# **SAFER Framework: Strategic Foundations Card Deck**

## **Introduction and User Guide**

## **Welcome to SAFER AI Implementation Planning**

**The Strategic Foundations Card Deck provides educational leaders with a systematic approach to making informed decisions about artificial intelligence implementation in their institutions. These five cards guide you through the essential strategic considerations that must be addressed before any AI tools are adopted or policies created.**

## **What This Tool Is**

### **Strategic Planning Framework**

This card deck translates complex change management principles into practical, actionable conversations for educational leadership teams. Each card represents a critical strategic decision point that successful AI implementations require.

### **Evidence-Based Guidance**

The framework draws from established change management methodologies and aligns with current UK Department for Education guidance on AI in education, UNESCO's AI competency frameworks, and proven practices from early adopters in the education sector.

### **Flexible Implementation Tool**

Unlike rigid consultation processes, these cards adapt to your institution's size, complexity, and readiness level. You control the depth of engagement and can revisit cards as your understanding develops.

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## **Where This Framework Comes From**

### **Change Management Foundation**

The SAFER Framework builds on established organizational change principles, recognizing that successful technology adoption requires systematic attention to strategy, organizational readiness, governance foundations, implementation planning, and ongoing reflection before and during implementation.

### **UNESCO AI Competency Framework**

Aligned with UNESCO's principle that AI implementation should be "inclusive and universally applicable across diverse educational contexts," while maintaining focus on human agency and educational values.

### **UK Department for Education Guidance**

**Incorporates requirements from:**

* *Generative Artificial Intelligence (AI) in Education* policy guidance
* *Keeping Children Safe in Education* statutory requirements
* Digital leadership and governance standards
* Data protection and safeguarding obligations

### **Early Adopter Learning**

Informed by insights from educational institutions who have successfully navigated AI implementation, identifying common pitfalls and critical success factors.

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## **The SAFER Framework Structure**

**The SAFER Framework provides a systematic five-phase approach to AI implementation in education:**

### **S - Strategy (Card 1)**

**Strategic Vision and Educational Purpose  
 Establishing clear vision and alignment with educational mission before any implementation decisions.**

### **A - Audit (Card 2)**

**Organisational Readiness and Culture  
 Honest assessment of institutional capacity, culture, and readiness for digital transformation.**

### **F - Foundations (Cards 3-5)**

**Governance, Resources, and Stakeholder Engagement  
 Building the essential infrastructure for safe and sustainable AI implementation:**

* **Card 3: Governance and Risk Management**
* **Card 4: Resource Allocation and Sustainability**
* **Card 5: Stakeholder Engagement and Communication**

### **E - Experiment (Cards 6-8)\***

**Implementation and Innovation  
Systematic piloting and scaling of AI tools with proper safeguards and learning processes.**

### **R - Reflect (Cards 9-10)\***

**Impact Measurement and Future Evolution  
Ongoing evaluation, accountability, and adaptive planning for continuous improvement.**

***Cards 6-10 available in the complete Implementation Essentials deck***

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## **How to Use This Tool**

### **Flexible Engagement Levels**

**The Strategic Foundations cards are designed to work at three different levels of depth:**

#### **Essential Level (1-2 hours per card)**

* **Focus on the core question and select 1-2 most relevant activities**
* **Complete key sections of the reflection tool**
* **Suitable for smaller schools with limited planning time**
* **Provides basic strategic framework for decision-making**

#### **Comprehensive Level (2-4 hours per card)**

* **Complete 3-4 activities per card**
* **Full reflection tool completion with detailed documentation**
* **Suitable for larger institutions or those with complex governance**
* **Creates thorough strategic planning documentation**

#### **Intensive Level (Half-day workshops per card)**

* **All activities completed with extended discussion**
* **Additional stakeholder consultation between cards**
* **External facilitator support recommended**
* **Suitable for multi-academy trusts or institutions requiring extensive consultation**

### **Choosing Your Approach**

**Consider Your Context:**

* **Small primary school: Essential level may be sufficient**
* **Secondary school or academy: Comprehensive level recommended**
* **Multi-academy trust or FE college: Intensive level appropriate**

**Consider Your Timeline:**

* **Urgent decision needed: Essential level with follow-up review**
* **Strategic planning cycle: Comprehensive level integrated into annual planning**
* **Major transformation: Intensive level with full stakeholder engagement**

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### **Adaptation Guidance**

**You Don't Need Everything:**

* **Select activities that resonate with your institution's culture**
* **Combine activities from different cards if that better suits your process**
* **Use the reflection tools as templates - adapt the format to your needs**

**Build on What You Have:**

* **If you already have strong governance, spend less time on Card 3**
* **If budget is tight, focus more deeply on Card 4**
* **If stakeholder relations are strong, streamline Card 5**

**Iterate and Improve:**

* **First pass can be lighter, with deeper engagement on subsequent reviews**
* **Use the tools annually as part of strategic planning review**
* **Adapt based on what works for your leadership team**

## **Getting Started**

### **Before You Begin**

**Assemble Your Core Team:** Minimum: Headteacher/CEO, Senior Leadership representative, Governor/Board member Optimal: Add IT lead, Safeguarding lead, Staff representative

**Set Expectations:**

* This is strategic planning, not technical training
* Honest reflection is more valuable than optimistic assumptions
* Some cards may reveal you're not ready to proceed - this is success, not failure

**Plan Your Timeline:**

* Allow 1-3 weeks between cards for reflection and information gathering
* Don't rush - strategic decisions benefit from considered thought
* Schedule follow-up reviews 6-12 months after completion

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### **Working Through the Cards**

#### **Sequential Approach (Recommended)**

**Work through Cards 1-5 in order, following the SAFER methodology:**

**S - Strategy: Card 1 - Why are we doing this? How does AI align with our mission?  
 A - Audit: Card 2 - Are we prepared? What is our readiness level?  
 F - Foundations: Cards 3-5 - How do we build the infrastructure for success?**

* Card 3: How do we stay safe and govern effectively?
* Card 4: Can we sustain this financially and operationally?
* Card 5: How do we bring all stakeholders along?

**Each phase builds on the previous ones, creating a systematic pathway from strategic vision through to implementation readiness.**

#### **Targeted Approach**

**If you have urgent decisions to make, you can focus on specific cards:**

* Need quick AI tool decision: Start with Cards 1 and 3
* Budget planning cycle: Focus on Card 4 with Cards 1 and 2 for context
* Stakeholder pressure: Begin with Card 5, supported by Card 1

### **Making Decisions**

**Use the Go/No-Go Checkpoints:** Several cards include explicit decision points. These are designed to prevent organizations from proceeding before they're ready.

**Document Everything:** The reflection tools create valuable organizational memory and demonstrate due diligence to stakeholders and inspectors.

**Seek External Support When Needed:** The tools identify when legal, technical, or consultancy expertise would be valuable. Don't hesitate to seek professional support for complex decisions.

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## **What Success Looks Like**

### **Completion Outcomes**

**After working through all five Strategic Foundations cards in the SAFER methodology, you should have:**

**✓ Clear Strategic Direction: Documented vision for how AI aligns with your educational mission  
 ✓ Realistic Assessment: Honest understanding of your readiness and capacity  
 ✓ Robust Governance: Clear accountability, risk management, and decision-making processes  
 ✓ Sustainable Resources: Confirmed funding and resource allocation for AI implementation  
 ✓ Stakeholder Support: Engagement strategy that builds understanding and addresses concerns**

### **Decision Confidence**

**You should feel confident answering:**

* Should we implement AI in our institution?
* If yes, what should our implementation priorities be?
* What governance and support structures do we need?
* How much should we invest and can we sustain it?
* How do we maintain stakeholder support throughout the process?

### **Implementation Readiness**

**The Strategic Foundations process should leave you either:**

* Ready to proceed with confidence to implementation planning
* Clear about gaps that need addressing before proceeding
* Informed about alternatives if AI implementation isn't right for your context

## **Remember: Strategic Planning Is Success**

The goal of this process is not to push every institution toward AI implementation. The goal is to ensure that whatever decisions you make about AI are informed, strategic, and aligned with your educational mission.

If working through these cards leads you to decide that AI implementation isn't right for your institution at this time, that's a successful outcome. Strategic restraint is as valuable as strategic innovation.

## **Support and Next Steps**

### **If You Need Additional Support**

* Legal review of governance decisions
* Technical advice on infrastructure requirements
* Change management consultancy for complex implementations
* Facilitation support for stakeholder engagement

### **After Strategic Foundations**

Organizations ready to proceed can continue with the Implementation Essentials cards (Cards 6-10), which focus on the practical "how" of AI implementation once the strategic foundations are solid.

***The Strategic Foundations Card Deck is part of the SAFER Framework for AI Implementation in Education, developed by Actively Intelligent Education.***

**Remember: The goal is not to implement AI for its own sake, but to enhance educational outcomes while preserving the human relationships and values at the heart of education.**