × half-day three weeks apart	Cover: one delegate-day, whole or split
2 to 3	Department cohorts named at Gate 2	EDU-T2 and/or EDU-T3	Twilight series per department	Directed time
2 to 3	SLT	EDU-SL4	One-day working session, or 2 × half-day	Cover
2 to 3	Students, entry course per phase, plus EDU-S-M7	Student courses	Normal curriculum time	Timetable displacement, no cover
2 to 3	Parents and carers	EDU-PAR-1 or PAR-2	60 to 75 minute evening	No cover, no directed time
3	Whole teaching staff	EDU-T6	Termly twilight in the published directed-time calendar	Directed time

The arithmetic, stated. One INSET day; the remainder of the staff programme inside directed time and department meetings; governor and parent sessions in the evening at no cost to teaching time; student sessions in curriculum time. Leadership courses are the only cover-required items and they involve a handful of people, not a staff body.

Gate 2 cannot close until the sponsor confirms in writing that this calendar exists: that the INSET day is allocated, the twilight slots are in the published directed-time calendar for the year, and the governor and parent sessions have dates. A cohort plan the school cannot timetable is a Phase 4 failure that was visible at Gate 2, and it is our job to surface it there.

How a gate works, and Gates 1 to 3

We issue the phase deliverables. The school has a review window of five school weekdays and returns one consolidated comment set from the sponsor. One revision pass is included per gate. The sponsor signs the acceptance record against the criteria, and the steering group records the board's continue-or-exit decision.

Gates 2 and 3 are dated to a real governing body or committee meeting; the others are sponsor decisions. **Exiting is a normal outcome, not a failure.** Every deliverable accepted at a completed gate is the school's, without condition, whether or not the programme continues. We do not withhold accepted work.

Gate	Deliverables	Accepted when, in brief	If the board exits here it holds
Gate 1, Discovery accepted	Position Report; Data-Handling Record and DPIA support pack; Constraints and Calendar Map.	Every factual statement names its source; no benchmark or comparison against any other school; survey response rate stated as a number and a percentage; the Data-Handling Record lists every category of information received, from whom, held where and for how long; the IT lead and data-protection contact confirm their sections in writing.	An evidenced, sourced picture of its own position, a processing description its DPO can use, and a calendar map. Usable with any provider, or none. The cheapest way a school can find out where it actually stands, and a defensible place to stop.
Gate 2, Strategy accepted	AI strategy and multi-term roadmap; cost-base and resource sheet; progress-measure set; governance note; cohort plan; board paper.	Every action has an owner by role, a term-and-week window, a prerequisite and its decider; nothing in a blackout week; every priority has an action and every action a priority; directed time totalled per half-term against the stated budget; every figure sourced, dated and attributed, every action with one cost class; no measure attributes attainment to AI; the cohort plan is timetabled and confirmed in writing; where an action could be delivered by us, an alternative route is named alongside it.	The strategy: a costed, sequenced, owned multi-term roadmap with measures and governance, and enough to run the whole programme itself or put it out to another provider. An intended, respectable exit, and we say so at discovery rather than treating it as attrition.
Gate 3, Policy pack accepted	Four policy drafts; risk register; governor briefing pack; professional-review routing record.	Every draft carries the front sheet on page one: prepared for the school's own professional review and its governing body's approval, not legal advice; every regulatory reference names the instrument, its edition and the date checked; the routing record names which professional review each draft should have and records which the school obtained; every risk has an owner and a review date; the briefing pack is dated to a real meeting; no draft is described anywhere as approved, adopted, compliant or Ofsted-ready.	The strategy, plus policy drafts ready to take through its own review and approval, a risk register, and a board that has been properly briefed. A legitimate outcome for a school whose real gap was governance rather than practice.

Gates 4 to 6

Gate	Deliverables	Accepted when, in brief	If the board exits here it holds
Gate 4, Development programme delivered	Delivered cohort programme against the Gate 2 plan; practice maps; evaluation summaries per cohort at Guskey levels 1 to 4; whole-school CPD pathway.	Every session delivered or formally rescheduled with a recorded reason, with attendance stated per cohort; every cycle has had its follow-up touchpoint with gap-task evidence brought back, or the reason recorded with an owner; evaluation summaries name the instrument for each level and refuse level 5 in writing with the reason; the CPD pathway is mapped to the school's own calendar for the following year and states that the school can deliver it with any provider; nothing identifies an individual member of staff by name in any document that goes to leadership.	The strategy, the policy pack, a staff body that has been through a cycle programme with evidence of changed practice, and a CPD pathway it can run itself next year. This is the point at which most of the value has landed.
Gate 5, Embedding accepted	Amended schemes of work in the named departments; the department production workflow; worked exemplars; departmental evaluation.	The amended schemes are in the school's own format and system, not in our template; every amended unit names who will teach it and the term it is first taught; the workflow is written to run without us present and the department head confirms that in writing; exemplars use the department's own content or synthetic material, with no pupil work or data; the evaluation is against the course criteria grids and makes no attainment claim.	Everything above, plus proven worked practice in named departments and a workflow the rest of the school can copy. The school can extend it internally without further commissioning.
Gate 6, Handover accepted	Programme evaluation report; governor report; handover pack; twelve-month continuation plan.	Results at Guskey levels 1 to 4 against the Gate 2 measures, with baseline and current values or an explicit "no baseline"; level 5 refused in writing, with the reason, in both reports; the handover pack names every artefact, where it lives in the school's own systems and the role that owns it, with nothing owned by "the SLT" or by a person who has left; every remaining dependency on us is written down and knowingly accepted, or removed; the continuation plan is dated against the following year's calendar with owners and dates on its first three actions; the governor report contains no claim we cannot evidence.	Completion: the full list on page 2, and a school that runs the programme without us.

The school owns what is made for it

Ownership

Every deliverable listed at the gates is the school's property: Position Report, strategy, roadmap, cost sheet, progress measures, governance note, policy drafts, risk register, governor packs, practice maps, evaluation summaries, CPD pathway, amended schemes of work, production workflow, exemplars, handover pack and continuation plan. The school may amend them, circulate them, share them with its trust, diocese or local authority, put them to its governing body, publish them, and go on using them indefinitely, including if it exits at Gate 2 and takes the strategy to a different provider, and including if it never works with us again. We withhold nothing to secure the next gate and require no attribution. A scheme of work a department amends inside Phase 5 is the school's, including the parts derived from our exemplar. Our pre-existing materials remain ours: course specifications, session plans, facilitator guides, participant packs, instruments, the survey instrument, the facilitation methods, the progress-report format and the gate structure itself. The school receives a perpetual licence to use the copies supplied for its own internal purposes, including running the CPD pathway with its own staff after Gate 6, which is the whole point of Gate 6.

Confidentiality

We will not name the school, quote it or describe it as a client in any material, including a brochure, website, proposal or conversation with another prospect, without written permission. We publish no client case studies, no named references and no delivery statistics of any kind, and nothing in this engagement creates one.

Language discipline

Stated because it binds our own vocabulary throughout delivery, not only the documents. We say **team AI practice map**, not capability audit, because capability has a specific and serious meaning in a school's employment procedures. We say **development conversation**, not performance conversation. We say **prepared for governing-body approval**, never approved, adopted or signed off, because approval authority is the board's. We say **drafts for your professional review**, never compliant, legally sound or Ofsted-ready; Ofsted states that it does not look at AI as a stand-alone part of inspection and does not directly evaluate the use of AI or of any AI tool (Ofsted, *How Ofsted looks at AI during inspection and regulation*, 21 October 2025). We say **evidence of changed practice**, never improved outcomes or raised attainment. We say **what the school holds at this gate**, not what it will have achieved.

Making drift visible within a fortnight

A two-to-three-term programme fails through drift, not through incompetence. The governance below exists to make drift visible within a fortnight of it starting.

Named school sponsor

One person: the head, or a deputy or business leader with the head's written authority. The sponsor accepts deliverables, commits directed time, chairs the school side of the steering group, and is the single route for consolidated comments. Named in the contract before Phase 1 begins. A change of sponsor is a change event: the incoming sponsor is walked through every deliverable issued so far and re-confirms the calendar commitment before the programme continues.

Named EGM engagement lead

One person, accountable for delivery end to end, present at every steering meeting, and named in the contract. The named lead stays with the programme end to end; where a delivery associate changes between phases, the sponsor is told before the session, not after. The named individuals who would deliver the engagement, their teaching and school backgrounds and their role on the programme are supplied at proposal stage, not left to the contract, with the DBS and insurance positions alongside. We publish no client case studies or named references; where a referee arrangement exists it is offered directly with the referring school's permission, and where it does not, we say so.

Steering group and cadence

Sponsor (chair), EGM engagement lead, the school's data-protection contact, the IT lead, and one classroom-facing staff representative. The last is not decoration: a programme about staff practice with no staff voice in its governance is the failure mode both recognised classroom unions have published positions about. Fortnightly during delivery phases, monthly otherwise, 45 minutes, standing agenda, remote by default. Cancelled meetings are rescheduled within five working days, not skipped; two skipped meetings is the point at which a programme has quietly stopped.

The progress report

Issued two working days before each steering meeting. One page, the same shape every time: gate status with an on-track, at-risk or slipped call in one sentence; deliverables issued since the last report; every deliverable awaiting acceptance and its age in working days; school-side items overdue, by owner and days, unsoftened, because school-side dependencies are the most common cause of slip and the sponsor cannot fix what they cannot see; risks with owner and mitigation; the next four weeks by school week number; and the decisions required at this meeting, stated as questions with the options.

The termly governor report

One page per term to the governing body, in the format agreed at Gate 2: gates completed, what the school now holds, the calendar commitment met or missed, progress measures with values, spend against the Gate 2 cost base, and the decision required at the next gate. It carries no claim we cannot evidence.

Escalation

Sponsor, then head, then chair of governors or trust executive. We escalate a school-side dependency that has been overdue beyond an agreed threshold and has appeared on two consecutive progress reports; the school escalates a failure on our side the same way. The route is agreed at contract so that using it is procedure rather than confrontation.

No pupil data, at any phase

Data processing and the DPIA

Phase 1 is where the data risk in this engagement sits; later phases work on the school's curriculum documents, its policies and its own staff's practice. **We take no pupil personal data at any point in this engagement, and the programme is designed so that none is needed.** At discovery we receive school documents, a systems and device inventory, an IT position sheet, pseudonymous staff survey responses carrying role band and phase only, and notes from interviews with post-holders acting in their professional capacity, attributed by role and not by name. We do not receive, at any phase, pupil records, pupil work, attendance, assessment or behaviour data, SEND records, safeguarding logs, staff personal files, class lists or any export from an MIS. We do not require accounts on the school's MIS, safeguarding system or network; where a demonstration needs a system, the school's own staff drive it. The school distributes the survey through its own channels. Where information supplied to us contains personal data we act as processor on the school's written instructions under a written data-processing agreement; sub-processors are named at contract and the school approves any change. No school document, interview note or survey response is put into a public generative AI tool by us.

Whether a data protection impact assessment is required, for the discovery processing and separately for anything the roadmap later proposes, is the school's decision, taken by its DPO. It is not ours, and it is not the sponsor's to take on the DPO's behalf. As a Gate 1 deliverable we supply a plain-language description of the processing, the data flows, the purposes, the categories of data and data subjects, the retention position, the sub-processor list and the measures in place, and we attend the DPO's review. We do not complete the school's DPIA, sign it, approve it, or make the necessity and proportionality judgements it requires. Where the roadmap or the policy pack proposes anything that would process pupil or staff personal data, that is the school's processing and the school's DPIA; our role is to describe it accurately and route it to the DPO with a decision date against a real meeting. 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.

What we are not

Drafts for your review, and the claim we refuse to make

Our policy outputs are drafts prepared for the school's own professional review and for its governing body's approval. They are not legal advice. We are not a law firm, not a data-protection advisory practice, and not the school's DPO. Nothing in Phase 3 is a legal opinion. Before adoption, every draft should be reviewed by whoever the school already relies on for that subject; this is written on the front sheet of every draft, stated at the start of Phase 3, and the Gate 3 criteria require the school to record which reviews it obtained. Approval authority sits with the governing body, proprietor or trust board, not with us and not with the SLT.

Draft	Review it should have before adoption
Staff AI use policy	The school's HR or employment adviser, or the trust central team, for anything touching staff conduct, monitoring and appraisal
Pupil use and assessment integrity	The exams officer and the awarding-body guidance in force at the time; the SLT member responsible for assessment
Data-protection annex	The school's DPO
Procurement and adoption checklist	The business manager and, where thresholds apply, the trust or local authority procurement route
All four	The safeguarding governor and the DSL for the safeguarding content; the governing body, proprietor or trust board for approval

Regulatory currency. Drafts state the instruments and editions they were written against and the date the position was checked. Regulation and statutory guidance change; the drafts say when they were current and we do not warrant them beyond that date. A later re-check is a new scope, and EDU-T6's termly currency session is the cheaper route for the practice-level material.

What we do not claim about outcomes. We do not claim, and this engagement does not evidence, any effect on pupil attainment. The evaluation measures Guskey levels 1 to 4, reaction, learning, organisational support and use of new practice, and refuses level 5 in writing, with the reason, in the evaluation report and the governor report. The reason is not modesty. No published evidence supports attributing pupil attainment to a professional development programme of this kind, and the nearest relevant UK trial (EEF, *ChatGPT in Lesson Preparation: A Teacher Choices Trial*, 2024) measured lesson-planning time and resource quality and did not measure pupil outcomes at all. A provider claiming an attainment effect is selling something it cannot show you.

What we are not responsible for. Decisions the school takes; tools the school buys; the school's own processing of personal data; its employment relations and consultation; its regulatory compliance; and anything the school does with a draft it did not put through the reviews above. The insurance position and any limit on liability are stated in the proposal.

Dates, exits and scope

Dates, pauses and exits

Terms are written in school weekdays and keyed to the school's own dates. At contract, term dates, INSET days and their existing commitments, examination windows, reporting weeks, parents' evenings and board meeting dates are recorded as blackout weeks we do not schedule into.

Emergency closure is postponement with no notice consequence. Where a phase cannot run in its term it pauses to the next term rather than compressing; the gate date moves, the programme may extend from two terms to three, and after a pause of more than a full term the discovery data is refreshed before the affected phase runs. The board may exit at any gate: everything accepted at completed gates is the school's without condition, and work in progress is issued as a draft and is also the school's. Session notice periods, what is payable on exit at each gate, and the remedy if we fail to deliver are stated in the proposal, gate by gate, so that a board deciding at Gate 2 knows what continuing costs before it decides.

Scope

Included: the discovery conversation and written proposal; all six phases and their deliverables; the named cohort programme agreed at Gate 2, delivered as cycles including follow-up touchpoints; one revision pass per gate against one consolidated comment set; the steering group, progress reports and termly governor reports; attendance at the DPO's review of the discovery processing; the handover working session and the twelve-month continuation plan.

Not included; separately scoped: the local AI infrastructure workstream and any build; additional departments in Phase 5 beyond those named at Gate 2; additional cohorts or repeat sessions; a second revision pass at any gate, or reopening a gate after acceptance; any re-run of discovery data caused by a pause beyond one term; procurement, licence purchasing or contract negotiation; completing the school's DPIA or acting as DPO; recruitment, restructuring or anything touching an individual's appraisal; travel and subsistence, treated per the proposal. What moves the scope: school size and phase spread; two-term or three-term shape; the number of departments in Phase 5; whether the infrastructure workstream runs; and whether Building a School AI Roadmap has already been completed.

How it starts

Discovery

Every consulting engagement begins with a discovery conversation of 45 to 90 minutes, often two for a programme of this length. It covers what has prompted the question now; whether the decision to proceed has actually been taken, or whether the school is still deciding, in which case the honest recommendation is EDU-SL1 or Building a School AI Roadmap and we make it; who the sponsor would be and whether they have the authority and the hours; the calendar in detail, including INSET commitments, directed-time budget, board meeting dates and blackout weeks; the data-protection position and who the DPO is; whether recognised unions are in place and how the school consults; two-term or three-term shape; whether the infrastructure workstream is live; and the basis for the proposal. A written proposal follows, scoped gate by gate. No prices appear in this outline.

We will decline the engagement where no sponsor with authority can be named; where the calendar on page 7 cannot be supplied; where the school wants a strategy rather than delivery; where the buyer is a group rather than a school; or where the school is asking for assurance that this will raise attainment, which we will not give.

The package inside the engagement

The named course composition across two to three terms is the Full School AI Transformation package; this engagement is what wraps it: the discovery, the strategy and roadmap, the policy drafting, the governance, the gates and their criteria, the embedding, the evaluation and the handover. A school can buy the package without the engagement and own the sequencing, policy work, governance and evaluation itself, which is a real and reasonable purchase for a school with the leadership capacity to run it, and we state the difference at discovery rather than bundling by default. A school cannot buy the engagement without a staff development component: a strategy delivered into a staff body that has had no development is a document, and Gate 4 exists to prevent exactly that.

Talk to us

e customerservice@egmfamilyholdings.com

w egmfamilyholdings.com



EGM (FAMILY) HOLDINGS LTD

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.

EGM Education and Training is a division of EGM Family Holdings Ltd, registered in England and Wales, company number 17456589. Registered office 71-75 Shelton Street, Covent Garden, London WC2H 9JQ. Engagement outline, September 2026. This outline describes the engagement; the written proposal and the acceptance record issued after discovery are the documents that bind. No prices appear in this outline.