# AI Roadmap Facilitation Guide

Overview

This guide is intended for board members and superintendents seeking to develop or refine their approach to incorporating artificial intelligence (AI) technology into both the academic and administrative operations of their organizations. The activities and discussions in this guide will help governing teams and stakeholders craft a resolution outlining the LEA's approach to the use of AI in the district and develop a roadmap towards implementing this approach. Importantly, this activity is designed for resiliency and should be revisited periodically by the governing team as the underlying technology, opportunities, strategies and local preferences evolve.

The AI Roadmap Facilitation Guide provides a four-part activity for governing teams and other stakeholders such as students, families, staff and community members. It should be conducted as part of a comprehensive workshop, either at a full-day retreat or sequentially at a series of board meetings (consistent with the Brown Act). Participants will reflect on the organization's mission and vision as they distill their collective values/beliefs regarding AI into a resolution, then use guiding questions to evaluate a series of real-world scenarios and convert that evaluation into a clear roadmap that provides explicit direction and guidance for where AI should be permitted, prohibited and/or further analyzed. The diagram below provides a visual representation of this process.
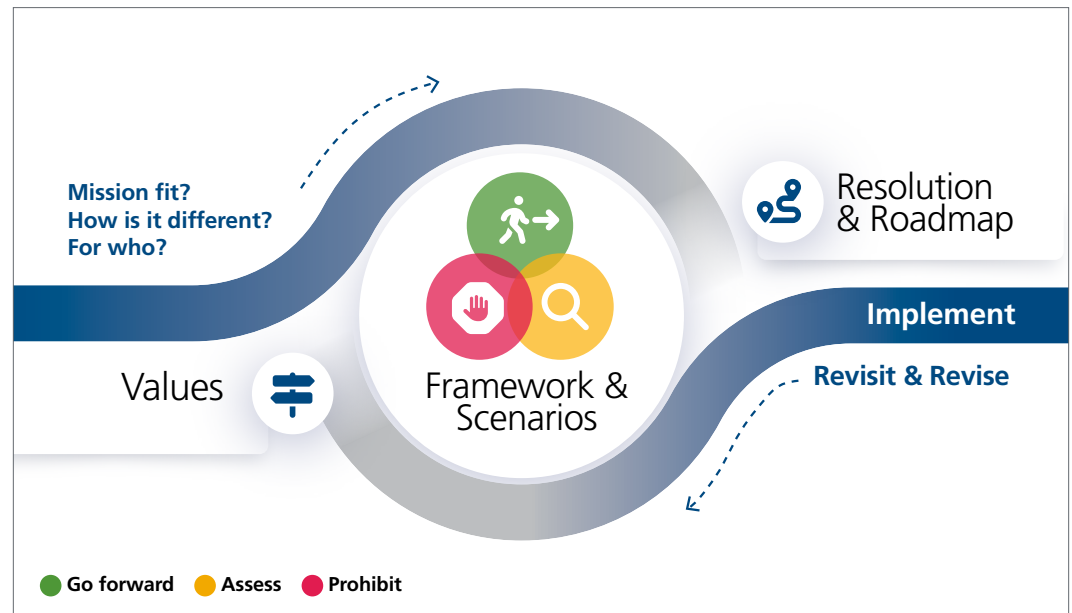
Recommended Prerequisites

1. Complete the AI Readiness Checklist from the Consortium for School Networking (CoSN), found here

2. Complete the Generative AI Maturity Tool from CoSN, the Council of Great City Schools, and Amazon Web Services, found here

Part 1 — Values Discussion

GOAL: *Develop the values that will form the baseline of an AI Resolution*

Answer the questions in the table below based on your mission and vision statements.

Question	Response (Values)
How do we believe AI can further our mission?	
Where do we want AI to be used by students, staff?	
Where and how is AI similar to and different from the current technology (e.g. Google search, Grammarly, spell/grammar check) used by students and staff?	

Part 2 — Scenario Review

> **GOAL:** *Discuss various scenarios related to AI, generating a list indicating where the use of AI is permitted, needs further evaluation or should be prohibited.*

Complete the following steps and refer back to the values documented in Part 1.

STEP 1 Review the key terms and definitions on the next page and note the criteria for each color ranking to ensure all participants are aligned.

STEP 2 Review each row on the Scenario Worksheet that follows as if it was already happening in your organization and discuss each consideration highlighted in blue for that scenario. Use the following questions as a guide:

    a *Are we generally okay with the use of AI in this scenario, given our values?*

- ▶ Yes — Proceed to next question
- ▶ It depends — Proceed to next question
- ▶ No — Assign **red** or **"R"** to this scenario

    b *Do we have a clear policy, contract language, and/or data sharing agreements in place that addresses each area of consideration?*

- ▶ Yes — Assign **green** or **"G"** to the relevant column for this scenario
- ▶ Somewhat or Unclear — Assign **yellow** or **"Y"** to the relevant column for this scenario
- ▶ No — Assign **red** or **"R"** to the relevant column for this scenario

  c **Are all the relevant columns coded for this scenario?**

- ▶ Yes — Assign **green** to the final column
- ▶ No, and none are coded **red** — Assign **yellow** to the final column
- ▶ No, and at least one column is coded **red** — Assign **red** to the final column

> ↪ **STEP 2 ALTERNATIVE***: Review the scenarios and respond to those that are the most relevant.*

STEP 3 Add and evaluate any additional scenarios that are already present in your organization or likely to be. Include the following steps:

    a *Gather scenarios from participants and add to the empty rows at the bottom of the scenario sheet*

- ▶ Note whether any aspect of the new scenario is already addressed by one of the scenarios provided, and make note of the areas of concern highlighted and/or any discussion or color assignments

    b *Determine whether any of the areas of consideration apply for each new scenario and mark the appropriate column*

    c *Repeat the exercise and questions in STEP 2 to assign colors to the relevant columns for each new scenario*

> **Documentation tip**
>
> Write down the specific policies and regulations in your district or county office that are relevant for each column as you work through the scenario worksheet. Many scenarios will come back to the same policies and regulations such as Academic Honesty, Homework and Makeup Work, and Use of Technology. This will provide a helpful policy reference in the future as new scenarios emerge.

Key Terms — Definitions

Green or "G"
Move forward with use; there is alignment with the mission and vision; the relevant policies, contract language and/or data sharing agreements are in place.

Yellow or "Y"
Pause use and prioritize for deeper discussions; potential alignment with mission and vision but needs further discussion; current policies, contract language and/or data sharing agreements need further analysis.

Red or "R"
Do not move forward and/or actively prohibit use; no clear alignment with mission and vision; lack of sufficient policies, contract language and/or data sharing agreements.

Cheating / Plagiarism
Whether a student is misrepresenting work performed or the final product as their own based on expectations. Note: it is not misrepresenting if the assignment permits the use of AI or the student discloses the use of AI.

Privacy / Confidentiality
Whether use of or interaction with AI violates a student's or employee's right to privacy and/or confidentiality.

Due Process
Whether decisions are made according to a fair process consistent with collective bargaining agreements and legal requirements.

Access / Equity
Whether there is equitable access to or treatment by AI, either by those using it or those subject to decisions made by its use.

Use of Output
Whether use of AI prevents/inhibits or supports/enables a student achieving the district's standards for academic achievement or an employee performing their responsibilities.

Labor / Working Conditions
Whether use of AI impacts working conditions subject to collective bargaining agreements or required professional development.

Accountability / Transparency
Whether the user, subject or other stakeholders are aware that AI was used to generate the information or decision, and whether an individual/entity is identified as the accountable authority for ensuring proper use.

Security
Whether use is authorized and meets security requirements, including a process for determining if authorization is necessary and by whom.

Scenarios Worksheet

	Discuss and rate checked boxes:	Cheating/Plagiarism	Privacy/Confidentiality	Due Process	Access/Equity	Use of Output	Labor/Working Conditions	Accountability/Transparency	Security	G, R, or Y
1	Teacher assigns a research paper to her 8th grade social studies class: Write a 3-page essay on the tensions inherent in the concept of individual rights as stated in the Declaration of Independence.									
1A	Student asks ChatGPT to "Summarize in about 500 words how historians have described the concept of 'individual rights' in the Declaration" and submits it as their own.	✓						✓		
1B	Student inputs draft of essay and asks ChatGPT for "suggestions for improvement." Student uses suggestions to improve essay and submits it.	✓						✓		
1C	Student develops main points provides and asks ChatGPT to write an essay with those points. Student then substantially edits essay and submits it.	✓						✓		
1D	Teacher pastes all papers into ChatGPT and asks: "Identify the three major strengths and weakness of these short research papers written by 4th graders."		✓			✓	✓	✓		
1E	Teacher modifies the assignment to require that students use ChatGPT-4 to complete it and provide a copy of their prompt and the responses received.				✓			✓		
2	Social Studies Department Chair pastes all student papers from all teachers into ChatGPT and asks "Identify the three most common shortcomings of these short research papers written by my teaching staff and offer suggestions for professional development within my department." Based on the results, the Chair requires all teachers in the department to take a remedial professional development course.					✓	✓			
3	Social Studies Department Chair permits the use of AI chatbots for evaluating student essays for one teacher who request it as a way to save time. This teacher is the most "tech-savvy" one in the department. Other teachers are not informed of the opportunity to use AI and continue with traditional, time-intensive evaluation methods.				✓		✓			

Scenarios Worksheet

	Discuss and rate checked boxes:	Cheating/ Plagiarism	Privacy/ Confidentiality	Due Process	Access/Equity	Use of Output	Labor/Working Conditions	Accountability/ Transparency	Security	G, R, or Y ↓
4	School Principal uses Microsoft Word's Copilot AI feature to generate the written portion of an evaluation for a social studies teacher using their student essays along with the typed notes from their own in-classroom observations and from those submitted to the Principal by the Social Studies Department Chair.		✔			✔	✔			
5	Adobe Acrobat turns on an AI feature by default across all our LEA's user accounts without prior announcement, instead triggering a pop-up notification that appears for a teacher who is reviewing student papers. The pop-up offers to analyze the document and share insights.				✔				✔	
6	District signs new agreement with its current Student Information System (SIS) vendor to use a new AI module that allows administrators to evaluate student records and portfolios to make recommendations for academic interventions. Administrators also have access to a free trial of a feature from different district-approved intervention system that can perform the same functions but also includes a unique home language translation feature, which is strongly favored by administrators over the approved system; however, the data need to be imported or uploaded manually and the new feature has not yet been officially approved.				✔				✔	
7	Parent/guardian learns from their student that teachers have access to AI to evaluate papers and that students are not prohibited from using ChatGPT. Student does not have access to the paid version and shares that their peers are all using the paid version and is distraught that their grade won't be as high.				✔			✔		
8	Parent/guardian learns, after the fact, that a teacher has assigned an essay and requires that the student use an AI chatbot to complete the assignment.				✔			✔		

Scenarios Worksheet

G=Green Y=Yellow R=Red

#	Discuss and rate checked boxes:	Cheating/Plagiarism	Privacy/Confidentiality	Due Process	Access/Equity	Use of Output	Labor/Working Conditions	Accountability/Transparency	Security	G, R, or Y
9	Teacher who expects use of a paid version of AI that a student can't afford.				✓		✓	✓		
10	Principal says at the beginning of the year that they're going to make AI more available; one teacher says yes, the other says no and files a complaint with their union				✓		✓			
11	Evaluations of teachers on use of AI in terms of efficiency/effectiveness				✓		✓			
12	Putting student information and work into systems; free versus district-sponsored systems		✓				✓	✓	✓	
13	Turning on new AI features with an existing vendor and determining whether to use it		✓						✓	
14	Using AI to write IEPs and sharing sensitive student information		✓			✓	✓	✓	✓	
15	Using AI to write staff/employee evaluations		✓	✓	✓	✓	✓	✓	✓	
16	District deploys a custom AI chatbot that makes all user conversations available to staff and administrators. One teacher notices another teacher's student creating content depicting violence toward another student and notifies campus police.		✓	✓		✓	✓	✓	✓	
17	Replacing or augmenting tutors with AI				✓	✓		✓		

Scenarios Worksheet

G=Green   Y=Yellow   R=Red

	Discuss and rate checked boxes:	Cheating/ Plagiarism	Privacy/ Confidentiality	Due Process	Access/Equity	Use of Output	Labor/Working Conditions	Accountability/ Transparency	Security	G, R, or Y
18	Encouraging interactions with AI to practice skills such as debate, foreign languages, etc.				✔					
19	Administrator recommends use of AI and teacher/staff refuse			✔	✔		✔	✔		
20	Using AI to generate recommendations for intervention or services like IEPs		✔			✔		✔	✔	
21	Department Chair recommends use of AI in the classroom, but teacher refuses to use AI			✔			✔			

Add custom scenarios below

22										
23										

Scenarios Worksheet

G=Green   Y=Yellow   R=Red

Discuss and rate checked boxes:	Cheating/Plagiarism	Privacy/Confidentiality	Due Process	Access/Equity	Use of Output	Labor/Working Conditions	Accountability/Transparency	Security	G, R, or Y ↓
Add custom scenarios below									
24									
25									
26									
27									
28									
29									
30									

Part 3 — Values Reassessment

> 🎯 **GOAL:** *Revise your values statements*

Based on the scenario exercise in Part 2, how well did your responses reflect your values from Part 1? Document any revisions to your values in the table below.

Question	Revised Response (Values)
How do we believe AI can further our mission?	
Where do we want AI to be used by students, staff?	
Where and how is AI similar to and different from the current technology or resources used by students and staff?	

Part 4 — Resolution* and Roadmap

> 🎯 **GOAL:** *Develop an **AI Resolution** based on the values statements and an **AI Roadmap***
> *Resolutions are not required; they can be helpful tools to support existing policies when there are gaps or emerging issues.*

Developing an AI Resolution

Using one of the sample AI Resolutions from CSBA's AI Toolkit or your own template, draft a board resolution on AI adoption that reflects the values distilled from Part 1 and Part 3. It is recommended that resolutions address the following core concepts:

▶ How the use of AI furthers your mission and vision

▶ How AI should be used by students and staff to advance student outcomes

▶ How the resolution shall be used to guide future policy decisions and regulations in response to new scenarios

▶ The intent that the resolution be revised and updated as necessary to adapt to the evolution of AI technology, uses and risks

> ⮕ **OPTIONAL REFERENCE**: *Include a reference to the AI Roadmap (created in the next section) for approved and/or prohibited uses.*

Developing an AI Roadmap

Using your completed Scenario Worksheet, create an AI Roadmap reference document that clarifies scenarios where your organization approves and prohibits the use of AI. It is recommended that this document include the following components:

▶ Clearly written use cases or scenarios that describe approved AI use by students, staff, and administrators – feel free to use the Scenario Worksheet language

▶ Reference to applicable policies and regulations for each scenario

▶ Version history that indicates when the document was last updated; it is highly recommended that these documents be updated as policy decisions are made

> ☑ **EXTRA CREDIT:** *Add both your AI Resolution and AI Roadmap as evidence on the Generative AI Maturity Tool if you used this tool as a prerequisite.*