

USING AI IN YOUR GOVERNANCE ROLE GUIDANCE & TOP TIPS

This guidance note is designed to offer guidance and top tips to governance professionals considering using AI in their role. It will cover: the privacy and data protection considerations of AI, possible uses in the governance role, and how to make the most of AI platforms.

Look out for the lightbulb!



If you see this icon it means you don't need to start from scratch: an example resource is provided in our community library for you to use.

You can use this guidance note in conjunction with our session recordings relating to AI in governance.

If in doubt, always refer to official guidance including [DfE, Generative artificial intelligence \(AI in education\)](#)

The information included in this document is not intended as legal advice. It has been produced by Trust Governance Professionals for use by members of Trust Governance Insight, and is correct at the time of writing, September 2025. If in doubt, seek advice from your legal or audit partners.



Members of Trust Governance Insight can access the recordings of our Lightning Session – Using AI in Your Role, our AI Promptation and our Compliance session on The Governance of AI via our community portal

Using AI: Information Governance

Ensure you are **considering, communicating** and **managing** the risks associated with the use of AI.

Consider

- Ensure you have carried out a Data Protection Impact Assessment before using AI in your role.
- Carry out a Risk Assessment for the use of AI.
- Set clear principles for using AI both in your role and in your wider organisation.
- You may wish to set up an AI Working Group to plan how to use AI within your organisation.
- Consider involving early adopters to give feedback on the risks and benefits of AI.
- Seek legal advice early on any matters you think may be a risk to data protection or information security.
- And finally, consider the often-overlooked environmental impacts of using AI and its impact on your organisation's environmental sustainability principles.

What is a Data Protection Impact Assessment?

“A DPIA is a process designed to help you systematically analyse, identify and minimise the data protection risks of a project or plan. It is a key part of your accountability obligations under the UK GDPR, and when done properly helps you assess and demonstrate how you comply with all of your data protection obligations.

It does not have to eradicate all risk, but should help you minimise and determine whether or not the level of risk is acceptable in the circumstances, taking into account the benefits of what you want to achieve.”

Information Commissioner's Office



The ICO publishes a [suggested DPIA template](#) which you may wish to use. You are also welcome to use your own format – there is no one right way to carry out a DPIA.



You can watch a free webinar giving an introduction to the **Governance of AI** from Browne Jacobson. The webinar is [available here](#). You need to register to watch.

Communicate

- Draw up an AI policy or usage protocol so that everyone in your organisation is aware of how to use AI in accordance with your principles.
- Survey staff to gauge their level of knowledge and familiarity with AI, and their comfort levels with using it in their roles. Do you need to organise training?
- Be transparent with your use of AI. Communicate to others when you will be using it. Especially with video transcripts, it is essential that you gain permission before recording.

Stop and ask yourself



- Have I gained explicit permission from all users before using an AI tool to record a meeting? What will I do if permission is withheld?
- Have I considered the implications for confidential information which may be discussed during the meeting?
- Have I considered the risk of data being accessed by a third party, especially using generative AI?
- Have I considered the implications of having both a recording **and** a set of minutes in terms of Freedom of Information requests?

Manage

- Consider an AI monitoring checklist and a way to report any incidents. Review these on a regular basis.
- Ensure everyone using AI has access to appropriate training on an ongoing basis.
- Continue to review the use of AI to ensure it is always appropriate.
- Ensure you are hearing from users about their experiences.



TGI members have shared **exemplar AI policies** in our TGP Resource Library.

AI and Privacy

Different AI platforms process and use information that you share with it very differently. **Make sure you check how data you input will be used** and always check the platform you are going to use before implementing it.

Where could AI be useful?

It's not just about recording the minutes! There are other ways to incorporate AI into your role which might help relieve workload.

Minutes

- It is possible to record meetings and produce a transcript, which can then be turned into meeting minutes – however there are other ways to use AI when producing meeting records, without the privacy concerns involved in recording potentially confidential or personal discussions.
- The other option is to make notes of the meeting, and use AI to turn these into a set of minutes. Tips for how to do this are in the next section.

Policies

- AI can be used to draft policies, making use of current statutory or non-statutory guidance, or to check that policies are compliant with government guidance.
- **Make sure your AI is using the most recent version of the statutory or non-statutory guidance!**
- AI programmes are increasingly able to check websites for policy compliance—[Robin from The Key](#) is one such model.

Report writing

- You can feed AI key points to cover, and ask it to produce a briefing or a board report. This can be used for local governance reporting to board, overall governance reports, briefing papers or newsletters. Give your AI some bullet points and a suggested style of writing and see what it comes up with.

Letter drafting

- Writing letters functions similarly to writing reports – feed your AI platform your main points and a suggested style and then check the letter it produces to ensure you are happy with it.

Analysis

- AI can help to analyse both written and numerical data (for example stakeholder survey or school data), identifying key trends or common themes and providing a basis for discussion. This could be used for example in trustee or local governance meetings or performance reviews.

‘Top Tips’ for making the most of AI

Always remember: **The quality of the prompt determines the quality of the answer.**

The most important thing to remember – CHECK, CHECK, CHECK	Never send something out without checking. AI is not infallible – it can make some truly spectacular factual errors! So ensure you have read all the way through any document AI has produced for you, before sending it to anyone else! Remember, artificial intelligence does not replace human intelligence and it requires knowledgeable oversight.
Think about your prompts	The more specific you are, the more accurate the AI response will be. Include key words you would like the AI to use (in a set of minutes, this might be verbs such as ‘discussed’, ‘agreed’ and ‘questioned’). Specify a list of key topics you would like your document to contain.
Specify where you are	Make sure that you make it clear that you are in the UK and working in the academy sector. AI might otherwise give you guidance from other countries, from maintained schools, or from other areas of governance.
Link to relevant documents	If you want to use a particular piece of UK legislation or guidance, link directly to that guidance in your prompt if possible. That way you can ensure that AI will use the correct one, and not an outdated version. If you cannot link, at least mention the date in your prompt, e.g. ‘Use the DfE’s statutory exclusions guidance from 2024.’
Upload a style template	Train your AI model on your style – in most AI programmes you can upload an exemplar document and ask it to write in a similar style. This could be a style guide, or a previous board report or letter. You could link to your organisation’s website to demonstrate the typical style used in its communications.
Refine through feedback	You can continue to comment on each response, asking it to be more specific, more professional, to change the word count, or to mention something extra. Refine until you are happy with the output. There will come a point where it is easier to download where you are up to, and make the final changes yourself!

Trust Governance Professionals

Trust Governance Professionals (TGP) was set up by academy governance professionals for academy governance professionals. We offer sector expert practitioner training, networking and continual development opportunities for those working at both trust and school levels in academy trust governance. For details of the programmes we offer, including induction courses, our flagship programme Trust Governance Insight, and bespoke mentoring options, visit our website:

www.tgpltd.co.uk