



## GUIDE AND EDITABLE TRACKER

# AI Workload Toolkit

Identify worthwhile workflows, run a focused pilot and measure the whole task rather than counting generation time alone.

|                      |                                                                             |
|----------------------|-----------------------------------------------------------------------------|
| <b>Designed for</b>  | School leaders, MAT leaders, wellbeing leads, digital leads and pilot teams |
| <b>Last reviewed</b> | 3 August 2026                                                               |

**Important: adapt this resource for your setting. It is not legal advice and does not replace advice from your DPO, DSL, IT lead, governing body or relevant professional advisers.**

## Start with the workload problem

The workbook supplied with this guide helps teams compare the time spent on a task before and after AI support. It is designed for role or team-level information; do not enter pupil information, sensitive staff information or unnecessary personal data.

- Choose recurring tasks with a clear finished form.
- Include checking, correction, formatting and approval time.
- Separate time saved from quality, risk and staff experience.
- Stop or redesign a workflow that creates more correction or oversight than it removes.

## A four-step pilot

1. Audit: record the current task, frequency, time and main source of friction.
2. Select: choose a small number of low- or medium-risk workflows with realistic time-saving potential.
3. Test: compare the complete task with and without AI support over several real uses.
4. Review: consider time, quality, accessibility, privacy, staff confidence and whether the workflow should stop, change or scale.

## Suitability questions

| Question                            | Stronger candidate                                       | Pause or escalate                                                    |
|-------------------------------------|----------------------------------------------------------|----------------------------------------------------------------------|
| <b>Is the task repetitive?</b>      | Occurs regularly and follows a recognisable structure.   | Rare, unusual or heavily dependent on tacit context.                 |
| <b>Can a person review it?</b>      | A suitably qualified person can check the whole result.  | Errors may be hidden or difficult to verify.                         |
| <b>What happens if it is wrong?</b> | Low consequence and easy to correct before use.          | Safeguarding, legal, employment, SEND or other consequential impact. |
| <b>What data is needed?</b>         | No personal data, or approved minimum information only.  | Identifiable or special-category data in an unapproved service.      |
| <b>Does quality remain visible?</b> | The team can define and assess a useful finished result. | Success is measured only by speed or volume.                         |

## Evidence worth collecting

- Current minutes and AI-assisted minutes for the complete workflow.
- Correction and approval time.
- A simple quality rating using agreed criteria.
- Whether the staff member would use the workflow again.
- Privacy, safeguarding, accessibility or factual concerns.
- A short note explaining what made the workflow succeed or fail.

## Review questions for leaders

- ☐ Did the workflow save time after checking and correction?
- ☐ Was the final quality at least as strong as the previous approach?
- ☐ Did staff use approved tools and the minimum necessary information?
- ☐ Were any groups disadvantaged or additional accessibility adjustments needed?
- ☐ Did the pilot reduce workload, or merely move it to another colleague?
- ☐ Should the workflow stop, be redesigned, remain optional or become a supported routine?

## Suggested pilot rhythm

| Stage            | Suggested activity                                            | Evidence                                        |
|------------------|---------------------------------------------------------------|-------------------------------------------------|
| <b>Week 0</b>    | Agree purpose, safeguards and baseline workflows.             | Completed audit and approved pilot list.        |
| <b>Weeks 1-2</b> | Test with real recurring tasks and record the whole workflow. | Time, correction, quality and staff notes.      |
| <b>Week 3</b>    | Share examples and adjust weak instructions or review steps.  | Revised workflow and support needs.             |
| <b>Week 4</b>    | Decide what to stop, continue or scale.                       | Short leadership decision and next review date. |

## Sources and further guidance

**DfE - Workload reduction toolkit:** <https://improve-workload-and-wellbeing-for-school-staff.education.gov.uk/workload-reduction-toolkit/>

**DfE - Generative artificial intelligence in education:** <https://www.gov.uk/government/publications/generative-artificial-intelligence-in-education>

**DfE - Generative AI and data protection in schools:**

<https://www.gov.uk/guidance/data-protection-in-schools/generative-artificial-intelligence-ai-and-data-protection-in-schools>