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Assessing the digital and workforce readiness of local authorities to implement Copilot in Adult Social Care in Wales

ASSOCIATION OF DIRECTORS OF SOCIAL SERVICES (CYMRU)

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Acknowledgement

Executive Summary

The Welsh Local Government Association (WLGA) commissioned the Association of Directors of Social Services (ADSS) Cymru, working with STABLE to undertake digital and workforce readiness assessments to consider Microsoft Copilot adoption in adult social care services across Wales.

All local authorities participated in at least one aspect of the workforce and digital assessment activities undertaken. Thorough investigations around preparedness of digital systems and the workforce were undertaken by ADSS Cymru and STABLE in partnership with local authorities.

In general, there is optimism and enthusiasm for the potential of AI to support more effective and efficient working. However, there is a need to ensure that robust governance is established, and that clear guidance is provided around appropriate usage to ensure data protection and security requirements are met, as well as alignment to practice and professional standards. Additionally, ethical considerations should be further explored to support adoption that enables person-centred care to remain at the core, preserving the role of practitioners as the owners of information. Content generated by Copilot should be quality assured and viewed as a tool to support practitioners, rather than as a replacement to professional judgement and decision making through evidence-based practice. Limitations to existing Welsh language capabilities can be offset by working closely with existing Welsh translation teams, and there should be efforts to work with providers to improve large language models and the quality of Welsh language features over time.

Adoption needs to be measured and undertaken at a pace that supports readiness activities as well as upskilling employees to feel comfortable and confident in using Copilot. Implementation should be supported by senior leaders and the involvement of frontline practitioners from the outset is seen as a key success factor. Resources will be required to support adoption, and local authorities may wish to consider external expertise to deliver benefits and improvements to services.

Implementation should be supported by workforce and digital champions networks, and robust sector and role specific training should be developed that recognises the different needs of teams and practitioners. Ongoing training and support should be available to employees following adoption. There is potential for new roles such as digital innovation officers or champions to support this work.

Digital assessments identified that the basic IT infrastructure is in place to facilitate Copilot adoption in most local authorities, but that there will need to be additional readiness activities undertaken by digital and corporate teams in some regions to ensure the security and safety of using the technology. The cost of licences can be offset by investing in a small number of higher licences for technical users involved in digital background activities, followed by a larger number of lower-level licences for everyday users once the environment is in place. Specific technical recommendations are included in the report to ensure that Copilot is operated in an environment that is safe and where effectiveness is maximised.

With inevitable regional variation and some local authorities already well into their journey of adopting the technology, there is significant potential to learn from early pilots and activities and to consider once for Wales approaches that will support moving forward at pace.

Society is embracing technological transformation, including the UK and Welsh Governments. While the technology has been swiftly adopted in business settings, social care has so far understandably, adopted a more cautious approach. There is an emerging evidence base of the potential for AI to transform public services, and Welsh local authorities are generally receptive to taking forward Microsoft Copilot. However, this will need to be done with national and local

leadership, and implementation must be carefully constructed to ensure that the integrity and safety of service delivery, as well as the confidence of employees and the public is maintained.

This report sets out the activities that were undertaken to assess workforce and digital readiness for Copilot adoption. Following a detailed desktop review and engagement activities, the report provides discussion about key themes and provides a suite of recommendations. Recommendations are set out for national bodies, local authorities, as well as the provision of more technical digital guidance for information technology teams that will need to undertake preparatory activities to support adoption.

Recommendations

General

1. It is recommended that local authorities adopting Copilot in adult social care use a phased approach to implementation, establishing clear delivery plans, risk registers and project controls to support adoption. Dedicated resource should be in place to support this.

For National Bodies

It is recommended that:

2. The workforce Champions Network, established at the start of the project, continue meeting to support learning and shared approaches to adoption;

3. The existing AI subgroup of the Digital Advisory Group supports shared digital learning and national approaches to adoption, as well as once for Wales labelling taxonomy;

4. National bodies, such as the Welsh Government AI Commission for Health and Social Care support local authorities with legal advice and national guidance and that once for Wales training approaches are explored within the networks to support implementation;

5. Once for Wales guidance be produced to support local authorities in taking decisions about which digital controls must be activated to achieve acceptable use of Copilot. This will require input from strategic, IT and HR colleagues, and will involve consideration of UK and Welsh guidance already in place;

6. Opportunities for funding licenses at scale be explored, and that the evidence base to support a once for Wales business case is developed;

7. Improvements to large language models supporting Welsh translation technology are advocated with the Welsh Government and Microsoft, to ensure continuous development of Welsh language capabilities

For Local Authorities

It is recommended that local authorities:

8. Use their digital readiness assessments and the Social Care Wales digital readiness tool to support activities that prepare the digital network for Copilot adoption;

9. Ensure prompts and guidance on safe usage 'top tips' are followed by everyday users, to ensure appropriate engagement with Copilot, and to minimise risk of data security concerns;

10. Obtain a small number of higher-level licenses to support readiness activities that prepare networks for adoption. This will result in cost savings and maximise functionality ahead of

wider rollout to the everyday user, who can operate on lower-level licences;

11. Further investigate the potential integration of Microsoft 365 Copilot with existing software and case management systems;

12. Consider an annual re-scan to monitor progress towards adoption of Copilot;

13. Ensure the strong and visible support of senior leadership, and that they involve practitioners and managers in the roll out of Copilot;

14. Identify opportunities for ongoing support and engagement for users of Copilot in daily practice.

Technical Digital Recommendations

It is recommended that local authorities:

15. That have not already done so should move from on-premises repositories to SharePoint;

16. Develop a once for Wales approach to labelling, learning from local authorities that are further ahead to develop a taxonomy that can be used across local authorities. This could be facilitated by the DAG AI subgroup, and should consider sensitivity labelling, data loss prevention tags and retention of files;

17. Explore the potential to improve digital governance using controls that support safer monitoring and management of sensitive information, and that strengthen data loss prevention.

For 'Core' Functions, it is recommended that local authorities:

18. Utilise the 'administrative audit' function to monitor data protection, and to consider whether analytics functions are needed to deliver appropriate governance;

19. Ensure that Office desktop applications are kept updated to ensure that latest features can be accessed;

20. Enable the SharePoint restrictive search function until they have been able to establish their labelling, to allow only high usage, low risk sites;

21. Undertake a SharePoint Risk assessment, with an inventory and mapping exercise for each site. This will require resource to support but will ensure appropriate usage;

22. Pursue compliance with the device management functions, which ensure phones, laptops and other devices are secure and that settings around acceptable risk are defined;

23. Set default sharing settings to 'view' rather than 'edit' which limits who can alter files, and that expiration standards are agreed and applied to ensure shared links are only accessible as required;

24. Establish governance practices such as regular eDiscovery scans and monitoring, to ensure that AI systems are being used appropriately and to monitor cyber security.

For 'Best-in-Class' Functions (for local authorities that have E5 licences) it is recommended that:

25. Risk-based dynamic settings be used, to set up more advanced monitoring for devices and users of 365;

26. Communication compliance settings be configured to support responsible AI use, analysing

Copilot interactions on an ongoing basis;

27. Automatic functions like labelling, data loss prevention and retention be put in place, to achieve greater efficiency

Introduction

The introduction of artificial intelligence (AI) in recent years presents the potential to radically change the world of work in modern society. By leveraging AI, governments and public institutions may be able to enhance efficiency, improve service delivery, and support informed decision making, ultimately leading to improved outcomes for people.

The Welsh Local Government Association (WLGA) have commissioned Association of Directors of Social Services (ADSS) Cymru to undertake a Wales wide review of local authority readiness to implement Microsoft Co-Pilot into social care management processes. ADSS Cymru worked in partnership with STABLE, an organisation that supports Microsoft technology solutions. The Steering Group agreed not to share local authority specific information and signed non-disclosure agreements to ensure the privacy of those engaging in digital assessments. Wider thematic analysis was provided to support the report. This work took place between September 2024 and March 2025. Copilot was selected as the system to assess for readiness as all local authority's use Microsoft Office 365. Previous work (available on request) identified that Copilot was already being in use in several regions and that it works alongside other Microsoft 365 apps already in use within local authorities in Wales, such as Word, Excel, PowerPoint, Outlook, Teams, and more.

This paper sets out the digital and workforce readiness of local authorities in Wales to adopt MS Copilot in adult social care. A desktop review identifies existing areas where this has already been successfully implemented and highlights potential opportunities and risks. A thematic analysis of digital and workforce readiness assessments is presented, alongside insights obtained from extensive engagement with stakeholders including practitioners, digital leads and service managers. A resource that was developed by user focus groups sets out specific prompts that could be used to support adult social care service functions in Wales.

Specifically, this research considers how Copilot might support practitioners in the delivery of their functions under parts 2 and 3 of the implementation of the Social Services and Wellbeing Act[1], which includes the functions delivered by first point of contact services, and the duty to undertake an assessment of need in social care, as well as the review of assessments. The work considers how the technology may support service delivery for adults over the age of 18.

Finally, the paper sets out key themes and conclusions, including a set of recommendations about the potential implementation of the product and how this might be taken forward by local authorities that choose to adopt it.

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[1] Social Services and Well-being (Wales) Act 2014 [SSWWA]

Background

Local authorities face numerous challenges in modern times, from funding and financial pressures to workforce challenges, including the recruitment and retention of staff, ongoing impacts from the Covid19 pandemic and regional disparities.[2]

For this reason, it is important that social care employers focus on embedding practices that maximise the time available to spend with individuals and that free up professionals to deliver high quality, person-centred care, supporting more manageable workloads. Currently, social care staff spend a significant amount of time on manual administrative tasks, which assessment participants advised is often done using outdated and unintegrated software that results in duplicated work.

> Researchers found that simply managing information and data is taking each public sector worker more than eight hours every week, and that this is having a major impact on staff performance and morale. A shocking 45% of public sector respondents say they are 'drowning in unnecessary administrative tasks' and 45% also say this high admin workload is negatively affecting their mental health and wellbeing. Half of respondents also say high admin workloads are compromising the quality of service they provide (48%) and limiting the time they can spend with the public or patients (49%).[3]

While addressing these challenges will require a wide range of mitigations and reform, one area showing potential promise is innovation in the adoption of artificial intelligence (AI).

AI is already being used in several sectors. In healthcare, it is supporting more accurate diagnosis, decision making and the prediction of potential outbreaks. In business, it supports efficiency and auditing, analysing market trends and maximising potential profit.

The adoption of AI in social care settings has been more gradual. Public services are beginning to use AI more routinely with some evidence of early promise – however, it will be essential to address challenges and to ensure that any system adopted have security around data privacy, protection and ethical use to ensure that the technology benefits everyone fairly and equitably.

The transformative potential of AI

The Prime Minister, Sir Keir Starmer MP announced the AI Opportunities Action Plan[4], which supports the growth of artificial intelligence in public services, and a specific ambition of AI being 'used by the public sector to enable its workers to spend less time doing admin and more time delivering services'.

Microsoft Copilot, launched in late 2023, is a chat interface that allows the user to search for information, to generate text and to produce summaries from multiple file sources, based on

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[2] Brown, Thomas. (2021) Social Care: challenges, funding and reform. [Online] Available at: Social care: challenges, funding and reform - House of Lords Library [Accessed: 4 February 2025].

Holt, Alison and Butcher, Ben / BBC news. (2021) Social Care: What are the challenges facing the system? [Online] Available at: Social care: What are the challenges facing the system? [Accessed 4 February 2025]. Care England. (2024). Care Trends Report 2024: Insights Building the Future of Social Care. [Online] Available at: Care Trends Report 2024: Insights Building The Future of Social Care [Accessed 4 February 2025].

[3] Milward, Hugh. (2024) Tackling the public sector puzzle with AI. [Online] Available at: Tackling the public sector puzzle with AI - Microsoft Industry Blogs - United Kingdom [Accessed 16 February 2025].

[4] McMahon, L, Kleinman, Z and Edwards, C. / BBC News. (2025). PM plans to 'unleash AI' across UK to boost growth. [Online] Available at: Artificial Intelligence: Plan to 'unleash AI' across UK revealed - BBC News [Accessed 21 January 2025].

prompts that are typed or spoken into the interface. Copilot can manage diary functions, transcribe calls and meetings, archive files, and develop chronologies. The tool can support audit and review processes and make sense of large volumes of information to support decision making. These functions are translatable in the context of the administrative tasks undertaken in daily practice by social care staff.

> To make a decision, case workers must collect and analyse data from multiple disparate sources and Copilot can help them to quickly surface all the information they need from within hundreds or thousands of documents[5]

Evidence Base

It should be noted that there is not yet a robust evidence base to support the use of Copilot in social care settings. Some examples follow detailing emerging evidence and use.

The potential benefits of AI includes time savings – similar technology (Note) was recently found to save more than £2m in labour costs for social workers using it to develop assessments, resulting in a reduction in handling time for a case by 218 minutes and handling of more than 11,500 new referrals and 3,000 extra assessments[4] However, the evidence base for Copilot's use in social care is still in its infancy, which has led to a more cautious approach to adoption.

The Australian Government undertook a [trial of copilot](#)[6] using 5,765 licenses between January to June 2024. This trial and evaluation tested the extent to which much of the wider promise of generative AI capabilities would translate into real-world adoption by workers. Findings indicated that

> There are perceived improvements to efficiency and quality for summarisation, preparing a first draft of a document and information searches. However, the adoption of generative AI requires a concerted effort to address technical, cultural and capability barriers and to improve usage.

Another caution was around the need to vet products created by Copilot - 'Copilot's potential unpredictability and lack of contextual knowledge required time spent on output verification and editing which negated some of the efficiency savings.' At the end of the trial, 77% were optimistic about Microsoft 365 Copilot, 86% of participants wished to continue using it, 1 in 3 used Copilot daily and 75% of participants who received 3 or more forms of training were confident in their ability to use Copilot, 28 percentage points higher than those who received one form of training.

A final recommendation in the report suggests that 'agencies must configure their information systems, permissions, and processes to safely accommodate generative AI products.'

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[5] Gibson, Rebecca. (2024) How technology helps to deliver better health and social care. [Oline] Available at: [How technology helps to deliver better health and social care - Technology Record | The best of enterprise solutions from the Microsoft partner ecosystem](#) [Accessed 21 January 2025].

[6] Australian Government. (2024) Evaluation of the whole-of-government trial of Microsoft 365 Copilot: full report. [Online] Available at: [Microsoft 365 Copilot evaluation report in full | digital.gov.au](#) [Accessed 21 January 2025].

Examples of Copilot implementation in UK social care settings

There is some evidence emerging of the potential benefits in UK social care settings.

Buckinghamshire Council[7] have reported very positive outcomes from the use of Copilot, saving up to 90 minutes a day on routine tasks during a test project. It was found to be particularly useful in call triage reducing handling times by 30 seconds per call, improving processes, and resulting in better outcomes for users. The technology has also improved accessibility for hearing-impaired staff, transcribing meetings quickly. The local authority has created an AI governance board to oversee developments. Buckinghamshire Council also operate the Local Government Collaboration and Innovation in Copilot Social Care and Education network. Wales are members of this group. A case example can be found below:

> Emma has been on leave and has come back to over 100 emails that will take her time to trawl through, she also has numerous notifications on [the case management system] which are unclear about what has happened.
>
> She goes to AI and asks for updates on her cases, asking it to look across outlook, SharePoint and [the case management system]. It picks up that there was an urgent contact recorded against a child's record made by the out of hours service, it also details numerous follow up emails that she was included in, summarising them as required. This provided Emma with a clearer picture of the situation and enabled her to quickly prioritise her workload.[7]

Barnsley Metropolitan Borough Council[8] have created prompts for Copilot that generate report templates and letters for bespoke groups and summarise lengthy case files to support review. Copilot has supported the generation of statistical reports on caseload management and service delivery. One prompt supports risk assessment using information from files to highlight risk and protective factors.

While these examples demonstrate the clear benefits of Copilot, it is important that appropriate consideration is given to the safe and appropriate usage of the technology, and that organisations undertake appropriate preparation for its implementation, as explored throughout this review.

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[7] Dawson, Amy/ Microsoft. (2024). Bucks Council embraces 'Dragons' Den' approach for AI roll-out. [Online] Available at: Bucks Council embraces 'Dragons' Den' approach for AI roll-out [Accessed 22 January 2025].

[8] Local Government Association. (2025). Barnsley: Pioneering use of Microsoft Copilot. [Online] Available at: Barnsley Council: Pioneering use of Microsoft Copilot | Local Government Association [Accessed 4 March 2025].

The Case for Change in Wales

The [Digital Health and Social Care Strategy for Wales](#)[9] sets the ambition of 'working with partners to drive innovation, particularly in AI and data insights.'

This work will involve integrating digital solutions into the social care system to improve service delivery, support care providers, and empower those receiving care.

A Healthier Wales [Workforce Strategy for Health and Social Care](#)[10] sets out the ambition

'Our workforce will be supported to deliver care using digital skills and the Welsh language aligned to the new approaches of service delivery. Our workforce will be able to optimise digital technology to manage workload and caseloads more effectively'.

The Social Care Engine Room oversees the progress and implementation of digital and AI projects within the social care sector, ensuring alignment with broader goals and adjacent projects to enhance care outcomes. The Wales Digital Advisory Group (DAG) supports this by providing expert guidance and strategic direction, making sure that projects are technically sound and well-integrated into existing infrastructure. The DAG has an existing AI subgroup, which has the purpose of creating a platform for learning, sharing and collaborating on AI-related topics, such as best practices, tools, techniques, challenges, opportunities and use cases. Additionally, Digital Health and Care Wales operates a Digital Governance and Safety committee which may assist in supporting national activities.

An ADSS Cymru report[11] about innovation and good practice during the Covid-19 pandemic highlights that the period of crisis during the pandemic resulted in a much broader acceptance of technological change than is normally seen in social care in Wales, including the rapid adoption of telehealth and digital solutions such as teleconferencing and the use of online platforms. As a result of this more open approach to change, benefits were realised quickly, including greater flexibility and innovation, increased efficiency and improved access to support using new technologies such as video conferencing. Staff adapted well to the swift changes and new ways of working. Concerns included digital exclusion, differences in access to infrastructure, and unequal take up across Wales. Overall, the report underscores the transformative potential of technology in services while acknowledging the need for careful implementation and support to address the challenges encountered.

The Welsh Government has adopted a policy of 'scale and spread' with regards to new technology. A recent Ministerial statement[12] highlights a UK wide approach to innovation and transformation:

> We are working with our counterparts through the UK inter-Ministerial group to develop a common approach to innovation adoption, which recognises joint opportunities across our healthcare systems. In Wales, we are focusing this work on a new Innovations Working at

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[9] Welsh Government. (2023). Digital and data strategy for health and social care in Wales. [Online] Available at: [Digital and data strategy for health and social care in Wales [HTML] | GOV.WALES](#) [Accessed 18 January 2025].

[10] Social Care Wales and Health Education Improvement Wales. (2020). A Healthier Wales: Our Workforce Strategy for Health and Social Care. [Online] Available at: [A Healthier Wales – a workforce strategy for… | Social Care Wales](#) [Accessed 7 March 2025].

[11] ADSS Cymru. (2023). Social Care Compendium of Good Practice: Learning from innovation and new ways of working during Covid-19. [Online] Available at: [Publications](#) [Accessed 7 March 2025].

[12] Welsh Parliament. (2024). Plenary 03/12/2024, item 7. Statement by the Minister for Mental Health and Wellbeing: Innovation in healthcare. [Online] Available at: [Plenary 03/12/2024 - Welsh Parliament](#) [Accessed 3 March 2025].

Scale programme, which will be launched next year... This will increase the speed at which we can adopt and implement innovation at a national level.

Further, the statement references a new AI Commission for Health and Social Care launched in 2023, which 'leads on the development and review of the safe, responsible and ethical environment. It is guiding the use of AI in the health and social care sector in Wales.'

Some local authorities have employed digital innovation officers, increasing the potential to maximise opportunities relating to new technology. Social Care Wales' Digital Maturity and Literacy Assessment tool[13] also offers support to develop competencies around digital implementation.

The Centre for Digital Public Services[14] undertook some initial research about the maturity and readiness for automation and AI across the Welsh public sector with the Chief Digital Officer for Local Government and the Welsh Government in late 2023. Early findings suggested that of the eleven local authorities involved, all were either exploring or experimenting with the use of AI in various forums, though none felt fully confident in their application of AI technologies.

Key concerns included the maturity of the technology, the need for governance and guidance and potential disruption to the organisation resulting from implementation. Smaller organisations were taking a cautious approach and learning from larger ones further ahead in the process.

At the time of this initial work, it was found that some employees were using publicly available systems like Chat GPT without regard to potential cyber security issues. An advantage of Copilot is that it enables more stringent security to be put in place, when used correctly.

Barriers identified in the initial research specifically relating to Copilot included the costs for licenses, the lower quality of AI generated Welsh language compared to English, concerns about risk (especially from senior leaders) and not knowing where to start. These issues are explored later in this report in the sections on workforce and digital readiness assessments.

A Gwent consortium of One Wales tenancy partners linked to several local authorities undertook a trial period of Copilot. Via the early adopter's program, 300 licenses were distributed and targeted testing took place to test functions and capabilities, and to identify benefits and potential opportunities. The trial demonstrated key benefits include time savings, productivity gains and positive impact on wellbeing for staff.

As illustrated by the examples of using Copilot across the public sector, there is a range of opportunity and learning that has taken place. However, there must be consideration about its implementation that goes beyond purchasing software to address integration, ethical considerations, data security and resource implications, as well as ensuring that appropriate readiness activities, training and support are in place for users.

These ideas are expressed by KPMG Canada[15] as follows:

As we move beyond the excitement surrounding generative AI, it is becoming increasingly clear that this technology is not just a passing trend. Many companies, however, don't have

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[13] Social Care Wales. (2025). Understand Your Digital Potential Tool. [Online] Available at Understand your digital potential | Social Care Wales [Accessed 1 March 2025].

[14] Centre for Digital Public Services, Welsh Government. (2023). Understanding the maturity and readiness for automation and AI across the Welsh public sector. [Online] Available at: Understanding the maturity and readiness for automation and AI across the Welsh public sector | Centre for Digital Public Services [Accessed 3 March 2025].

[15] KPMG. (2024) Generative AI Adoption Index: Navigating the real-world applications and risks of AI in Canadian workplaces. [Online] Available at: Generative AI Adoption Index report [Accessed 24 February 2025].

the policies in place, nor are they offering the education needed to ensure staff use these tools in the most efficient and secure ways.

This report will explore the readiness of Welsh Local Authorities to adopt Copilot, as well as making recommendations for next steps towards adoption.

Methodology

Governance

The work was overseen by a Project Steering Group which met 4 times over the course of the project. Membership included ADSS Cymru, ADSS Lead Director – Workforce, WLGA, STABLE, Digital Advisory Group (heads of IT), the Social Care Engine Room, and Social Care Wales.

The purpose of the Steering Group was to provide strategic oversight and guidance for the project. This included overseeing the digital and workforce readiness assessment work to determine the preparedness of local authorities for the potential implementation of Microsoft Copilot in statutory social care assessment and care management processes. The Steering Group supported the project team by offering direction, addressing challenges, and ensuring alignment with the project's goals and timelines.

Members of the Steering Group provided updates to the ADSS Cymru Leadership and Workforce Groups, as well as the Social Care Engine Room and Digital Advisory Group, through briefing papers and highlight reports.

The project was designed to engage as widely as possible with representatives of the social care workforce, including senior managers, team leaders and practitioners to enable an assessment of workforce readiness to be carried out. Digital leads were also invited to participate in a digital assessment to give a wider perspective on the digital readiness of local authorities across Wales.

In addition, a desktop review was carried out to explore where Copilot has been successfully used to deliver benefits for social care in other local authority settings.

Desktop Review

A comprehensive desktop review was undertaken, exploring existing resources and intelligence around the implementation of Copilot in social care and the public sector. By identifying examples where Copilot has been used in public sector activities from within Wales and the UK, as well as internationally, the work was informed by learning from other areas that have adopted this technology. Research into the emerging evidence base, and policy and guidance to support implementation was explored.

Approach

Following the desktop review, several workforce and digital readiness activities took place with local authorities. A thematic analysis of all information gathered then supported the narrative that follows through this report.

The core themes that are explored include:

- Readiness for Change
- Culture, Attitudes and Behaviours
- Resource and Capacity Requirements

- Perceived Challenges and Barriers
- Policy Review and Compliance

Workforce Readiness Activities:

Live demonstration Webinar

An initial demonstration and interactive engagement session was held to introduce stakeholders to the work and to address initial queries and comments. This was very well attended, with approximately 250 participants from most local authorities, who were keen to learn more about the project and how Copilot could add value to social care. A frequently asked questions document was produced following the event and circulated, along with links to Copilot training and additional information resources available on the ADSS Cymru's website Copilot.

Champions Network

Each local authority identified champions to engage with the project from inception. These champions came from several different roles within Adult Services e.g. Heads of Adult Services, Service Managers, Principal Officers, Team Managers, Digital Transformation Officers and Workforce Managers. The diversity of the attendees ensured rich and robust conversations at network meetings.

The role of the Champions Network was to:

- Act as advocates for workforce readiness, ensuring staff are considering how they could integrate Copilot into their workflows

- Collect and share relevant information on workforce skills, readiness levels, and training needs related to Copilot

- Facilitate local engagement about Copilot, gather feedback, and communicate the benefits and expected changes

- Consider / identify training and development requirements for staff to ensure effective and confident use of Copilot.

A copy of the Champion's Network Terms of Reference and an outline of the agenda for each meeting can be found in Appendix A.

A resource pack was developed to support Champions, and they were encouraged to share information on the project to generate enthusiasm and provide insights into the views of practitioners within their respective local authorities.

During the second Champions Network, a survey was carried out, using a digital tool, Slido to gather live feedback from the Champions on the readiness to adopt Copilot. This information helped to promote further discussions which has informed the analysis of the data from all workforce readiness assessment activities.

Practitioners Focus Groups

Six focus group sessions were held with three groups of staff between 13th and 20th January 2025, including people working in First Point of Contact settings (27 participants), practitioners undertaking assessments (38 participants) and practitioners reviewing assessments (24 participants). This was done in line with the project scope of considering Copilot for Parts 2 and 3 of the Social Services and Wellbeing Act.

The primary outcomes of the focus groups were to:
- Facilitate discussion around readiness and experience
- Agree the themes to be assessed under workforce readiness

- Improve awareness of how Copilot could help to support practice
- Develop specific prompts to support the speed, efficiency and effectiveness of Copilot in adult social care

The focus groups were carried out in two phases. Each practitioner group was invited to attend two workshops, the first was designed to act as an opportunity for the project team to listen to the issues and pressures facing practitioners on a day-to-day basis, focussing crucially on the administrative burdens impacting on their ability to undertake their functions.

The second workshop played back what we heard, clarifying the accuracy of the discussions and offering some suggestions by way of demonstrations using prompts in Copilot, to alleviate the administrative pressures they had identified.

Survey
An online survey was developed to give all practitioners the opportunity to contribute their views on the readiness to adopt Copilot in their work. This survey was promoted through the Champions Network and by Steering Group members with a link posted to the ADSS Cymru website. It was open to any practitioner or manager working in adult social care. The results of the survey generated further information which informed the thematic analysis across all workforce domains. The survey closed on the 8th of February 2025 and was completed by 92 people.

Of the 92 participants, 71% identified themselves as practitioners, 17% as team or service managers, and 11% as other roles. 43% of participants had up to 10 years of experience working in adult social care, while 57% had over 10 years of experience.

The survey questions are contained in Appendix D

Semi-Structured Interviews
Semi-structured interviews were offered to all local authorities, fourteen agreed to participate and nominated senior officers from social care, human resources or digital support. The conversations were held via Microsoft Teams and were recorded using Copilot which was then used to summarise the conversations. The purpose of the semi structure interviews was to give another dimension to workforce assessments with a focus on the leadership and corporate elements of readiness. The conversations explored the broader aspects of culture, attitudes and behaviour as well as perceived barriers and challenges. Officers gave their views on leading and implementing digital transformation across Wales and within local authorities.

The list of questions used to guide the conversations are contained in Appendix E.

Summary of Workforce Readiness Engagement Activities
The workforce readiness engagement activities aimed to gather as wide a range of views as possible and a summary of the participation rates for all workforce readiness assessment activity is contained in Table 1 below.

Table 1: Workforce Readiness Activities.

Workforce Engagement Activity	Number of Participants	Number of Local Authorities Represented
Live demonstration	208	16/22
Champions Network	22	18/22
Semi Structured Interviews	19	14/22
Survey	92	15/22

Focus Groups	89	19/22
TOTALS	396*	22/22

* Number reflects total number of participants and not necessarily unique individuals i.e. each person may have undertaken more than one activity

Each of the 22 local authorities took part in at least one engagement activity – though representation varied by activity as shown in Table 1.

The analysis of all workforce readiness activities revealed six themes across the following domains:

- Readiness for Change
- Culture, attitudes and behaviours
- Perceived challenges and barriers
- Ethical Considerations
- Resource / capacity requirements
- Policy review and compliance

Digital Readiness Activities

STABLE worked with local authority digital leads to undertake individual digital readiness assessments. Those local authorities that took part have been provided with individualised reports setting out progress towards achieving functionality across several domains. Local authorities were also provided with a technical deployment guide to support activities undertaken in the local context.

Activities included Microsoft Teams conversations and technical assessment and testing. In total, fifteen local authorities chose to take part in a digital readiness assessment and received a bespoke local report and set of recommendations. Seven other local authorities were not able to provide data for the assessment in the timeframes for the project or chose not to participate in the digital readiness assessments.

Two types of assessment were undertaken, one to assess how ready the IT infrastructure is to offer the full functions of copilot, and another to assess the digital environment in which copilot would operate (Microsoft 365).

Following a detailed analysis of readiness across the individual local authorities, this report sets out a national position of readiness for digital aspects of rolling out Microsoft Copilot and provides insights into the overall Wales position to take forward technical aspects of the work. This includes recommendations of work required to support the introduction of copilot and to support technical adoption, alongside challenges and opportunities.

Workforce Readiness Assessment

The analysis of the data gathered from all the workforce readiness activities has been grouped into six themed areas. These are described in more detail in this section of the report.

1. Readiness for Change

Organisational Readiness

As part of the review, we asked local authorities to rate their readiness for change against a red-amber-green model.

Red: The Local Authority is not ready for change. There are significant barriers which would hinder the adoption of Microsoft Copilot

Amber: The Local Authority is somewhat ready for change. There are some challenges, but with additional support and resources, these can be addressed to facilitate the adoption of Microsoft Copilot

Green: The Local Authority is fully ready for change. There is a strong digital infrastructure in place, staff are well-trained and open to new technology and there is a clear plan for implementing Microsoft Copilot.[16]

Most local authorities categorised themselves as being in the 'amber' category for workforce readiness while four participants were either green or approaching green. This information was obtained from the 14 local authorities taking part in semi structured interviews. Most of the members of the Champions Network agreed with an amber status for their local authority, although six representatives felt that their local authority was still in the red category and not yet ready for change.

Observations from those who felt their local authority was not yet ready included a view that existing technology was not being used to its full potential, that there was a lack of investment in moving forward, and that senior leadership was not supportive. Barriers and challenges are explored in more detail in section 3 of this chapter.

There was wide variation in terms of views and action towards implementing Copilot – some organisations had already purchased numerous licenses and rolled them out across teams. Others were either undertaking small pilots or had tried aspects of Copilot in practice. A few local authorities were very much still at conception, considering their options and researching a range of technologies alongside Copilot before taking a decision about how to proceed. Other potential AI solutions such as Magic Notes and Mosaic case management system were mentioned.

An analysis of responses indicated common characteristics amongst those local authorities that considered themselves to be more ready for change. Readiness factors are explored below.

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[16] Traffic light photo: This Photo by Unknown Author is licensed under CC BY-NC

The support of senior leadership

Several local authorities highlighted that having the support of the senior leadership team was a critical factor to success. Some of the activities that demonstrated this support included positive messaging about how teams can use the tools, providing reassurance that jobs are not under threat, assurance that governance and ethical concerns are being addressed, and ensuring that artificial intelligence approaches are embedded in all business plans.

Having working groups in place

Organisations feeling more ready for implementation had established working groups, to establish guidelines and to develop implementation plans, as well as having forums to address concerns. One local authority had established an AI Governance Board, while another has a community of practice in place. In general, those that had previously implemented large digital changes felt more ready than those that had not.

**Identifying programme leads and champions**

Of the more ready local authorities, having identified leads and champions to both promote the potential of the work, and to have dedicated capacity to support its implementation was cited as important. Examples of roles that have been established include 'implementation and delivery manager', 'digital transformation support officer',

Practitioner and Manager Readiness

Awareness and Understanding of Digital Tools

The survey explored self-rated comfort with using digital tools, and individual practitioner / manager awareness of Microsoft Copilot. It was one of the first activities undertaken - as chart 1 below illustrates, most individuals working in local authorities expressed feeling either somewhat or very comfortable in the use of digital tools in daily working (96%). However, inversely many fewer had awareness of Microsoft Copilot at the outset of our work, with the majority (61%) feeling either somewhat or very unfamiliar with the application.

Chart 1: Survey Questions: How familiar are you with the concept of Microsoft Copilot? How comfortable are you with using digital tools in your daily work?
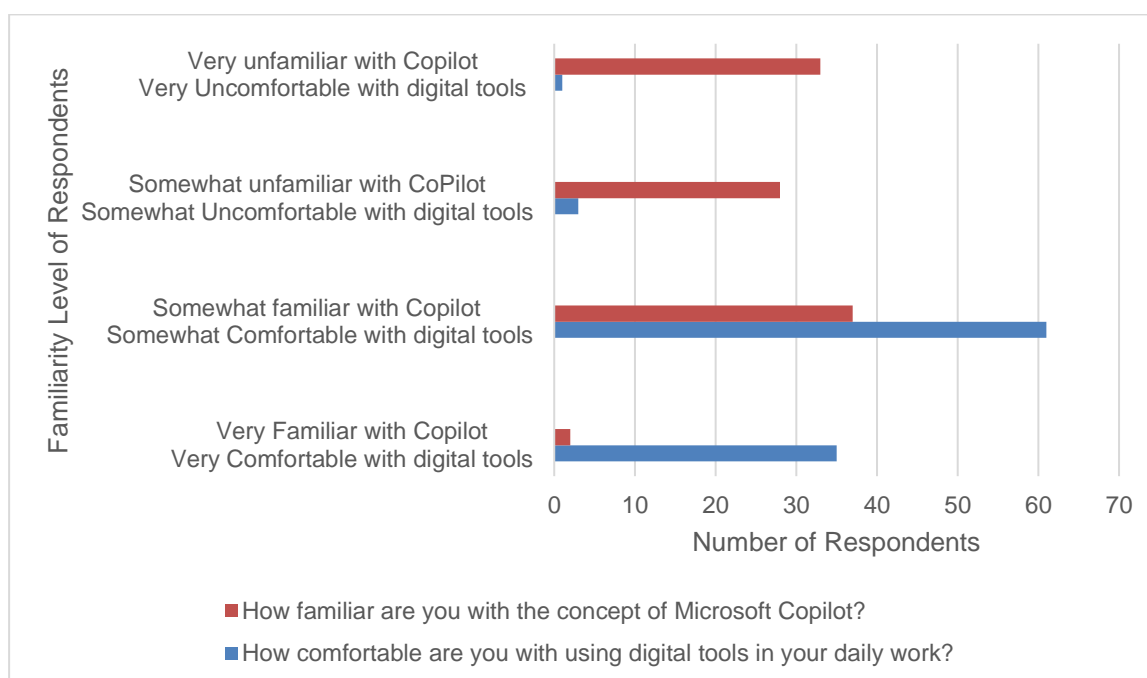
Readiness for Change

As the workforce readiness assessment work progressed, the workshops with practitioners provided more information and discussion about Copilot. A poll was undertaken at the end of the three sessions – 60 practitioners responded. As illustrated in Chart 2, there was clear evidence of improved understanding and confidence around the use of Copilot, as well as a desire to continue learning more about it.

Amongst those surveyed and participants in the Champion's Network, there was a strong sense of receptiveness towards changes in digital technology as it relates to daily working in adult social care. 42% of survey participants said that they were 'somewhat ready' for the implementation of changes to daily working, and 43% felt 'very ready' for change. Only 14% of survey participants said that they were 'not ready'.

Chart 2 illustrates focus group views towards administrative tasks – they are generally felt to be onerous and time consuming, reducing time that could be spent working directly with individuals.

Chart 2: Focus Group Slido Question: Agree/ Disagree with the following statements
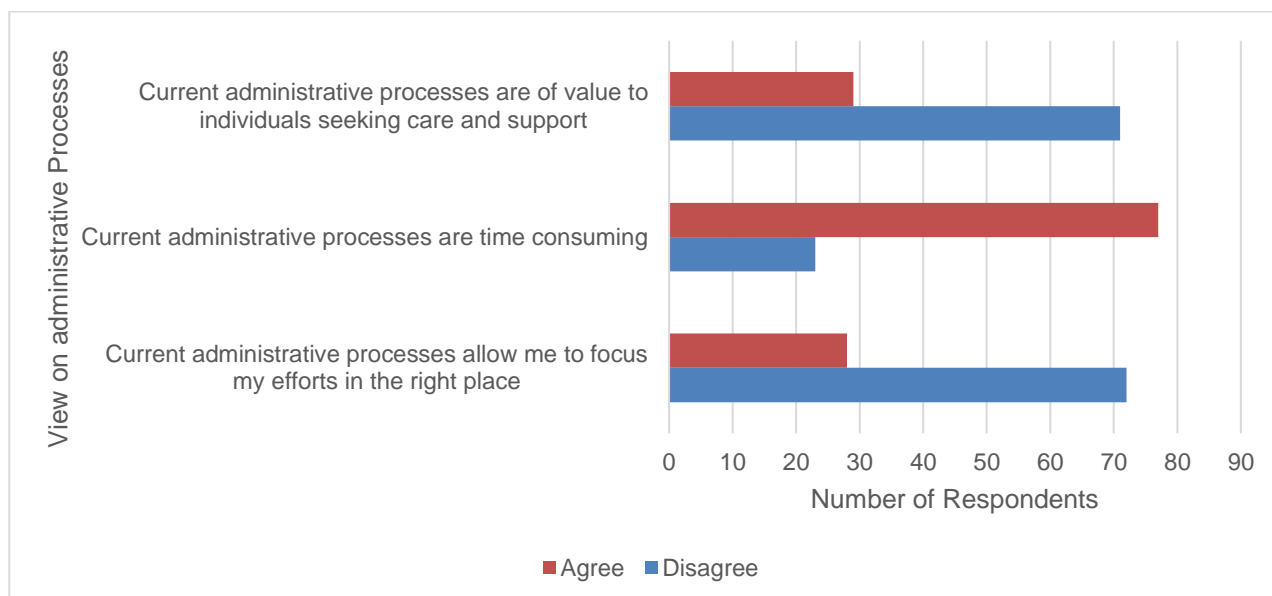
Focus groups identified that the top 5 administrative tasks that they find most time consuming include case recording, writing and reviewing assessments, handling correspondence, writing care and support plans and writing meeting notes.

Therefore, the workforce is feeling cautiously positive about the potential of Copilot to improve the efficiency and effectiveness of practice.

Confidence in using Copilot grew through discussions in the focus groups. While survey respondents initially reported not knowing a lot about Copilot, at the end of the second focus group sessions, we asked each participant; With the right support / training, how ready do you feel to work in this way?

Sixty practitioners responded across the three groups:

- 43% – Would like to make a start as soon as possible
- 43% – Would like some more workshops to learn more, but I think it is a positive move that could help me
- 8% – Were not sure at this stage and have more queries about how it could work in practice
- 5% – Cannot see the benefit of using Copilot

Feedback from the focus groups showed that practitioners were much more comfortable with exploring a tool such as Copilot when it was aligned with their function and where they could directly see the application to their day-to-day workflow. Where there was previously apprehension and unease the general feeling following the sessions was that practitioners were interested and receptive to exploring the use of Copilot in more depth.

2. Culture, Attitudes, and Behaviours

Participants were asked a range of questions to establish the current culture, attitudes and behaviours of organisations and employees towards Microsoft Copilot implementation.

Employee Attitudes

There was variation in how people feel about possible changes relating to the use of Copilot. In general, local authorities reflect a mixture of attitudes, with many employees openly embracing the potential benefits of the technology, while others are more cautious or sceptical. One participant reflects an attitude of being 'cautiously welcoming' of Copilot.

A few organisations noted very strong support and excitement about AI, with many requests to take part in pilots and working groups.

Of those less likely to embrace the change in technology, concerns included the impact on self and role, on the quality of practice and on the experience of the person accessing care and support. Some social workers were more cautious about the need to use AI as a tool rather than a replacement for activities – there was commentary around the potential of becoming deskilled, and potential impacts on professional judgement if overly reliant on AI. Others had concerns about confidentiality. These concerns are explored in more detail in section 4 (ethical considerations). How effectively these concerns were addressed by the employer was found to correlate strongly with the confidence levels of employees to move forward with changes. Those who had previously had negative experiences of technological changes were less likely to welcome further change, while participants that had had positive experiences were more likely to embrace change.

Here are some examples of concerns raised by survey participants:

'I would not recommend implementing or using Copilot during in-person assessments, as this could come across as impersonal or less empathetic, potentially undermining the rapport and trust essential in these situations'

'Although it could be a useful tool for assessing capacity, I would need to be confident the individual could consent, or I could be confident of evidencing it would be in their best interest'

'I think it's too early to implement the use of AI and this is an ethical concern, which could pose a risk of deskilling and undermine the profession of Social Work'

Survey respondents ranked a list of concerns (from highest to lowest), reflecting that a key factor influencing views was how confident the person felt about their understanding of the technology. This suggests the importance of providing adequate training and support to employees.

Concerns about Copilot

Rank your concerns (highest to lowest) about the use of Copilot in social care?

1   Lack of understanding or training

2   Impact on quality of decision making and analysis

3   Data privacy and security

4   Ethical Consideration

5   Potential Changes to my Role

6   Deskilling My role

Despite these concerns, most survey respondents expressed positive attitudes towards Copilot, as illustrated in Table 2. 69% expressed positive feelings, 13% expressed negative feelings, and 18% said they would need to know more about Copilot to have a view. Below is a summary of responses to the question 'How do you feel about the potential use of Copilot to assist you to carry out your role'

Table 2 – Survey respondent attitudes towards Copilot adoption.

😄	Optimistic	47%
😃	Excited	22%
😬	Anxious	4%
😔	Sceptical	9%
😑	Need to know more	18%

This range of attitudes was demonstrated throughout activities, with a selection of quotes below highlighting the diversity of views towards the technology

'It's proving really helpful for minutes, but it will take me awhile to get used to more functionality'

'I believe Copilot would be a game changer and would significantly support our administrative pressures within our caseload'

'I would prefer to write up my own work than system generated'

'I would not recommend implementing or using Copilot during in-person assessments, as this could come across as impersonal or less empathetic, potentially undermining the rapport and trust essential in these situations'

Chart 3: Focus Group Question: With the right support and training, how ready do you feel to work in this way?
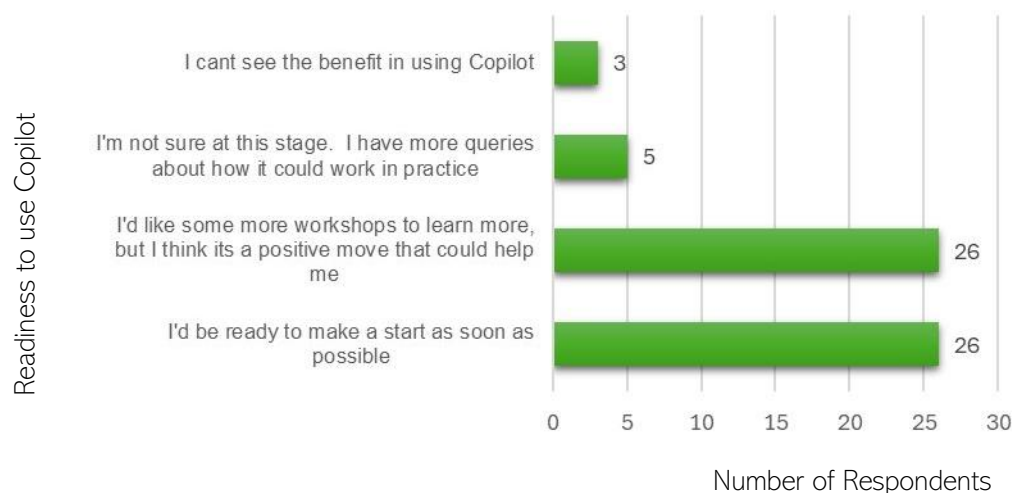
Focus groups identified the tasks they felt Copilot could be most useful in day to day working. These included summarising emails and documents, preparing notes and documents such as panel applications and assessments, and creating an overview of meetings. As identified in chart 3, survey participants were split between needing to know more about the technology and being ready to make a start as soon as possible.

Organisational Culture

Those organisations that have been successful in creating a positive adoption environment tended to have strong support from management, as well as senior IT staff championing the change. Positive messaging about how tools can support staff to spend more time with people, providing reassurance that jobs are not under threat, and ensuring that employees remain in control of records helped employees to overcome anxieties. Focusing on the benefits to people accessing care and support was also noted to be important, rather than concentrating purely on efficiencies in process or time management. The adoption of a culture that listens to concerns was felt to be important.

Those Local Authorities with working groups in place reflected more positive views towards Copilot. One local authority expressed having so much enthusiasm that it had become difficult to manage

Of those that have previously implemented large digital change, involving employees from the beginning was seen as a critical factor to success, with a need for consistent positive messaging, reassurance and support throughout implementation. By shaping changes together from the beginning, it has been possible for organisations that are more ready to understand and tailor implementation to the needs of individual service areas and to the type of practitioner.

> 'We need to bring everyone along, balance the enthusiastic with the resistant, and ensure quality in service delivery'

3. Perceived Challenges and Barriers

Throughout the assessment activities, participants were asked to identify any perceived challenges and barriers to implementation.

Organisational Perceived Challenges

Senior leaders identified a range of potential challenges that could pose a threat to adoption at an organisational level. These are summarised below in order of importance.

Funding

From an organisational perspective, the biggest potential barrier to adoption was felt to be a lack of funding to purchase licenses, at a time of budgetary restraint. Some local authorities reported having a pool of licenses to test the product (normally no more than 20, with one local authority having invested in 50), and were in the process of trying it in a few areas. While there was acknowledgement of potential benefits and time / cost savings, it was felt that there is still not enough evidence to support largescale upfront investment in the product in some cases.

> 'IT are resistant to Copilot as is the head of finance as it's unclear how this can have monetary savings.'

It was noted that the cost of Copilot licenses is somewhat higher than other types of software packages including being nearly double the costs of a social care case recording system in one instance.

IT infrastructure

The lack of appropriate IT infrastructure to support the change. Several local authorities reported having out of date case management systems that would not be compatible with Copilot. Others queried whether it was appropriate to use in conjunction with social care information management and case management systems or with non-cloud-based applications. Not all local authorities have completed full Office 365 rollout, which would hinder the potential to use Copilot to good effect. In general, the interface between Microsoft Copilot and other products was felt to be uncertain, and several participants noted the need for further exploration before determining whether Copilot was appropriate for them.

Capacity to support change

Another key issue highlighted the additional workforce capacity that will be required to initiate a large-scale change at a time of competing challenges. Participants were mindful that they did not want to overwhelm staff with changes to practice – this was particularly true in local authorities where other recent changes and transformation activities have taken place.

Governance

Having policies about appropriate use and limitations and ensuring quality assurance were all high on the list of priorities – and it was noted that most local authorities had not yet put these in place. A review of existing technology policies, appropriate oversight of implementation, and assurance of compliance with legislation such as GDPR are all essential, however the time, expertise and resource required are not in place across all local authorities.

Welsh Language

Several local authorities cited major problems relating to Copilot's ability to understand and to translate the Welsh Language. Currently, translation technology is not at a level that is advanced enough to provide reliable transcripts and summaries. One local authority has found using the initial translation a useful tool to give Welsh translation teams a 'head start' in doing translations. They have set up a function where all Copilot transcripts go to the team to check before finalising.

Another issue is when there are two or more languages spoken in a call or when a speaker has a particularly strong accent – this can impact on Copilot's ability to understand and use materials. The risk of this is that the contributions of speakers who do not speak English or have an accent that Copilot struggles with are not given the same weight in summaries as those speaking English. At least two local authorities have identified this as a major barrier to adoption.

Practitioner and Manager Perceived Challenges

For practitioners and managers, barriers identified at organisational level, and lack of appropriate IT infrastructure was a shared concern. However, survey respondents ranked digital skills and ethical concerns above issues relating to resources or funding. The table below illustrates the concerns identified by survey participants.

Perceived Challenges and Barriers
Rank your concerns (highest to lowest) about the use of Copilot in social care? (SURVEY)

1. Lack of digital skills amongst staff
2. Inadequate IT infrastructure
3. Resistance to change
4. Ethical Concerns
5. Lack of resources
6. Lack of funding

Knowledge and Digital Skills

Champion Network participants noted that some practitioners are unsure how to use Copilot with the case management system safely, and that there needs to be more robust training and support offered to those using it to ensure appropriate use. Digital skills amongst practitioners were said to be variable, with training currently quite sparse and not tailored to needs. Those less confident with using digital tools were said to sometimes be less open to trying new things and more comfortable staying with lower tech options in their daily work as a result.

IT infrastructure

In addition to the overarching issues identified in the survey and interviews, Champion's Network participants who are using Copilot highlighted that the system does not work with shared or group emails. Others queried whether it would work with case and information management systems.

Equipment

One region is moving away from using mobile phones but noted a lack of hardware such as laptops and desktops. Wi-Fi availability was cited as another issue in some regions as was the need to provide adapted technology such as specific screens, equipment to record conversations, storage for recordings. It was noted that care staff in adult services use mobile services, and it was unclear if Copilot would work with this. More investigation is needed around whether telephone systems will link to Teams or other software to be able to transcribe calls (for example in Information, Advice and Assistance (IAA) services where large volumes of calls from the public are received).

Mitigation Strategies and Enablers

Discussions highlighted a range of strategies to mitigate some of the challenges identified above. There were also enablers identified by local authorities that have already worked with Copilot.

Understanding employee and team needs
It was identified that the [Social Care Wales Digital Assessment tool](#)[13] could support better local understanding of team and professional needs. It was recommended that there is a focus on each adult service type (older persons services, first contact, learning and physical disabilities teams etc). Participants that had undertaken digital transformation projects in the past also advocated those systems and processes be kept as simple as possible to reduce risk of using incorrectly. Adopting a user-friendly approach will ensure that a wider group of staff have the digital competence to use the technology. There was also a suggestion that having a business support person trained in Copilot was very supportive to the wider team.

Maintaining open communication
Consistency in conveying a clear vision and involving staff from the beginning were thought to be enablers to successful adoption, as described in the following quote: '[Staff] need to have a view and a voice in shaping the future and be able to influence the change'

Planning and Pacing implementation
Local authorities felt that these challenges could be overcome with careful planning and phased implementation. One area noted that by 'ensuring a low and slow rather than big bang' approach, they were able to successfully make progress. 'A sense of strong ownership and decision making' was also felt to be helpful to convey a carefully thought through and managed plan.

Welsh Language
While there is no immediate solution to the improvement needed to language technology, one local authority has been able to overcome some of the challenge by arranging for AI-developed documents to be shared with the Welsh translation team internally to review and adjust as required, before being used in practice. While this action adds a further step, it does ensure that the reports generated by Copilot are fit for purpose.

4. Ethical Considerations

Throughout the assessment period, participants discussed the potential ethical considerations that should be made in relation to the adoption of Copilot. Key issues are summarised below.

Data Protection and Security

Some participants expressed concerns about how sensitive information would be used by the software, and around ensuring only appropriate sources are used in tasks such as summarising information. There is some validity to these concerns. There are several settings that need to be activated within the IT infrastructure to ensure the safe usage of Copilot and the protection of files in compliance with security protocols. It is also important that the chat interface is used in such a way that it draws on appropriate sources. There is some potential for user error, and there are some simple tips that can be adopted to ensure errors do not occur. Appendix C contains a list of user tips, and should be read in conjunction with the list of suggested prompts for use in adult social care contained in Appendix B. It is important that appropriate policies are in place and that staff receive adequate training to use Copilot effectively.

Use of AI in court

There were some questions about whether courts would accept AI generated documentation, and whether its use needed to be indicated in formal briefings and reports. This is an emerging area of consideration for governments and there might be differing attitudes across different jurisdictions, and one recent example in Australia highlights how this is being responded to.

New South Wales issued a new rule from February 2025, stating that AI must not be used in generating the content of [legal documents]. The Court is keen to ensure that [these documents] should reflect a person's own knowledge, rather than AI-generated content.[17]

Local authorities asked that Welsh Government provide a steer and ensure support and advice as to how AI can be used in public services and court settings to inform practice.

Person Centred Care

Social workers highlighted the importance of maintaining the person-centred relationship between practitioner and person accessing care. They felt that while AI could assist with administrative tasks, it must not detract from how people interact with each other. There was some concern that the way information is prioritised may be different to the weight of importance placed on information by a practitioner making clinical judgement– AI may prioritise information that is not important to the person. Another concern was AI hallucination, or the technology filling in the blanks where there is not sufficient information to make a judgement. Practitioners emphasised the importance of AI being seen as a support tool, rather than a new way of interacting.

Consent issues and privacy

Participants highlighted a need to balance privacy and security concerns with efficiency. Some of the questions raised that will need clarity include whether to inform people accessing care and support about AI usage of their information, and whether consent is required in certain circumstances. A few highlighted that not all people are comfortable with being recorded, and that informed consent would need to be obtained in these instances, along with the opportunity to opt out.

Another area of consideration is how to weigh up what is in an individual's best interests where they lack the mental capacity to understand / provide informed consent. It should be noted that similar issues were raised when computers were first introduced, replacing paper notes. There is a need to define boundaries and expectations.

One participant states,

> 'Although it could be a useful tool for assessing capacity, I would need to be confident the individual could consent, or I could be confident of evidencing it would be in their best interest'

Public Perception

It was noted that the introduction of AI should be considered in relation to how it may be perceived by the public. Some participants expressed concern that media may interpret the introduction of AI as replacing human contact, the essential service provided by social care. This is reflected in wider public debates on this issue. Of consideration may be the interface with members of the public

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[17] Tumbridge, James. (2024) Can you use AI in court cases? [Online] Available at: Can you use AI in court cases? : Keystone Law [Accessed February 21, 2025].

through single points of access, where calls could be recorded, summarised and transcribed. Currently, many services encourage website participants to interact with a virtual assistant, though this is normally in the context of a sales or customer service environment, rather than a social care setting. The replacement of human operators at contact points should be carefully considered. There is also potential for digital exclusion with members of the public who are less digitally competent.

Impacts on Employment

Several participants highlighted concerns that the introduction of Copilot could be seen as an opportunity to introduce job cuts in a time of budgetary constraint and cutback. There was concern that administrative functions may be reduced, resulting in potential redundancies and changes to conditions.

A particular concern of social workers was the potential that AI could lead to a deskilling of the role, or that it might impair judgement when taking decisions around the support provided to individuals under their care.

> 'I think it's too early to implement the use of AI and this is an ethical concern, which could pose a risk of deskilling and undermine the profession of Social Work'

Addressing ethical concerns

It was felt that the above concerns could be largely mitigated by ensuring careful handling and preparation for adoption. There was a call for some issues and guidance to be issued at a national level to provide clear information about legal implications.

Participants strongly advocated for an approach that ensures Copilot is used as a tool to support person-centred practice, and not as a replacement to jobs, though how jobs are defined may change. Messages should be reinforced by senior leadership, and practitioners should be encouraged to raise any concerns throughout implementation. Defining responsibility for AI generated records was also felt to be essential, making it clear that the practitioner should be ultimately responsible for the contents of reports produced, and their review before finalising.

Setting clear policies around governance and data security and learning from other technology projects such as the WCCIS successor and Connecting Care programme would assist in mitigating any risk of inappropriate use.

Another area highlighted by participants was the need to inform people accessing care and support and the public about how their information will be used – people should be given the option of opting out from being recorded during their interactions with social care. Draft notes and transcripts should be audited and destroyed in line with organisational and GDPR policies

Ensuring strong quality assurance - records should be clearly marked as being AI draft or checked by practitioner, to avoid confusion and the circulation of unchecked documents that have not met basic quality assurance requirements.

5. Resource / Capacity Requirements

Participants were asked to identify the essential resource and capacity requirements needed to support Copilot adoption, apart from IT infrastructure and cost of licenses (which are explored in section 3). Chart 4 illustrates findings - 93% of survey respondents felt that hands-on training with Copilot was a priority.

Chart 4: Survey Question: What types of training / support would you need? [Select as many as apply]
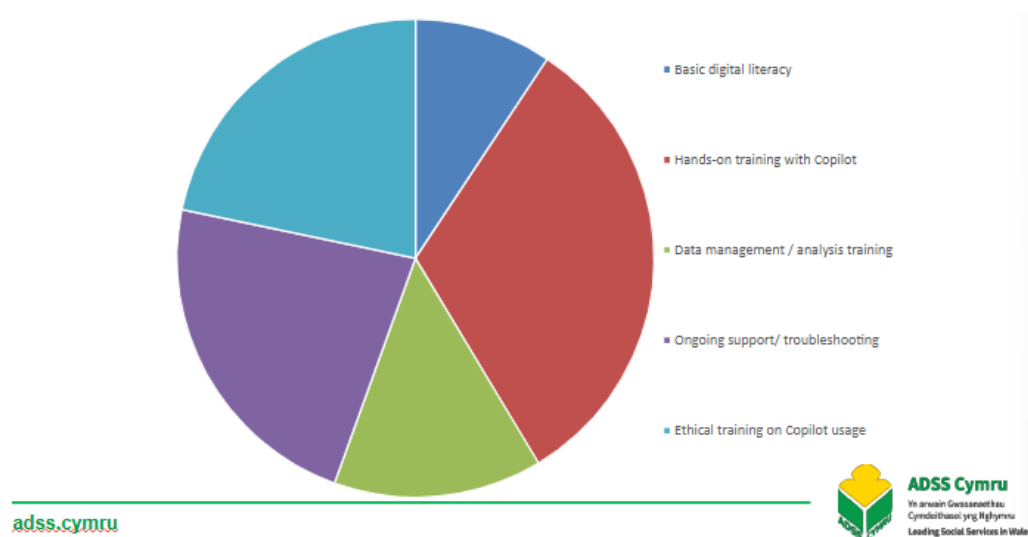
The other highest scoring types of support were access to a support team such as the Champions Network (73%) and regular refresher courses (70%). Fewer respondents felt the need for basic digital literacy training (27%) or data analysis training (41%), or for online forums (40%).

Training Resources

One of the themes that came from teams and professional groups was that Copilot would be used in a variety of ways, and that service areas will have differing needs in relation to training.

It was suggested for this reason that a careful assessment of service areas taking up the technology should be undertaken to inform training development, which could be offered for those with different levels of digital competency. Business support officers should be trained differently to front line social workers or senior management for example. Social Care Wales has developed a digital potential tool that supports social care providers to identify areas of development.

There was a strong preference for face-to-face training rather than e-learning, supported by experiences during Covid of introducing new ways of working, where online learning was felt to be less effective.

Of those actively using Copilot, there were some types of training activities that were felt to be particularly supportive, including doing live demonstrations to teams considering adoption, and having floor walkers to provide 1:1 support in live pilot areas. Facilitating short seminars to promote 'bite sized learning' was also effective for time-poor practitioners unable to commit to full days off the frontline.

There was also a suggestion that having some elements of training available nationally would support regions to focus on their local priorities and needs, thus reducing the capacity required to support widespread implementation. Other effective techniques to share learning included having Copilot as a standing item on agendas and incorporated into operational management meetings.

A big area of potential risk is if users are not aware of how to use Copilot effectively. This emphasises the need for effective training before Copilot is rolled out. As part of this project, a list of helpful tips for practitioners has been developed and these are contained in Appendix C.

The Champions Network participants expressed a willingness to consider train the trainer

approaches, to support spread and scale nationally. Some local authorities have begun to develop their own training materials that could be shared, such as an induction pack for new starters including digital literacy that covers basic digital skills and tools. One local authority has developed an AI toolkit portal, which includes a translation tool and other resources that staff can access. There was a suggestion that some elements be mandatory before being approved as a user, to safeguard compliance with appropriate guidelines and regulations.

There was also a suggestion of consolidating learning from areas already using Copilot into a Good Practice Guide, which could evolve as regions have more experience of using the technology in practice.

Templates, Use Cases and Prompts

Some local authorities have been developing templates and user cases to support implementation. One local authority has developed user cases around taking minutes, summarising documents, generating draft reports and using Copilot to generate Outlook emails. Another has developed three templates in adult and children's services for assessment and case recording that could be used with Copilot.

There was a suggestion that the development of an invest to save business case template would support regions to request funding for adoption.

As part of the activities of the Champions Network and the Practitioners Focus Group Sessions, a suite of prompts was developed to support appropriate use of Copilot. In addition, a helpful guide of top tips for developing prompts and using Copilot was also developed. These can be found in Appendices B and C. One big advantage of using these prompts is assurance that they are appropriate and have been tested.

The input from focus groups was invaluable in helping to understand the views of practitioners in relation to potential use cases. Participants expressed that managing information can at times feel overwhelming, with all activities, evidence and decision- making processes needing to be recorded and data entry duplicated across systems.

Pulling together resources such as reports and summaries is also challenging due to the sheer volume of information. Working at pace means that information must be assembled quickly to support functions like duty handover or managing in crisis situations.

Some managers reported that they already use Copilot for undertaking audit activity, finding it beneficial for synthesizing and analysing information, drawing out themes and wading through large data sets for reporting and whilst this is linked more to a managerial function, there is a use case to be made with this in mind.

During the sessions we were keen to manage expectations and stress that whilst there is not currently an interface between Copilot and local authority information management systems there is still an opportunity for using the tools to save time and help ease the pressure.

Based on the Slido responses and the issues raised during the discussions, the second session focused on solutions by way of live demonstrations of the following themes, to highlight how Copilot could support with some of the challenges presented. A summary of the themes can be found below:

- **Summarising emails** – using Outlook in a more functional and efficient way to address the issue of volume and efficient filtering of content.

- **Preparing Visit Notes** – using Copilot to generate case notes/visits from bullet points (taking the example of carrying out several visits and having the contemporaneous rough

notes made between visits); or from recorded notes and then using Copilot to structure them and put some 'meat on the bones.

- **Summarising Public Protection Notices** – including chronologically itemising activities and condensing information

- **Preparing Assessments** – pulling together information from several sources

- **Meeting Recap** – using the functionality of teams to focus in on specific parts of a discussion; summarise; or to receive an overview if you weren't in attendance.

- **Preparing for Panel** – drawing on several sources of information to collate a report.

The digital tool, Slido was also used with focus group participants to encourage interactive discussions which informed the overall findings on workforce readiness as well as supporting the development of templates and use cases to guide practice.

One of the key outputs from the project was the develop of specific prompts, which could be used by practitioners who choose to use Copilot to support their area of work. These prompts are helpful examples of how to maximise the effectiveness of using Copilot in one of the three areas of social care that the project has explored. A list of the prompts together with an explanation of their application can be found in Appendix B, together with a link to a short video which explains how these can be used in practice.

The Champions Network

There was a strong sense that bringing local authorities together in the form of the Champion's Network was a very welcome and helpful step towards shared understanding of the opportunities presented by CoPilot, as well as an opportunity to work together to consider once for Wales solutions. The network also offered a chance to learn from organisations that are further ahead in considering Microsoft Copilot and sharing ideas about overcoming barriers.

'Harness the enthusiasm of interested staff and get them involved early to win hearts and minds'

Following the four sessions undertaken during this review, a brief survey was circulated to gauge the interest in the forum continuing beyond the life of this project.

Chart 5: Champions Network Survey – Experience of the Champions Network
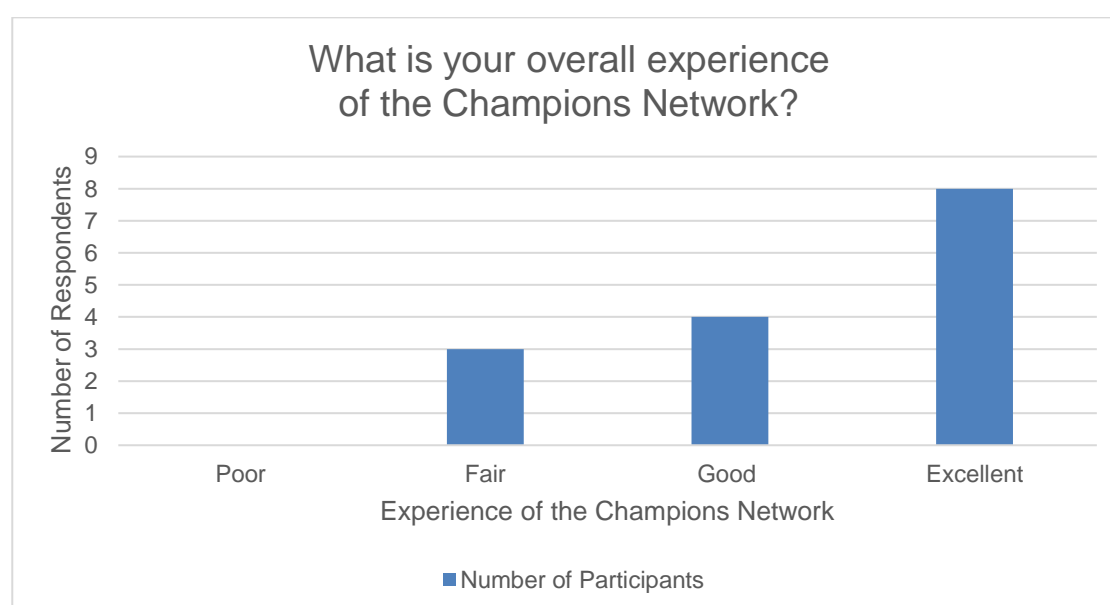
Most participants responding to the survey reported a good or excellent experience of the Champion's Network.

Chart 6: Champions Network Survey – Interest in Future Network Continuation

The Copilot Champions Network should continue
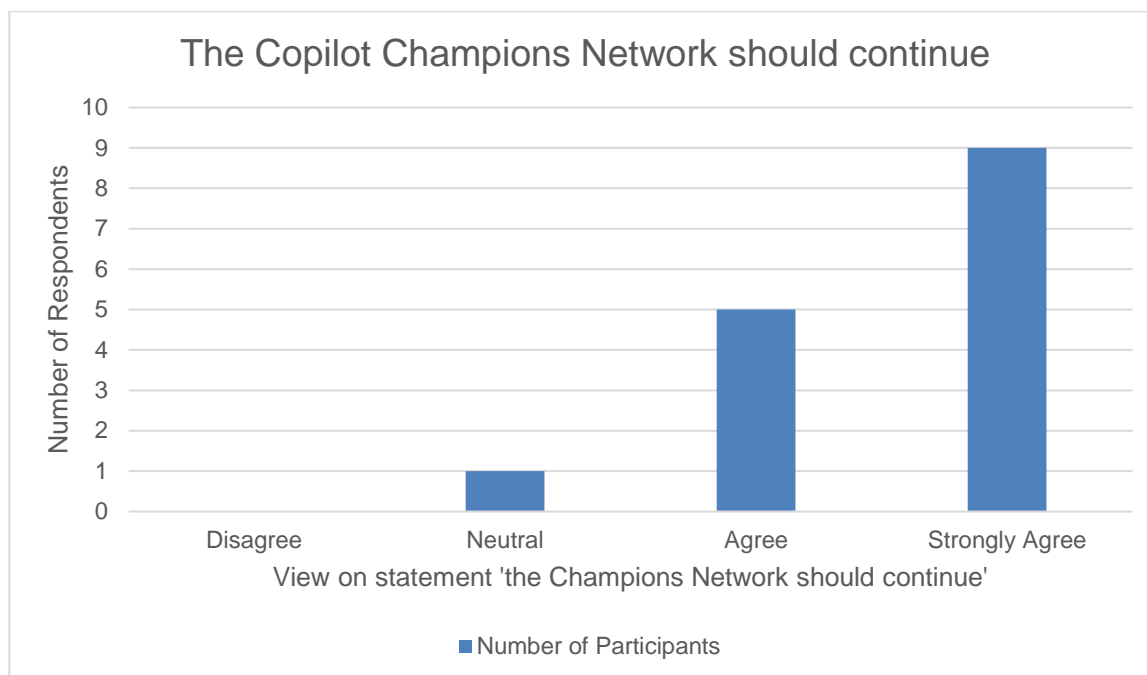
Most participants responding to the survey agreed or strongly agreed that the network should continue beyond the life of the project.

Below is a selection of quotes from participants:

'The network has been a great opportunity to engage the wider workforce around AI tools and start the conversation - the limitation of this, being that each Local Authority is at a different stage in their journey which makes it difficult to measure the impact that the network has had on our Local Authority.'

'The benefit of knowledge, experience and journey of other Local Authorities being shared is vital.'

'The network is useful for overview of AI on a more national level and to share updates and developments. Undoubtedly, there will be issues in the rollout and so discussion and brainstorming with other authorities who are at different stages in the rollout would be very useful.'

More detail on the questions asked at the Champions Network meetings can be found in Appendix A.

Ongoing support throughout implementation

Following initial training, survey respondents listed which types of ongoing support would be most beneficial.

These resources included:

> 73% Access to a support team such as the champions' network
> 70% Regular refresher courses
> 47% peer support groups
> 40% Online forums or communities
> 5% other

One of the most frequently mentioned resources that would be helpful was access to ongoing support through floor walkers and peer support groups. One local authority has an agile mobile working team' which can respond to any IT needs as well as offering technical support to practitioners.

A few participants advocated for consideration of external support, bringing in expertise on change management or technology to support roll out where capacity in house was limited. Of those local authorities identifying as being closer or in the 'green' readiness level, there was input from employees with specific skills such as human resources, Data Protection, digital and business analyst support.

> External support would be needed as the team is currently dedicated to another project. Collaboration with corporate IT or consultants might be necessary.

Finally, there was acknowledgement that there would need to be an approach to adoption which includes regular opportunities to review and adapt throughout the implementation period. This flexibility was felt to be one of the success factors for local authorities that had had more success in the past with technological transformation activities.

6. Policy Review and Compliance

Throughout the readiness assessment period, the area that local authorities expressed feeling least confident was around the governance framework to underpin the use of Copilot. Most regions had not yet developed policies to align with appropriate legislation and felt unsure about the best way to proceed with this. There were some good examples of where progress has been made – one local authority has developed an acceptable use policy.

Most participants expressed that they would welcome national guidance and support around the development of AI policies. There were suggestions of aligning AI policies to wider digital strategies, GDPR and consent legislation, as well as a review of guidelines around auditing, archiving files and storing data.

Local authorities identified that establishing processes that are easy to learn, and follow is a very important factor in their decision making about when to proceed with adoption.

> There is a need to set out clear parameters, expectations, roles and responsibilities.

Another area that organisations felt very important was to emphasise the ownership of records as being the practitioner's responsibility, with a requirement that AI generated content be quality assured by a person before being used. As explained by one participant,

> Safeguards need to be built into the quality framework to ensure staff review and verify AI-generated documents. For instance, the team needs to establish procedures to ensure that staff have reviewed and approved AI-generated documents before they are finalised

It was noted that some of the changes that would come with AI represent a cultural shift, just as the move from paper-based records to computers was. For example, recording calls may challenge views around privacy and ways of working that traditionally came from in person discussions.

Workforce Readiness Assessments Conclusions

There is significant potential for AI to support practitioners in adult social care to carry out their roles more effectively, and to reduce the administrative burden of daily working practices. This will have the benefit of maximising the time available for person-centred care and human interaction, and ultimately better outcomes and quality of experience for people accessing support. The wider political landscape is embracing technology and actively encouraging innovation and adoption, both at UK and Welsh Government levels. While some sectors have forged ahead, social care has so far been more cautious. Welsh local authorities may wish to look at other public services to understand any governance architecture in place while developing their own, and to consider once for Wales approaches.

Our readiness assessments of Welsh local authorities highlighted a cautious but mostly welcoming approach to the idea of widespread adoption of Microsoft Copilot. Most local authorities feel that the workforce is in a place of readiness for change, but with the need of additional support and resources to achieve success. Digital assessments highlight that the basic IT infrastructure is in place to facilitate adoption. However, there will need to be additional readiness activities undertaken by digital and corporate teams in some regions to ensure the security and safety of using the technology, and to maximise the potential. With inevitable regional variation and some frontrunners already well into their journey of adopting the technology, there is significant potential to learn from early pilots and activities and to consider once for Wales approaches that will support moving forward at pace. Key success factors identified to facilitate adoption included the support of senior management colleagues and involvement of leads from Human Resources, digital and social care departments from the outset. The involvement of employees in helping to shape activity and the formation of working groups, alongside assigned champions was also a strong factor in taking forward a unified approach and ensuring strong ongoing support across organisational boundaries.

We have learned that most practitioners and managers feel at ease with using digital tools in daily working. However, fewer are familiar with MS Copilot, and some have reservations about it and would like to know more. Of those already using Copilot, they express positive experience and impacts, though it is still too early to fully evaluation how it is affecting teams in pilot areas. There was also a clear view that different types of practitioners and teams will have different needs when it comes to training and implementation. For these reasons, there will be a need for local authorities both to spread awareness about the technology, as well as facilitating dialogue with specific areas of practice to better understand their potential.

Ethical considerations include the need to ensure that the person-centred relationship remains central to interactions with people accessing care and support, as per the code of professional practice for social care. At no time should AI be seen as a replacement to this contact. There is a need to consider consent issues, such as when to inform people of the use of AI, and when informed consent is needed, as well as how to manage best interests in situations where the person lacks the mental capacity to give permission for AI usage.

There was general agreement that the practitioner must retain responsibility for records relating to their caseload, and must quality assure all content, rather than relying on AI to produce accurate records. A process will need to be put in place to clearly identify those documents that remain AI drafts and those that have been signed off as appropriate. Additionally, there was general agreement that Copilot should not replace jobs but rather be seen as a tool to support people in role.

Potential challenges include the need for sufficient funding to obtain licenses, and to evidence the cost savings of investment to demonstrate value for money.

Of particular concern were the relatively underdeveloped Welsh language capabilities due to large language models not yet being sophisticated enough to produce high quality transcription and content. One local authority has been able to implement a work around via using their Welsh translation team to quality assure materials produced by Copilot immediately after creation, thus avoiding any delays to using materials, but also having shortened timescales when compared to business as usual, because the outline work was done by the technology.

Another area where local authorities currently lack confidence is around the development of appropriate policies and governance arrangements. As the legislative framework evolves around AI usage, organisations will need to remain current with developments and ensure alignment with and regulations such as GDPR and other UK laws that emerge. There was a specific ask that local authorities be supported by national bodies to navigate this evolving landscape and to ensure compliance and appropriate usage. Some local authorities have already undertaken some activities in this area and early learning should be shared with others to support widespread adoption.

In some local authorities, IT infrastructure will require additional resource and investment to ensure appropriate usage of Copilot, and more information is needed about the interface between Copilot and existing case management systems and software applications.

A note of caution regarding the need for appropriate training – it is certainly possible to use technology like Copilot incorrectly, and thus to produce potential data security risks inadvertently. It is important that those who will be using the technology receive full and appropriate training to ensure that these risks are minimised, alongside background activities that are taken by digital teams to safeguard records and information. The development of prompts is one way to ensure that Copilot is being used as effectively as possible. Local authorities should be guided by their digital readiness assessments to support robust risk management in this area, and there should be consideration given to regional or national basic training that would assist in safeguarding usage.

Whilst there was largely agreement amongst participants that rolling out Copilot would improve working conditions over time, Local authorities expressed concern about the upfront and ongoing resource capacity required to support transformation activities at a time of competing challenges – and the potential impacts on services already under strain. In some cases, it was felt that bringing in external expertise around technological transformation and change management might be prudent to ensure adequate dedicated resource to take adoption forward.

Lessons learned from previous digital projects included the need for in person face to face training, as well as ample opportunities to access support, such as floor walkers and 'sandbox' versions that enable safe practice usage. While most staff feel they have basic digital literacy, there will be variation in skills and needs which need to be accounted for.

The ongoing support of a Champion's Network would ensure that opportunities for shared approaches are maximised, and that learning as well as the development of resources such as the prompts and user cases can be shared across Wales. This will strengthen implementation and reduce duplication. The network will also enable more in-depth exploration of key ethical considerations and problem solving as work matures.

Digital Readiness Assessment

Each of the 22 local authorities was offered the opportunity to have a digital assessment by Stable. The process involved testing readiness in two domains by using Microsoft 'best practice' standards to assess the security and level of functioning that could be achieved with Copilot.

Fifteen local authorities met with Stable engineers to undertake the checks and received a bespoke local report and set of recommendations. Seven other local authorities were not able to provide data for the assessment in the timeframes for the project or chose not to participate in the assessments. Two areas were assessed – the Copilot software itself and how it had been configured, and the wider Microsoft 365 environment that it interacts with, including SharePoint settings.

Stable Microsoft 365 Copilot Readiness Health check is derived from a set of Microsoft best practice recommendations for configuring Microsoft 365 Copilot in a secure and compliant way. Organisations can determine, based on their needs, the most applicable 'path' for Copilot adoption. This in turn asserts the tools and services that need to be in place to support that path.

A successful adoption of Copilot relies on the safeguard of a healthy information security landscape.

The broad Microsoft 365 Health Check (derived from the NCSC/Microsoft secure configuration alignment guidance) conducted primarily focuses on Microsoft tenant security in general. This is why there is a significant emphasis on security measures and recommendations.

When considering Copilot readiness, a healthy environment for Copilot is indeed a healthily managed information space. This is why there is a strong intersection between the two. The benefits to social care aspects from the health check are associated with the local authorities overall Microsoft 365 configuration, combined with how the information therein is maintained. This context for the AI to function within is curated by the local authority's information management processes that aim to eliminate issues with data management systems.

Overall Digital Readiness

The technical readiness activities are grouped into three categories by Microsoft and are:

Baseline: This level ensures that the fundamental requirements are met. It includes basic configurations and settings that allow Copilot to function within an organisation. This might involve initial setup, basic user training, and ensuring that essential integrations are in place.

Core: At this level, the organisation has moved beyond the basics and has implemented more advanced features and optimisations. This includes enhanced security measures, more comprehensive user training programs, and better integration with other tools and workflows.

Best-in-Class: This represents the highest level of readiness. Organisations at this level have fully optimised their use of Copilot, leveraging all available features and integrations to maximise productivity and efficiency. This includes advanced analytics, custom configurations, and continuous improvement processes to ensure the best possible outcomes.

Each organisation will need to make decisions about which level they wish to aspire to. It is possible to operate Copilot safely and effectively without achieving 'best in class'.

More detail about each of the levels of readiness is provided throughout the assessment to assist in understanding what is covered in each category.

Different Types of Licenses

There are two types of licences that organisations can purchase to support the different features of Copilot; these are Microsoft 365 E3 and Microsoft 365 E5. For baseline and most core standards to be met, a E3 licence is sufficient, though there may be more work associated with preparing IT systems with standard licenses. To achieve best in class, users must obtain E5 level licences. Level E5 licenses have more functions and automation, which makes preparatory work more efficient. However, they are more costly, and local authorities will need to take a decision in the first instance to determine which level of license is sufficient to meet their needs. Microsoft 365 Copilot itself is around £24 per user per month. A table illustrating the overall features of E3 vs E5 licences can be found in Appendix F. It should be noted that all users with an E3 license have access to a free to use version of Copilot.

Another consideration within the wider environment that Copilot operates is which level of SharePoint to purchase – the options include Standard, which is included within Microsoft 365, and Premium, at an additional cost per user per month. Having a SharePoint Advanced Management license is a requirement to meet all activities/controls in the Core and Best-in-class levels of functioning. Something to bear in mind is that for SharePoint, every single user would need a license, which potentially results in a large cost, while E3/E5 licenses can be purchased in small numbers for more advanced functions. No local authorities currently have SharePoint Advanced Management in place.

Table 3: Licensing required for maximum utilisation for each path

Path	License	SharePoint Advanced Management
Baseline	E3	No
Core	E3	yes
Best-in-class	E5	yes

Table 4 below shows that half of local authorities assessed have existing E3 level licenses, while half have E5 level licenses. In addition, the Microsoft 365 system 'secure score' measure is introduced which is a system generated value for indicating at a glance how secure the Microsoft 365 system is.

Table 4: Participating local authority current license levels and Secure Score at assessment

Row Labels	Count of local authority	Default Secure Score	Average local authority Secure Score
E3	8	38%	44%
E5	8	52%	62%
Grand Total	**16**		**51%**

Each local authority will require either an E3 or E5 license to be able to use Copilot – the fifteen local authorities who completed an assessment already have this in place. One thing to consider is that every user of Copilot does not require the highest level of license if wishing to activate the features. It is possible to purchase some license for the technical / administrative users to undertake the preparatory work and to monitor usage, while basic frontline users (such as social

workers) would not require the higher (and more costly) level of license. This is an important factor when taking decisions about any software purchase.

Overview of Local Authorities level of readiness

Chart 7 illustrates how many of the controls have been put in place at each of the levels of readiness, indicated using a red, amber, green (RAG) status. The seven columns of black dots represent missing information – those local authorities that did not complete the digital readiness assessments. Each local authority will have activated some features at the different levels of readiness (for example, one may have activated all 'baseline' functions (green) and a few of the 'core functions' (amber), but none of the best-in-class features (red). Each column of dots represents a local authority. Overall, we can see that most local authorities that undertook assessments with Stable engineers have already done at least some preparations to support using Copilot.

Chart 7: Local Authority Readiness at each level
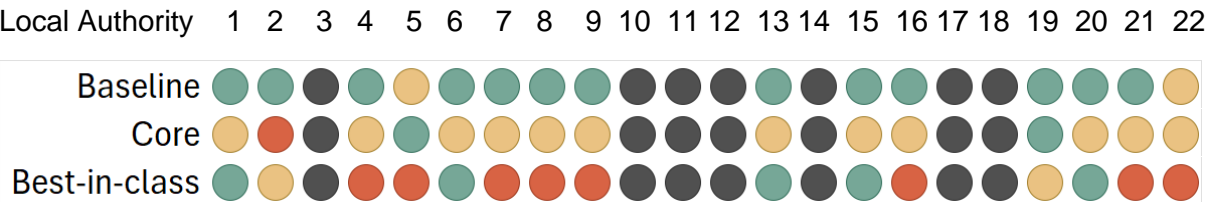
Baseline Digital Readiness

During the assessment, each local authority was assigned a score to show their readiness in each of the domains. Chart 8 below illustrates actual and potential scores. On average, local authorities had achieved a score of 54 against a potential of 92 in the baseline assessment, using the licenses that they already have in place.

Chart 8: Scoring and Improvement Opportunity- Baseline digital readiness
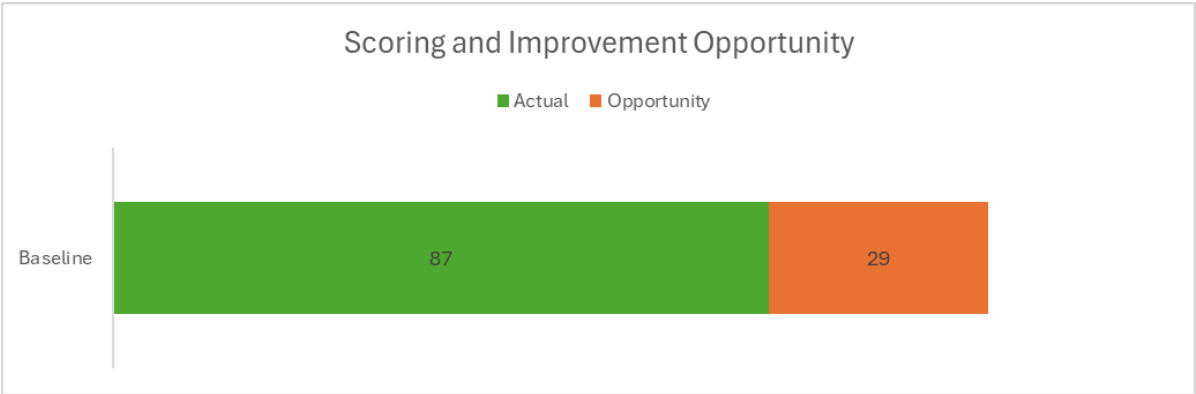
The baseline goal for Copilot is to ensure that all local authorities have the foundational infrastructure and technical controls in place to effectively implement and utilise Copilot's capabilities.

- Most local authorities have access to all the technical controls that have a bearing on Copilot effectiveness.

- Some local authorities are using all the means they are entitled to be prepared.

Core Digital Readiness

This path builds on the baseline by introducing additional security and governance practices.

As illustrated in Chart 9 below:

- Local authorities with the highest licensing capabilities (E5) are only managing to make use of 50% of capabilities

- No local authorities have invested in SharePoint Advanced Management

- Several local authorities with only E3 are utilising more product capabilities than some with E5.

Chart 9: Scoring and Improvement Opportunity- Baseline digital readiness
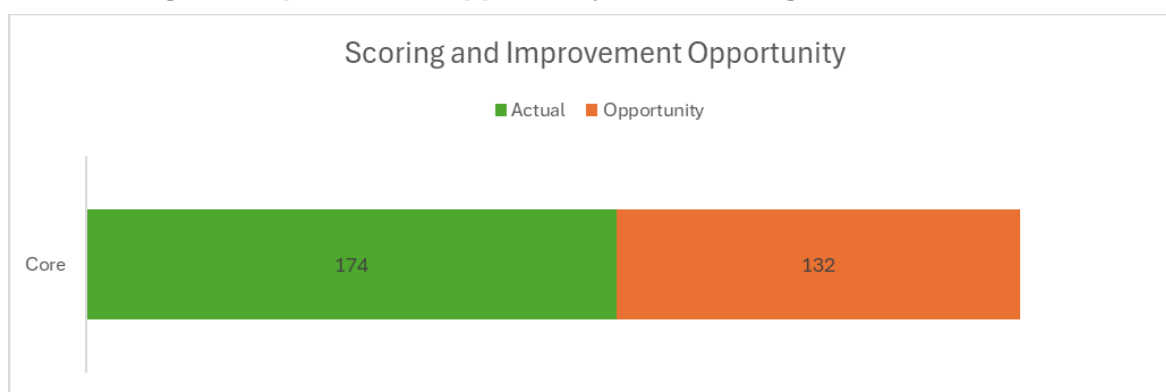
Best-in-Class

Best-in-class is the highest level of technical readiness. It includes comprehensive security and governance measures, such as advanced threat protection, continuous monitoring, and proactive risk management. Chart 10 illustrates that:

- Nearly all local authorities with E5 have scored some in this route

- Some local authorities with only E3 have scored in this region

An area that needs to be explored is which of the controls must be in place to achieve acceptable levels of data security and functioning for adult social care in Wales. This was also a key finding of the workplace readiness assessments, to ensure alignment with relevant policy and legislation as well as setting out acceptable use standards and expectations.

Chart 10: Scoring and Improvement Opportunity- Best-in-class digital readiness
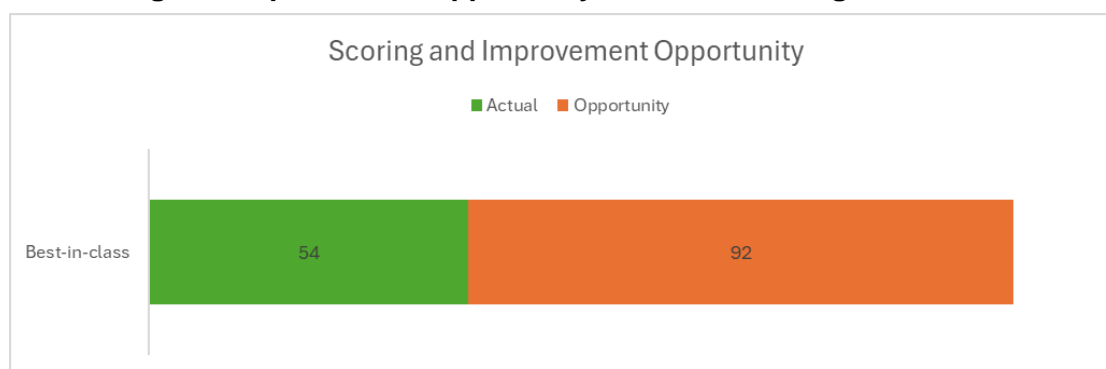
Technical Control Utilisation

The overall utilisation of the pertinent controls available in the Microsoft 365 platform for efficient adoption and managing the information risks was assessed.

- **Sharing**: Controls that limit content sharing are essential for ensuring that only authorised users can access certain data, enhancing Copilot readiness.

- **Sensitivity Labelling**: Labelling sensitive folders and files helps manage permissions and protects data, crucial for effective Copilot deployment.

- **Retention**: Implementing retention policies ensures that important records are preserved appropriately, supporting data accuracy with Copilot.

- **Platform**: Fundamental data connections, software currency, access controls.

- **Restrictive Search**: Utilising search index restrictions safeguards sensitive information from unauthorised searches, an important Copilot readiness measure.

- **Governance**: Comprehensive security and governance practices, such as advanced threat protection and continuous monitoring, are critical to maintaining Copilot readiness.

- **Data Loss Prevention (DLP)**: DLP measures prevent unauthorised sharing of sensitive information, which is essential for Copilot's secure operation.

- **Analytics**: Leveraging analytics allows for continuous assessment and improvement of security measures, ensuring Copilot remains effective and secure.

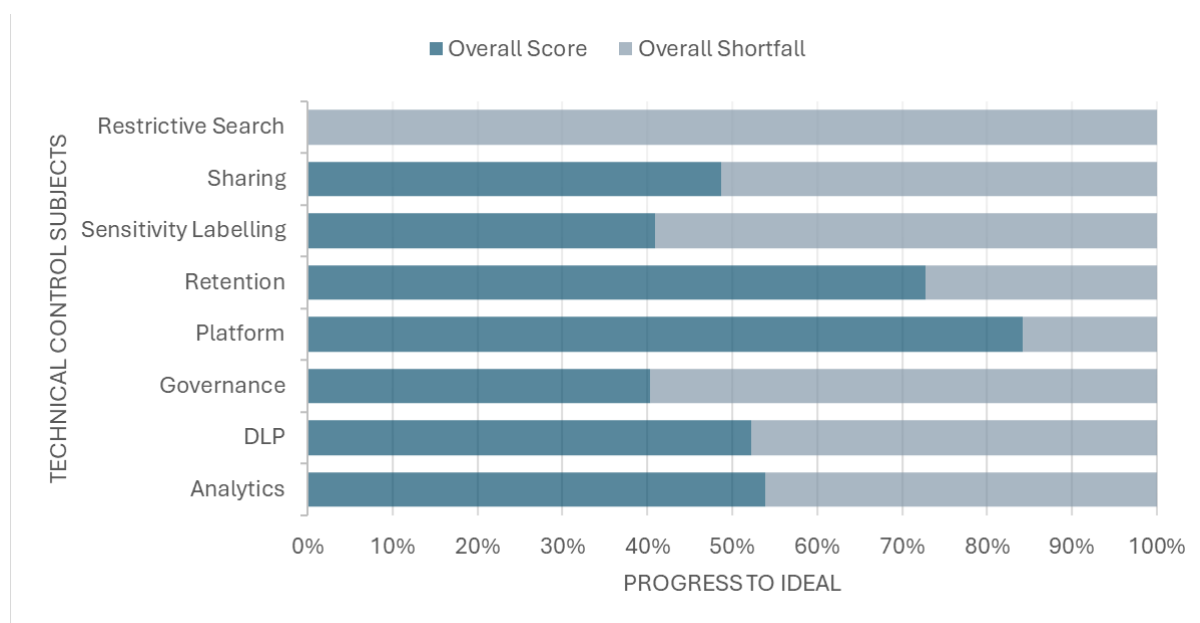**Chart 11: Technical Control Utilisation for each subject scoring**

Chart 11 illustrates that approximately half of the controls that could be used by local authorities are currently being used.

As noted in the previous section, further work will need to be done to assess what an 'acceptable' level of using the controls is for Wales adult social care.

Stable has identified some areas where local authorities could potentially improve safeguards going forwards. Each of the local authorities that chose to participate has received a detailed report on the recommendations for their organisation, some of the general trends are described in the following section.

Potential risks and mitigations

Sharing

Of the local authorities utilising SharePoint, most show attention to a need for some sites to override the organisation sharing settings and customise according to the site (team). This is a good attention to detail. None, however, are using the 'owner only' sharing, for which sites of high sensitivity and therefore risk, may warrant. By putting this into place, users will only be able to share information with those who also have permission to access the files.

Local authorities should also consider the settings around how files can be shared externally – various settings can be put in place to restrict who can receive local authority files.

SharePoint Restrictive Search

One area that is likely to be important to safeguard sensitive information in adult social care is to ensure that files are protected, and that only users that should have access to them do. It was also identified by local authorities that they only wish Copilot to be pulling information from the files that are ringfenced as appropriate to be using. That means that folders should be labelled – a task that requires going through the system to mark each folder as sensitive or accessible based on the contents. That process can take some work and resource – until that work takes place, a local authority can make use of a function that controls the SharePoint systems' 'restrictive search' function. If a site with sensitive information in it has not been inspected and controls in categories such as, sharing have been considered and applied, then there is a high risk of inappropriate consumption of that information from the AI.

Each local authority can undertake a site-by-site risk assessment. On first pass through the system then searching if any site should be blacklisted. Various controls mitigating the risk of information misuse can be applied to a site, from sharing permissions to sensitivity labels and policies. Once a site has these controls in place (if applicable), then search can be allowed on the site and Copilot functions can work. Such a risk assessment is considered good practice as a general data protection measure in public services, and it is recommended that it be done regardless of decisions around Copilot adoption.

No local authority has currently activated the SharePoint 'Restrictive search' feature, which allows users to switch off the SharePoint search engine – this stops Copilot from searching too widely, until the local authority has done their work to label files or apply other controls. It is easily toggled to on or off. Only systems for which there is one Copilot user can make use of this.

It can be seen from the diagram above that none of the local authorities in Wales who participated have currently made use of the SharePoint Restrictive search function. It is true that this would be the case if every site had been risk assessed, and appropriate measure applied to control any inherent risk. This is not the case, and sites that are high risk would be expected to have this restriction in place.

Sensitivity Labelling

There is a varied utilisation of this fundamental control in the local authorities, from nothing to a fully mature label taxonomy. Several have made steps into the use of labels but often stopped there. There is rare evidence of adaptive/automatic labelling experiments, which shows promise that awareness is being spearheaded in some local authority ICT departments. The development

of a standardised label taxonomy could be derived from those local authorities leading the way in this area.

Once for Wales work in this area would have two advantages, including saving time and allowing for consistency across local authorities in terms of how they define security settings. It would also mean that files shared internally and outside of the local authority are appropriately identified as confidential or encrypted based on the contents.

Retention
Of the compliance related subjects, retention is the most well developed. E5 brings in Teams channel and chat only control by default, so is easy to adopt, but this subject has been in the minds of Exchange administrators for many years, so understanding in the digital teams is likely mature. Making use of the success of local authorities doing it well and multiplying that out to other local authorities may well be worth considering.

Platform
Most local authorities score highly in this domain, which is the basic set of controls to achieve the baseline path. This is positive and ensures good basic functionality of Copilot in several areas such as Office Desktop app maintenance; general endpoint device management and compliance; user identity and security; plus, organisation structure.

Governance
There are two areas assessed to ensure appropriate information governance:

Communication Compliance works with Copilot to ensure that sensitive information is appropriately monitored and managed, safeguarding against unauthorised access and misuse.

eDiscovery, paired with Copilot, ensures that sensitive information is meticulously tracked, managed, and retrieved, preventing unauthorised access and misuse.

Scoring in this category has awarded points to any local authority making any use of these functions, however no local authority has yet made the connection between Copilot use and these tools.

Data Loss Prevention (DLP)
There was wide variation in the use of data loss prevention tools across local authorities. Some scored quite highly in this area and had strongly applied the controls, while others were still at exploratory stage testing what they might do. There is potential for leading local authorities to share learning with those that are not as advanced, to support more consistency in application and stronger data loss prevention generally in local authorities.

Analytics
Analytics help to support audit functions, like locating inactive sites, monitoring changes, producing management reports and monitoring potential oversharing. They are a key tool to support strong data governance. Local authorities scored poorly in this domain, with little evidence to support the use of analytics control in SharePoint. One local authority has made use of a third-party tool to support analytics. Most of these tools are accessed via the SharePoint Advanced Management license, which explains the low uptake to date.

None of the local authorities are currently using the function of 'administrative audit'. This function is a toggle switch that lets local authorities track how files are shared, and to be alerted to any inappropriate usage.

Chart 12 sets out how local authorities are using the functions described above, with RAG rated performance in each subject. The overall score represents the national position -dark green area is inaccessible using existing license capabilities.

Chart 12: Technical Control Utilisation Scoring (national assessment trend)
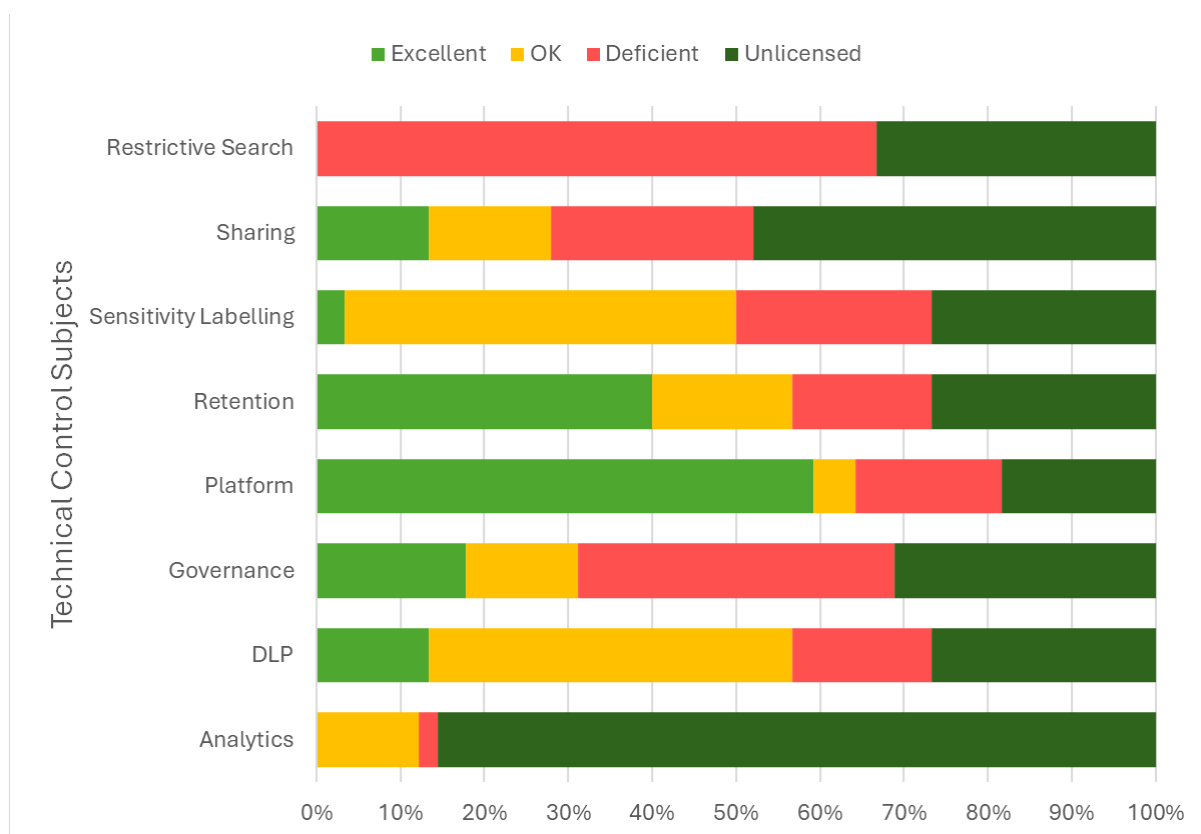
Digital Readiness Assessments Conclusions

In summary, fifteen local authorities participated in the digital readiness assessment process directly, while the others were not able to complete the assessment in the timeframe or chose not to participate. There were differences in attitudes and behaviours around digital assessment – some local authorities were very open to the idea of the work being undertaken, while others were more inclined to rely on their own resources to do so, and less willing to share information. The fifteen local authorities who took part have at least an E3 license in place which allows them to support basic functions that support Microsoft Copilot, and all have Microsoft 365.

None of these local authorities currently have the SharePoint Advanced Management license, which means there are limits to how they can monitor Copilot's usage. There will need to be guidance around what an acceptable level of compliance is to ensure basic data protection, governance and security. Each local authority should undertake a risk assessment across their SharePoint folders and should put restrictions in place that limit inappropriate usage and sharing of files, whether or not they choose to adopt Copilot in daily working.

A phased approach to implementation is advocated. While local authorities undertake risk assessments and progress with readiness activities 'behind the scenes' to prepare their networks for Copilot, expert user groups can support sharing learning from local authorities that are further ahead to produce once for Wales approaches and guidance. Local authorities need only purchase a couple of higher end licenses to be able to do this work. Future users of the system can also receive the appropriate training and support to familiarise themselves with the technology ahead of wider roll out. Once assurance is achieved that appropriate controls are in place, wider adoption of licenses for those using Copilot in daily working (frontline practitioners) can be rolled out across adult social care. Careful attention will need to be paid to ensuring that practitioners have clear guidance and tools as well as ongoing support to use the programme appropriately. Local

authorities will need to ensure that they have basic monitoring and audit arrangements in place to ensure appropriate usage of information and may wish to set parameters around this – for example the establishment of an annual scan to monitor policy compliance. This review has started the process of producing resources that support adoption, including prompts (Appendix B) and 'Top Tips (Appendix C), along with technical and general recommendations for local authorities and national bodies to consider.

The reality is that the adoption of Copilot and work needed to prepare the digital environment for adoption will not immediately save costs. However, there will be immediate gains supporting improved productivity and quality. The potential over the longer term for Copilot and AI generally to achieve significant cost savings and improved outcomes for service users is also present, once everyday users begin to put Copilot into practice.

There will need to be a considered approach to how local authorities choose to move forward with this emerging technology in the coming months, to support adult social care and other areas of public service.

The UK Government has just published the AI Playbook[18]. This guide supports guidance on using AI safely, effectively and securely in the context of public services. Three key messages in this resource include firstly, that AI should be used where it adds real value, rather than just for the sake of it. Secondly, that human oversight is essential to ensure that AI supports rather than replaces decision making, and thirdly that public sector teams should collaborate openly, sharing learning and best practices. These messages echo the findings of early adopters of Copilot, and the guide provides a useful resource for local authorities to use as they engage with AI activities.

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[18] UK Government. (2025) Guidance: AI Playbook for the UK Government. [Online] Available at: AI Playbook for the UK Government - GOV.UK [Accessed March 7, 2025].

Recommendations

The following set of recommendations has been developed based on the findings of this work:

General

1. It is recommended that local authorities adopting Copilot in adult social care use a phased approach to implementation, establishing clear delivery plans, risk registers and project controls to support adoption. Dedicated resource should be in place to support this.

For National Bodies

It is recommended that:

2. The workforce Champions Network, established at the start of the project, continue meeting to support learning and shared approaches to adoption;

3. The existing AI subgroup of the Digital Advisory Group supports shared digital learning and national approaches to adoption, as well as once for Wales labelling taxonomy;

4. National bodies, such as the Welsh Government AI Commission for Health and Social Care support local authorities with legal advice and national guidance and that once for Wales training approaches are explored within the networks to support implementation;

5. Once for Wales guidance be produced to support local authorities in taking decisions about which digital controls must be activated to achieve acceptable use of Copilot. This will require input from strategic, IT and HR colleagues, and will involve consideration of UK and Welsh guidance already in place;

6. Opportunities for funding licenses at scale be explored, and that the evidence base to support a once for Wales business case is developed;

7. Improvements to large language models supporting Welsh translation technology are advocated with the Welsh Government and Microsoft, to ensure continuous development of Welsh language capabilities.

For Local Authorities

It is recommended that local authorities:

8. Use their digital readiness assessments and the Social Care Wales digital readiness tool to support activities that prepare the digital network for Copilot adoption;

9. Ensure prompts and guidance on safe usage 'top tips' are followed by everyday users, to ensure appropriate engagement with Copilot, and to minimise risk of data security concerns;

10. Obtain a small number of higher-level licenses to support readiness activities that prepare networks for adoption. This will result in cost savings and maximise functionality ahead of wider rollout to the everyday user, who can operate on lower-level licences;

11. Further investigate the potential integration of Microsoft 365 Copilot with existing software and case management systems;

12. Consider an annual re-scan to monitor progress towards adoption of Copilot;

13. Ensure the strong and visible support of senior leadership, and that they involve practitioners

and managers in the roll out of Copilot;

14. Identify opportunities for ongoing support and engagement for users of Copilot in daily practice.

Technical Digital Recommendations

It is recommended that local authorities:

15. That have not already done so should move from on-premises repositories to SharePoint;

16. Develop a once for Wales approach to labelling, learning from local authorities that are further ahead to develop a taxonomy that can be used across local authorities. This could be facilitated by the DAG AI subgroup, and should consider sensitivity labelling, data loss prevention tags and retention of files;

17. Explore the potential to improve digital governance using controls that support safer monitoring and management of sensitive information, and that strengthen data loss prevention.

For 'Core' Functions, it is recommended that local authorities:

18. Utilise the 'administrative audit' function to monitor data protection, and to consider whether analytics functions are needed to deliver appropriate governance;

19. Ensure that Office desktop applications are kept updated to ensure that latest features can be accessed;

20. Enable the SharePoint restrictive search function until they have been able to establish their labelling, to allow only high usage, low risk sites;

21. Undertake a SharePoint Risk assessment, with an inventory and mapping exercise for each site. This will require resource to support but will ensure appropriate usage;

22. Pursue compliance with the device management functions, which ensure phones, laptops and other devices are secure and that settings around acceptable risk are defined;

23. Set default sharing settings to 'view' rather than 'edit' which limits who can alter files, and that expiration standards are agreed and applied to ensure shared links are only accessible as required;

24. Establish governance practices such as regular eDiscovery scans and monitoring, to ensure that AI systems are being used appropriately and to monitor cyber security.

For 'Best-in-Class' Functions (for local authorities that have E5 licences) it is recommended that:

25. Risk-based dynamic settings be used, to set up more advanced monitoring for devices and users of 365;

26. Communication compliance settings be configured to support responsible AI use, analysing Copilot interactions on an ongoing basis;

27. Automatic functions like labelling, data loss prevention and retention be put in place, to achieve greater efficiency.

Appendix A: Champions Network – Terms of Reference and Evaluation Questions

1. Purpose

The Champions' Network is established to support the assessment of workforce readiness across all 22 local authorities in Wales in relation to potentially implementing Microsoft Copilot to enhance statutory social care assessment and care management processes. The project will look at three areas 1] First point of contact; 2] Carrying out assessment for care and support and 3] Review of Assessments.

In addition, the network will collaborate on developing Adult Social Care, specific prompts designed to maximise Copilot's efficiency, speed, and impact within the context of social care.

2. Scope of Activities

The Champions Network will focus on the following key activities related to workforce readiness and language prompt development:

Workforce Readiness Assessment:
- Collect feedback on current challenges, the levels of comfort and readiness for adopting Microsoft Copilot within social care processes.

- Work collaboratively with the project team to identify the necessary skills / training and resources to support workforce readiness.

Change Management and Communication:
- Promote the goals and benefits of Copilot building enthusiasm and buy-in among adult social services teams.

- Assist in developing change management strategies, including clear communication plans, stakeholder engagement, and strategies to address resistance.

Development of Social Care-Specific Prompts:
- To support the development of a set of tailored Adult Social Care prompts that will optimise the use of Copilot across all local authorities.

- Gather feedback from social care teams on the prompts' effectiveness and make adjustments as needed to support accurate and efficient Copilot responses.

Feedback and Reporting:
- Collect feedback from colleagues on the workforce readiness assessment.

- Provide regular updates to the project team on local progress, challenges, and recommendations for enhancing workforce readiness.

3. Membership

Each Local Authority will nominate one Champion to represent their Local Authority in the network. Champions should ideally have:

- Knowledge and understanding of the delivery of statutory care and support and care management processes within Adults Social Work Teams

- Knowledge of the social care workforce, including existing skills and potential future skills and needs.

- An understanding of change management in a social care context.

- Strong communication skills to effectively liaise between the project team and colleagues within their region.

- A proactive approach to digital transformation and an openness to introducing AI-based tools in social care processes.

4. Roles and Responsibilities

Champions Network Members:

- **Advocate for Workforce Readiness**: Act as advocates for workforce readiness, ensuring staff are considering how they could integrate Copilot into their workflows.

- **Assess and Report on Readiness**: Collect and share relevant information on workforce skills, readiness levels, and training needs related to Copilot.

- **Facilitate Local Engagement**: Engage local staff in discussions about Copilot, gather feedback, and communicate the benefits and expected changes.

- **Support Training Needs Analysis**: Identify training and development requirements for staff to ensure effective and confident use of Copilot.

- **Develop Prompts**: Contribute to the creation and refinement of Adult Social Care-specific prompts to improve the speed, efficiency, and impact of Copilot within social care workflows.

Project Team:

- **Coordinate Champions Network Activities**: Provide guidance, resources, and support to the Champions Network activities.

- **Facilitate Meetings and Communication**: Hold regular meetings with the Champions Network, providing structured agendas and action plans. This may include additional focused 'workshops' to look at specific functions.

- **Develop Assessment Tools**: Create tools and frameworks to help Champions gather data on workforce readiness and identify any training gaps.

- **Support Prompt Development**: Guide the development of prompts in collaboration with the Champions to ensure relevance and usability.

- **Analyse and Report on Findings**: Consolidate feedback and insights from Champions into a final workforce readiness report and a set of validated prompts.

5. Meetings and Communication

- **Frequency of Meetings:** The Champions Network will meet four times during the duration of this project, with additional focused group sessions scheduled as needed to support key project milestones

- **Meeting Format:** Meetings will be held virtually to facilitate attendance from all Local Authorities.

- **Communication Channels:** Champions are encouraged to communicate regularly with the project team through email, network meetings, ADSS Cymru website, social media and FAQs

- **Documentation:** Copilot will provide a summary and actions for each meeting, capturing key actions, decisions, and any areas for follow-up.

6. Duration

The Champions Network will be in operation for the duration of the workforce readiness assessment project, anticipated to run until **March 2025**.
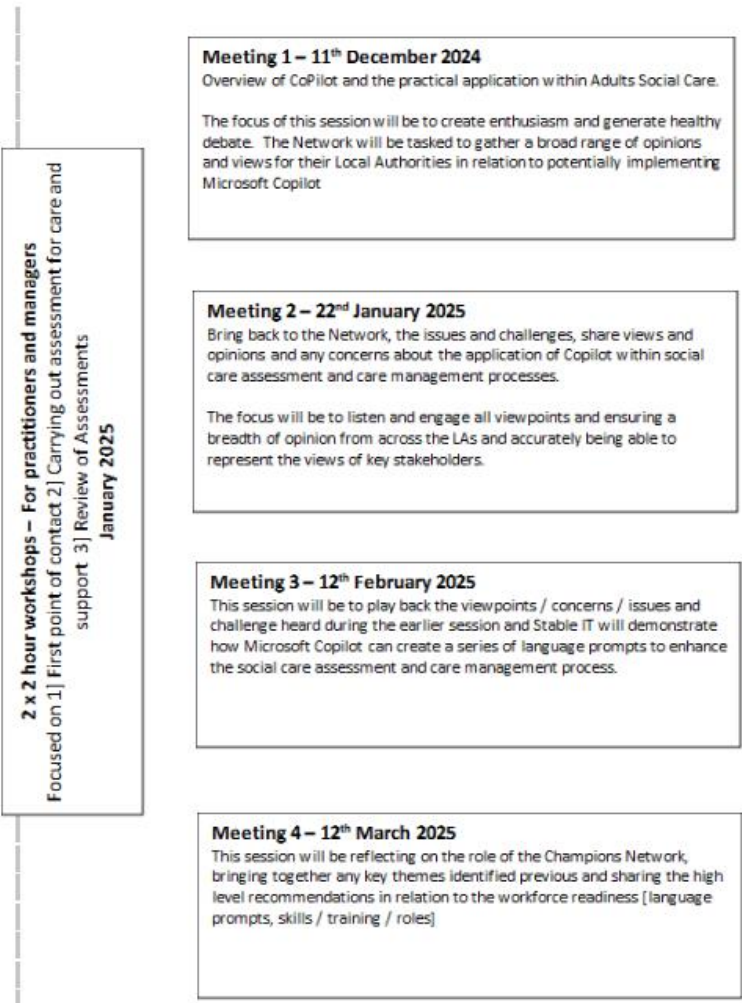
7. Review and Amendments

The Terms of Reference for the Champions Network will be reviewed by the project team and Champions to ensure it remains relevant and effective. Amendments may be made with the agreement of the project team and most network members.

8. Confidentiality and Data Protection

All Champions and project team members will adhere to confidentiality and data protection policies to ensure that any sensitive information gathered during the project is handled responsibly and securely. Champions must respect the privacy of their colleagues and maintain confidentiality regarding assessment findings and language prompt developments until formal reports are shared.

Table 6: Overview of Meeting Agendas for Champions Network

2 x 2 hour workshops – For practitioners and managers
Focused on 1] First point of contact 2] Carrying out assessment for care and support 3] Review of Assessments
January 2025

Meeting 1 – 11th December 2024
Overview of CoPilot and the practical application within Adults Social Care.

The focus of this session will be to create enthusiasm and generate healthy debate. The Network will be tasked to gather a broad range of opinions and views for their Local Authorities in relation to potentially implementing Microsoft Copilot

Meeting 2 – 22nd January 2025
Bring back to the Network, the issues and challenges, share views and opinions and any concerns about the application of Copilot within social care assessment and care management processes.

The focus will be to listen and engage all viewpoints and ensuring a breadth of opinion from across the LAs and accurately being able to represent the views of key stakeholders.

Meeting 3 – 12th February 2025
This session will be to play back the viewpoints / concerns / issues and challenge heard during the earlier session and Stable IT will demonstrate how Microsoft Copilot can create a series of language prompts to enhance the social care assessment and care management process.

Meeting 4 – 12th March 2025
This session will be reflecting on the role of the Champions Network, bringing together any key themes identified previous and sharing the high level recommendations in relation to the workforce readiness [language prompts, skills / training / roles]

Review of the Champions Network – Slido Survey Questions
Thank you for being a key member of the Copilot Champions Network. It would be great if you could spare us another 5 minutes of your time to provide us with some structured feedback on your experience as a Copilot Champion.

Overall Experience: What has been your overall experience of the Champions Network?

- Excellent: I have had a very positive experience and found the network extremely beneficial.
- Good: My experience has been generally positive with some minor issues.
- Fair: My experience has been mixed with both positive and negative aspects.
- Poor: I have had a mostly negative experience and found the network not very beneficial.

Impact on Local Authority: Has being a member of the Champions Network impacted on your local authority?

- Significant Positive Impact: The network has led to substantial positive changes and improvements within my local authority.
- Moderate Positive Impact: The network has resulted in some positive changes and improvements.
- No Impact: The network has not led to any noticeable changes or improvements.
- Negative Impact: The network has had a negative impact on my local authority

Resources – Live demonstrations / Copilot Prompts for Adult Social Care

- Very Effective: The resources have been very effective in helping me understand and utilise Copilot within our local authority.
- Effective: The resources have been somewhat effective.
- Ineffective: The resources have been mostly ineffective.
- Very Ineffective: The resources have been very ineffective.

Communication and Collaboration:

- Excellent: Communication and collaboration within the network have been excellent.
- Good: Communication and collaboration have been generally good.
- Fair: Communication and collaboration have been mixed with both positive and negative aspects.
- Poor: Communication and collaboration have been poor.

Benefit of Continuing the Network: Do you believe that continuing the Copilot Champions Network would be beneficial?

- Strongly Agree: I strongly believe that continuing the network would be highly beneficial.
- Agree: I believe that continuing the network would be beneficial.
- Neutral: I have no strong opinion on whether continuing the network would be beneficial.
- Disagree: I do not believe that continuing the network would be beneficial.

Open text box – If you agree, please provide any additional thoughts or suggestions.

Appendix B: Copilot Prompts

Prompts are the instructions or queries written by users to tell a generative AI assistant, like Microsoft Copilot, what response they would like. These prompts can range from simple questions to detailed requests for information.

How well Microsoft Copilot responds largely depends on the clarity and specificity of these prompts, as they help it understand the user's intent and deliver accurate and relevant answers. By structuring prompts thoughtfully, users can ensure that Copilot focuses on the most important parts of their question, leading to better results.

The benefits of well-crafted prompts extend across practitioners, teams, and organisations:

- For practitioners, clear prompts can streamline workflows and enhance productivity by providing precise answers and solutions.
- Teams can use structured prompts to facilitate better collaboration, ensuring that everyone is on the same page and working towards common goals.
- Organisations can share prompts to improve communication, decision-making, and overall efficiency.

Structuring prompts effectively is essential to maximise these benefits.

This section includes a number of prompts structured in the correct way to support the tasks carried out by people working in Social Services.

NOTES: In some of the example prompts below, there are words between brackets '< >', such as <file name> or <contact name>. The words in brackets are placeholders and need to be replaced by the prompt writer with a relevant word or name. For example, '<contact name>' could be replaced by 'Mr. Jones'.

All examples used in video guides are using fictitious names and do not reflect real life scenarios (case studies were created for demonstration purposes)

Task	**Email Summary**
Role	First Point of Contact
Copilot	Microsoft Outlook
Situation	People often need to read a summary of long emails, want to ask questions about how to respond, and search their mailbox for relevant messages.
Benefit	People can save time and make faster decisions with Copilot's help in summarising and responding to questions. Copilot can also easily bring many messages together on the same topic
Prompt	Create a summary of emails and messages that mention the individual seeking care and support <contact name>. I want to see all the messages I've been sent about her to help her access the social care services my team provides. Focus on emails in my Outlook mailbox and messages from Microsoft Teams since June this year. Use simple language but with a professional tone.
Video Guide	01 Email Summary.mp4

Task	**Public Protection Notice Summary**
Role	First Point of Contact
Copilot	Chat
Situation	Public Protection Notices (PPNs) can occasionally be grammatically ambiguous and unclear. Copilot can provide summaries of the text for improved comprehension. Additionally, users can ask Copilot to present the summary in chronological order and get advice on the next steps.
Benefit	Copilot saves the user time by listing unstructured information chronologically and suggests next steps to speed up decision making.
Prompt	Create a bulleted list that allows me to summarise a series of incidents documented in a Public Protection Notice (PPN). Use this Microsoft Word document <filename> which has the PPN content and is an unstructured account of each incident. Add the dates of each incident and list them chronologically. Add one recommendation for each incident suggesting what my team should do to support the people involved.
Video Guide	02 Public Protection Notice Summary.mp4

Task	**Preparing Notes**
Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	In this situation Copilot is used to summarise a list of notes. The notes may be taken during a conversation or home visit with an individual seeking care and support, and the user wants to create a more formal summary from the notes.
Benefit	Copilot saves the interviewer time, because notes can be written down in a haphazard way, like a stream of consciousness, without much thought for grammar or punctuation. Copilot can take that text and turn it into a summary that can be used to prepare case notes.
Prompt	Create a four-paragraph summary I can use for writing a care and support assessment for the individual seeking care and support. Use this file <filename> which is a list of notes I made after my last interview with the individual seeking care and support. Use simple language but with a professional tone of voice, that I can use for an official care assessment.
Video Guide	03 Preparing Notes.mp4

Task	Gauging Sentiment
Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	In this scenario we use Copilot to understand how the participants of a recorded conversation are feeling, based on what they say. The transcript of the conversation is used to summarise the sentiment of the individual seeking care and support.
Benefit	This allows the social care worker to quickly assess how the beneficiary was feeling during the call and understand in more detail how they can support the individual seeking care and support.
Prompt	Create a summary of how the individual seeking care and support is feeling during an interview they attended. Use this file which is a transcript of the conversation with the individual seeking care and support. Use simple language with a professional tone of voice that I can use for an official care and support assessment.
Video Guide	04 Gauging Sentiment.mp4

Task	Preparing a Care Assessment
Role	Carrying out a Care Assessment
Copilot	Chat
Situation	In this scenario the social care worker is tasked with producing a care and support assessment for a beneficiary. The assessment needs to draw information from several different sources, including notes made in Microsoft Word, emails and messages sent regarding the individual seeking care and support, and bring them together in one place.
Benefit	Pulling relevant information from multiple sources to support the development of a care and support assessment is time consuming and relies heavily on the memory and discretion of a busy human. Copilot can do much of the leg work to find and collate information from different sources and summarise and present it to the writer.
Prompt	Draft a report using the notes from series of conversations I've had with an individual seeking care and support <contact name> that I can use to prepare content for a care and support assessment. Use these notes from the conversations <file names>. Include any recommendations for <contact name> future care. Add details about their concerns. Summarise the key points from both visits. Use simple language with a professional tone of voice. Present the information in chronological order, using descriptive paragraphs, not bullet points.
Video Guide	05 Preparing a Care Assessment.mp4

Task	**Redacting Personal Identifiable Information**
Role	Carrying out Statutory Assessments
Copilot	Microsoft Word
Situation	Personally Identifiable information (PII) is content found in files and messages that may be considered sensitive by the subject. That could be a name, address or telephone number of a person. In many cases it is not appropriate to share PII in content when sharing it with other teams or externals partners.
Benefit	In this example Copilot is used in Microsoft Word to find the PII, including names, addresses and contact details, in a Word file. The PII is then removed from view by replacing the content with a tag labelled 'Redacted'. This saves the user time because they no longer have to find each piece of PII and manually redact it.
Prompt	Redact all the Personally Identifiable information (PII) from this file, so it can be shared with people who do not need to see the sensitive information.
Video Guide	06 Redacting Personal Identifiable Information.mp4

Task	**Summarising Transcripts**
Role	Carrying out Statutory Assessments
Copilot	Chat
Situation	A transcript records everything said in a meeting, including who spoke and when. It can be created from a Microsoft Teams call or an audio recording device. The transcript can be saved as a Microsoft Word file and used by Copilot to summarise notes from individual seeking care and support conversations. Previous notes can be referenced to track changes in the individual seeking care and support's situation.
Benefit	Transcripts can be long, so using Copilot to summarise the information is an efficient way to save time for the social care worker. It also allows them to concentrate on the individual seeking care and support without the need to take notes during the conversation. For users conducting many conversations each week that require notetaking, Copilot can shorten the process of documenting them
Prompt	Create four paragraphs I can use to add to a care and support assessment for an individual seeking care and support called <client name>. Use the latest transcript saved as a Microsoft Word file <file name>, and include these <file name>, which are other conversation I've had in the past. For each paragraph include areas of concern that I should be aware of and make recommendations on what the next steps should be to help the individual seeking care and support. Use simple language with a professional tone of voice.
Video Guide	07 Summarising Transcripts.mp4

Task	**Preparing for Meetings**
Role	All
Copilot	Microsoft Outlook
Situation	Social care workers have many meetings to attend, both in person and online. In this setting preparing for meetings and switching context to a new situation or the individual seeking care and support can be challenging.
Benefit	Copilot in Microsoft Outlook helps users prepare quickly for meetings, saving time and improving effectiveness.
Prompt	Give me a list of four talking points to help me prepare for my next meeting <meeting name>. Incorporate any emails and messages I've had relevant to this meeting. Show me background to the talk points and prioritise them so I understand what's important. Show them in simple language.
Video Guide	08 Preparing for Meetings.mp4

Task	**Improving Email Communications**
Role	All
Copilot	Microsoft Outlook
Situation	In certain situations, it can be challenging to write coherently and professionally about the subject matter. Copilot assists users in composing emails by applying a specific tone or structure to the messages, so helping the writer sound more engaging, casual, or professional as needed.
Benefit	Using Copilot to compose emails with a specific tone or structure offers the benefit of enhancing clarity and professionalism, saving time, maintaining consistency, improving engagement, and reducing stress. This helps Copilots users create messages effectively.
Prompt	Draft an email and ask for request information from <name> about care and support assessments. I need information on the procedures, key considerations, and any best practices you recommend when conducting care and support assessments. Draft an email in a polite, formal and professional tone. Use my name as a signature, and <name> as the recipient.
Video Guide	09 Improving Email Communications.mp4

Task	**Referencing Best Practices**
Role	Carrying out Statutory Assessments Reviewing of Statutory Assessments
Copilot	Chat, Microsoft Word
Situation	In this scenario the social care worker is writing/drafting a care and support assessment in Microsoft Word. Copilot is used to review the assessment. A second file, which is a list of report writing best practices is also referenced. Copilot is asked to compare the two files and make recommendations on what changes could be made to make the original file follow to the best practices.
Benefit	Using a file with best practices helps the assessment writing process in several ways. It can act as an educational tool because the best practice guide will show assessment writers what a good report should look like. It also allows more seasoned employees to update their skills as best practices change over time. The best practices document can be updated and maintained over time.
Prompt	I have written a report, which is a care and support assessment of the individual seeking care and support here <file name>. Can you read my companies guidance on best practices for report writing <file name>. Make some suggestions as to how I could improve my report. Show each sentence or paragraph you think I should change and then how I should change it based on the best practice.
Video Guide	10 Referencing Best Practices.mp4

Task	**Translating Content**
Role	Carrying out Statutory Assessments Reviewing of Statutory Assessments
Copilot	Microsoft Word
Situation	In this scenario a Microsoft Word document needs to be translated into another language. Copilot is used to create a new translation of the English text into Welsh from the existing file and keep the formatting of the original.
Benefit	Translating with Copilot saves time event if the draft translation is not the final version of the file.
Prompt	Translate this file <file name> into Welsh. Maintain any formatting in the new version.
Video Guide	11 Translating Content.mp4

Appendix C: Top Tips for using Copilot and creating Prompts

The following are a selection of best practices to ensure that Copilot is used safely and effectively, and that can also be used when writing prompts for using Microsoft 365 Copilot.

Refreshing Chats

Creating a new chat in Copilot for 365 allows the user to start a fresh conversation on any topic or query. This helps keep interactions organised and focused, making it easier to manage different discussions and tasks separately. Creating a new chat in Microsoft Copilot is useful for several reasons:

1. **Fresh Context**: Starting a new chat allows you to begin with a clean slate, free from any previous context or interactions. This is particularly helpful when you want to discuss a new topic or task without any influence from past conversations. It ensures that Copilot's responses are focused solely on the new query, leading to more accurate and relevant answers.

2. **Organisation**: Keeping different topics or projects in separate chats helps maintain organisation. It makes it easier to find and refer to specific conversations later. For instance, you can have one chat dedicated to project planning, another for research, and yet another for personal queries. This way, your interactions remain structured and manageable.

3. **Privacy and Confidentiality**: If you're discussing sensitive or confidential information, starting a new chat can help ensure that this information is contained within a specific conversation. This minimises the risk of accidentally sharing private details in unrelated chats.

4. **Improved Performance**: Over time, long and complex chats can become cumbersome. Starting a new chat can help improve the performance and responsiveness of Copilot, as it doesn't have to process an extensive history of interactions. This leads to a smoother and more efficient user experience.

Prompt Best Practices

A well-structured prompt ensures clarity, which helps Copilot understand the user's intent correctly. By providing specific details and context within the prompt, users can make sure Copilot focuses on the most important aspects of their question. Accurate prompts lead to relevant responses.

This is particularly important in complex tasks or when dealing with difficult topics, as it allows Copilot to break down the information methodically and provide well-rounded insights. Following best practices for prompt structure also helps users develop a habit clear communication with Copilot.

The following are a selection of best practices that can be used when writing prompts for Microsoft 365 Copilot.

The GCSE Method

The Goal, Context, Source, and Expectations (GCSE) approach to prompt writing with Microsoft Copilot is a structured method designed to enhance the clarity and effectiveness of prompts.

- The Goal is the primary objective or desired outcome of the prompt. It defines what the user aims to achieve by interacting with Copilot. This could range from obtaining specific

information, generating creative content, or completing a task. Clearly articulating the goal helps ensure that the response is aligned with the user's needs and expectations.

- The Context provides the background information necessary for Copilot to understand the situation fully. This includes any relevant details about the user's current state, previous interactions, or specific circumstances that might influence the response. By incorporating context, the prompt becomes more tailored and relevant, allowing Copilot to generate responses that are more accurate and useful. For example, knowing the user's location, time, or recent activities can significantly impact the relevance of the information provided.

- The Source refers to the origin of the information or the basis on which the response is generated. This could include specific documents, websites, or databases that Copilot should reference to provide accurate and reliable information. Specifying the source helps ensure that the response is grounded in credible and up-to-date information. It also allows users to verify the information if needed, enhancing the transparency and trustworthiness of the interaction.

- Finally, the Expectations outline the specific requirements or constraints for the response. This includes the desired length, format, tone, and any other preferences the user might have. Clearly stating the expectations helps Copilot tailor the response to meet the user's needs precisely. For instance, a user might request a brief summary, a detailed explanation, or a response in a particular style or tone.

By following the GCSE approach, prompt writing with Microsoft Copilot becomes more structured, efficient, and user-centric, leading to more satisfactory interactions.

Here's an example prompt using the GCSE method.
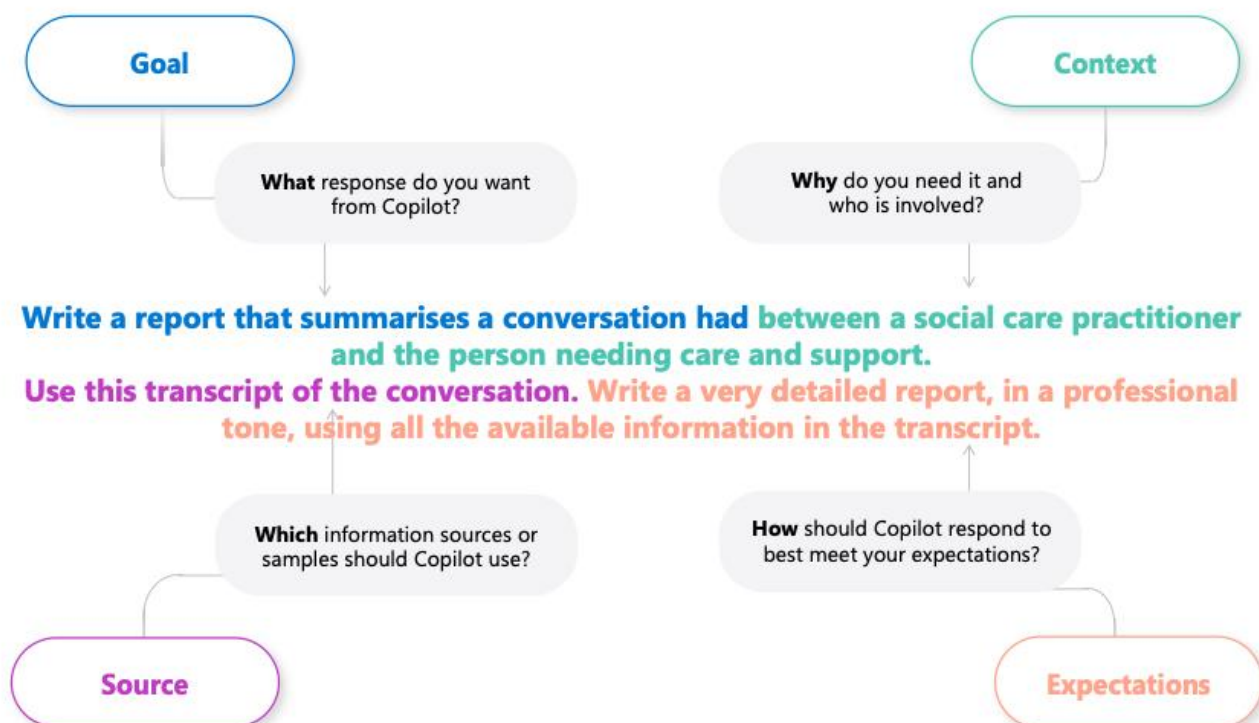
Managing Prompts

Microsoft Copilot for 365 offers several features to manage prompts effectively, enhancing productivity and collaboration. Here are some key features:

1. Saving Prompts:

This feature allows users to save prompts they find particularly useful for future reference. By saving prompts, users can quickly access their favourite or frequently used prompts without having to recreate them each time.

To save a prompt, after running a prompt, the user should click the 'Save prompt' icon. This will bookmark the prompt, making it easily accessible from the Copilot Prompt Gallery. Saved prompts can be organised and managed within the gallery.

2. Sharing Prompts:

Sharing prompts enables users to collaborate more effectively by allowing them to share good prompts with colleagues or team members. This feature ensures that best practices are shared across the organisation.

To share a prompt, the user can navigate to the prompt management pane, select the prompt, and choose the share button. They can then send the prompt via email or share it directly within Microsoft Teams. This makes it easy for others to use and benefit from the shared prompts.

3. Team Prompts:

Team prompts are designed to be used collaboratively within a team or department. These prompts can be customised and saved for team-wide use, ensuring consistency and efficiency in team workflows.

Create a prompt and customise it to fit your team's needs. Save the prompt and select the option to share it with your team. Team members can then access and use the prompt from the shared prompt library within the Copilot Prompt Gallery. This feature is particularly useful for standardising processes and ensuring that all team members are on the same page.

The following is an additional video resource about Copilot good practices:

12 Copilot Good Practices.mp4

Appendix D: Survey Questions

General – Demographic Information

1) Which local authority do you work for? [List of 22 Local Authorities]

2) What best describes your current role in social care?
- o Contact Officer / First Point of Contact
- o Social Services Practitioner / Social Worker
- o Team Manager
- o Group Manager / Service Manager
- o Head of Service
- o Other

3) Please indicate which of the below functions you undertake on a day-to-day basis?
- o Information, advice and assistance provided through a first point of contact
- o The assessment of need for care and support
- o The review of the assessment
- o Other

4) How long have you been working in social care?
- o Less than 1 year
- o 1-3 years
- o 4-6 years
- o 7-10 years
- o More than 10 years

Awareness and understanding of digital tools

5) How comfortable are you with using digital tools in your daily work? Give your rating.
- o Very Uncomfortable
- o Very Comfortable

6) How familiar are you with the concept of Microsoft Copilot. Give your rating.
- o Not Familiar at All
- o Very Familiar

Attitudes and behaviours

7) How do you feel about the potential use of Copilot to assist you to carry out your role
- o Excited
- o Optimistic
- o Anxious
- o Sceptical
- o I would need to know more to have an opinion

8) Do you think Copilot could help reduce the administrative burden within your role
- o Yes
- o No
- o I would need to know more to have an opinion

9) Do you think Copilot will enable you to spend more quality time with families
- o Yes
- o No

o   I would need to know more to have an opinion

10) **Rank your concerns [highest to lowest] about the use of Microsoft Copilot in social care?**
   o   Data Privacy and Security
   o   Potential changes to my role [more / less]
   o   Lack of understanding or training
   o   Impact on quality of decision making and analysis
   o   Deskilling my role
   o   Ethical consideration

Implementing Change

11) **How ready do you feel in relation to implementing change in the way you work on a daily basis?**
   o   Not ready
   o   Very ready

12) **Rank what you believe are the biggest challenges to implementing Copilot in social care?**
   o   Lack of Digital Skills Among Staff
   o   Inadequate IT Infrastructure
   o   Resistance to Change
   o   Ethical Concerns
   o   Lack of funding
   o   Lack of resources

Training Needs

13) **What type of training or support would you need to effectively use Copilot in your role?**
   You are able to choose more than one.
   o   Basic Digital Literacy Training
   o   Hands-on Training with Copilot
   o   Data Management and Analysis Training
   o   Ongoing Support and Troubleshooting
   o   Ethical Training on AI Usage

14) **What types of ongoing support would be most beneficial after initial training on Copilot?**
   o   Regular refresher courses
   o   Access to a support team such as the Champions Network
   o   Peer support groups
   o   Online forums or communities
   o   Other

Open Feedback

15) **Do you have any additional comments or suggestions regarding the use of Microsoft Copilot in social care?**

Appendix E: Semi Structured Interview Questions

1. Readiness for Change

How 'change ready' is your Local Authority in relation to potential adopting Microsoft Copilot / Ai tool into Adult Social Care Teams?

- **Red**: The Local Authority is not ready for change. There are significant barriers, such as lack of digital infrastructure, lack of appetite to use AI tools / insufficient staff training, or resistance to change, which would hinder the adoption of Microsoft Copilot.

- **Amber**: The Local Authority is somewhat ready for change. There are some challenges, such as partial digital infrastructure, ongoing staff training needs, or moderate resistance to change, but with additional support and resources, these can be addressed to facilitate the adoption of Microsoft Copilot.

- **Green**: The Local Authority is fully ready for change. There is a strong digital infrastructure in place, staff are well-trained and open to new technologies, and there is a clear plan for implementing and integrating Microsoft Copilot into the Adult Social Care Teams.

What steps (not related to IT systems) do you think are needed to prepare the workforce for the implementation of a resource like Co-Pilot?

- How can practitioners be included in the change process during roll out?

- What do you see as the role for senior leaders to ensure a smooth transition if this goes ahead?

2. Culture, Attitudes, and Behaviours:

How would you describe the current culture, attitudes, and behaviours within your Adult Social Care team towards adopting new digital solutions like Microsoft Copilot?

- Are there any specific factors or concerns that might influence the team's willingness or resistance to embrace this technology,

- What would need to be considered to address these to foster a positive adoption environment?

- How can we keep the person at the centre of our planning?

3. Resource / Capacity requirements

What specific types of resources and support would your Adult Social Care Team require to successfully implement and embed Microsoft Copilot into your daily operations.

4. Perceived challenges and barriers
What do you perceive as the main challenges or barriers to implementing Microsoft Copilot within your Adult Social Care team? • How would you plan to address these challenges to ensure successful adoption? • How digitally competent are staff? Do all social workers/ potential users have easy access to computers? What might be needed to support this

5. Policy Review and Compliance:
What existing governance, compliance and corporate policies would need to be reviewed or updated to ensure a smooth and compliant adoption of Microsoft Copilot into Adult Social Care Teams?

6. Lesson learnt from previous digital transformation / change management projects [to enable a smooth implementation for Copilot]
Open question • Does the local authority have any previous experience of implementing large (digital) changes? How did the process go? Any reflections that could help this time

Appendix F: E3 and E5 Licence capabilities

The following table provides an overview of pertinent features for Microsoft 365 E3 and E5 licences, indicating their availability in each plan:

Feature	E3	E5
Security and Compliance	Basic	Advanced
Analytics	Basic	Advanced
Identity and Access Management	Basic	Advanced
Threat Protection	Basic	Advanced
Information Protection	Basic	Advanced
Compliance	Basic	Advanced
Microsoft Defender for Endpoint	Plan 1	Plan 2
Customer Lockbox	No	Yes
Defender for IoT - Enterprise IoT Security	No	Yes
Immersive Spaces for Teams	No	Yes
Information Protection and Governance Analytics - Premium	No	Yes
Microsoft Defender Application Guard for Office	No	Yes
Machine Learning-Based Classification	No	Yes
Microsoft Endpoint DLP	No	Yes
Microsoft Insider Risk Management	No	Yes
Safe Documents	No	Yes