



ADSS Cymru

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Leading Social Services in Wales

The Implementation of Microsoft Copilot in Social Care in Welsh LAs: A Review of Learning and Progress

WELSH LOCAL GOVERNMENT ASSOCIATION

On behalf of

ASSOCIATION OF DIRECTORS OF SOCIAL SERVICES (CYMRU)

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Acknowledgement

During this review, the Association of Directors of Social Services (ADSS) Cymru Project Team, via Practice Solutions met with a wide range of stakeholders representing local authorities (LAs) across Wales. The time and effort that practitioners, managers, heads of service, digital leads, and others put into this review has been greatly appreciated at a very busy time for social care. We hope that this report is beneficial in progressing digital support in social care.

Executive Summary

The Welsh Local Government Association (WLGA) commissioned the Association of Directors of Social Services (ADSS) Cymru, working with Practice Solutions to undertake a rapid review of Microsoft Copilot adoption in adult social care services across Wales.

This work follows on from the report '[Assessing the digital and workforce readiness of LAs to implement Copilot in Adult Social Care in Wales](#)'¹ (2025).

17 of the 22 LAs in Wales participated in the review through surveys and interviews.

Over the past 12 months, the AI landscape has evolved considerably. AI technology continues to mature, with new products coming to market on a regular basis. It can be challenging to keep pace with developments and to take decisions within the context of an emerging evidence base as guidance and legislation are still being developed.

This rapid review identified a number of themes in relation to the use of Microsoft Copilot in LAs across Wales, which are summarised below.

Readiness and Progress

The majority of LAs have run pilots of Microsoft Copilot and continue to use the tool. Some LAs have purchased larger numbers of licenses, though these are not always used in adult social care. Few LAs are planning to roll out Copilot at scale at this time. A couple of LAs have decided to opt out of Copilot, due to other priorities like Case Management System (CMS) migration or in favour of a different AI tool.

Most LAs are also using or considering using other AI products alongside Copilot. Magic Notes is also popular across LAs. The workforce is now said to be largely accepting of AI technology, which is a shift from a more mixed picture last year. Digital leads are using some of the 'back office' functions to monitor usage and assign security settings, but approaches and maturity continue to vary widely between LAs.

Governance and Risk Management

Governance varies widely across LAs. Some have AI boards or dedicated AI / transformation leads in post, while others rely on digital leads taking decisions in isolation. Some LAs have created specific policies and regulate how Copilot is used in practice. Others have not done so and have little in place to monitor its usage. Concerns were expressed that LA policies may conflict with other legislation such as GDPR and data retention rules in some instances. Frontline staff using Copilot are not always aware of guidance around its use. Some LAs have granted access to the standard Microsoft version across the service – while others have restricted the usage to only a few senior managers and have disabled access for staff.

There was a universal call for national bodies to support with the provision of guidance and legal advice about acceptable AI usage in Wales. Awareness of existing national policies such as the Social Care Wales [AI Guide for Social Care in Wales](#)² was fragmented and participants of the

¹ ADSS Cymru (2025). Assessing the readiness of adult social care teams across Wales to implement Microsoft Copilot. [Online] Available at: [Implementing Microsoft Copilot in Adult Social Care](#) [Accessed 3 March 2026].

² CACI on behalf of Social Care Wales (2025). AI Guide for social care in Wales. [Online] Available at: [AI guide for social care in Wales - Social Care Wales - Research, Data & Innovation](#) [Accessed 12 March 2026].

review reported confusion about where to go for advice and support, as well as duplication and mixed messaging from national bodies.

Use in Practice

Copilot is a broad tool with wide application and is preferred by those people that use its wider functions (such as research or drafting reports). However, Copilot is not performing as well as more focused tools such as Magic Note for specific tasks (such as the transcription of meetings). Copilot also still has limitations around Welsh language translation. The standard version of Copilot is said to have increased in functionality, and it is now nearly as effective as the paid 'E3' or 'E5' versions, and LAs note that for most staff, there is no need to purchase higher level licences. Some LAs are working together across departments to create custom agents tailored to each service, while others are restricting users to a small number of specific prompts and not promoting innovation.

More LAs use Copilot for senior roles, while Magic Notes is used more for administrative roles. There are exceptions to this, with some LAs reporting significant benefits in using Copilot with social workers to support report writing and assessments.

Training has been variable across LAs, with some users being self-taught, and others having robust ongoing support and champions groups. One challenge is that training needs to be tailored to individuals and teams depending on need, intended usage, and digital confidence. Magic Notes is intuitive while Copilot requires the development of the new skill of crafting instructions and developing prompts.

Evidence and Impact

There is an emerging evidence base for the potential benefits of Copilot in practice in Wales – staff using the tool widely report time saved and better wellbeing, with more time to spend with people they support. However, Copilot can make errors, and AI generated content must be checked and owned by practitioners. LAs are not sharing their learning with each other beyond informal conversations and are largely unaware of evidence to support larger financial commitments.

While staff using Copilot reported that it assists practice and is compatible with professional values, there were some concerns about public perception about the use of AI. There is no clear evidence that AI will replace jobs at this stage, which was a common concern in phase one. However, one LA has been able to reduce their administrator roles by a third through attrition since using Copilot for meetings.

Barriers and Challenges

The major barriers and challenges identified in the rapid review include:

- Funding and lack of a clear evidence base for adult social care
- Governance factors (risk tolerance, guidelines and policies)
- Confusion around licensing options and suitability for particular roles
- Digital infrastructure challenges

Enablers

For LAs, the major enablers include;

- Multidisciplinary approaches and collaboration across service areas including Digital, HR, Workforce leads, managers and frontline staff working together

- Dedicated leads
- Targeted investment – selecting the minimum level and number of licences to meet the needs of services
- Having SharePoint in place and customising settings based on local need

National enablers included:

- The provision of legal advice, up to date information and guidance
- Shared learning and forums to create and problem solve

Recommendations (summary)

The full detail of recommendations can be found at the end of this report.

For National Organisations to:

- 1) Facilitate a national AI Champions Network
- 2) Develop a central learning hub and evidence base
- 3) Provide guidance and legal advice on the use of AI in LAs and a matrix detailing the different licencing offers to support selection of the correct product
- 4) Promote consistency across public organisations

For LAs to:

In consideration of existing good practice and guidance in development across Wales, the following recommendations are considered - For LAs to:

1. **Assign a programme lead(s)** to oversee innovation and system transformation with Copilot / AI tools, and to ensure strong governance is established alongside the development of comprehensive guidance and policies on its use.
2. **Use multidisciplinary approaches.** To ensure that Digital leads, HR and workforce development teams work with social care managers and practitioners to implement Copilot / AI tools into practice and tailor its usage in different settings and roles
3. **Purchase licences strategically** based on need, being mindful that the standard licence is often enough, while those using broader functions will require the higher licence.
4. **Offer ongoing support and training to staff** using Copilot, and monitor usage to ensure safety and efficient use of purchased licences. To ensure that AI training forms part of annual training needs assessments and links to workforce plans in LAs.
5. **Evaluate impact to establish an evidence base** for what works and learn from other authorities through shared learning and collaboration

Introduction

Background

Rapid advancements in artificial intelligence present the potential to radically alter the way that services operate in modern society. For public services, these advances present both opportunities and challenges. In Wales, LAs have been exploring the use of artificial intelligence over the past few years. In 2024, the Welsh Local Government Association (WLGA) commissioned the Association of Directors of Social Services (ADSS) Cymru to undertake a Wales wide review of LA readiness to implement Microsoft Co-Pilot into adult social care services. Copilot had been selected as the most accessible AI tool at the time of the study, because all LAs were using Microsoft Office 365.

Phase one of the Copilot Readiness work included workforce and digital readiness assessments undertaken with LAs. A national report was produced summarising the findings alongside bite-sized training videos and tutorials. These can be accessed via the [ADSS website](#)¹.

During phase one, the following key messages were identified:

- Most LAs had the basic digital infrastructure in place to support the adoption of Copilot, but additional readiness activities were required
- There was enthusiasm for the potential of AI, but few LAs were using it in practice. Some early pilots were underway
- The workforce expressed some concern around ethical and privacy / GDPR issues
- Participants expressed a need to support implementation with robust training, an ongoing network and champions support.

Microsoft Copilot Implementation Review: Phase Two

This rapid review took place between December 2025 and March 2026 and follows on from the initial work undertaken. Also commissioned by the WLGA on behalf of ADSS, the aims of phase two include:

- To understand how LAs have used Copilot in adult social care teams since the first review
- To learn how national organisations can best support LAs with readiness for Copilot implementation, and to understand ongoing barriers to implementation
- To identify how LAs have approached implementation and to capture learning and good practice for wider adoption

Alignment to wider digital and AI activities in Wales

This project supports the [DiSC Cymru framework](#) under the 'Brilliant Basics' Pillar. The review undertakes discovery work to establish existing practice and opportunities, aligned to the 'Know your service' milestone. It also supports understanding about digital and workforce skills, confidence and capacity as it relates to Copilot / AI usage, which is a key element of the 'Know your people and skills' milestone. It further improves knowledge about AI solutions to automate routine tasks, enhance service delivery and support data-driven decision making, an objective under 'Know your data'.

The Welsh Government Office for AI is also undertaking a review of transcription tools used in

social care. More can be found about the new Office for AI³ through the link.

Through targeted engagement and evidence gathering, this review explores the use of Copilot in practice, to understand the evidence base, as well as staff skills and needs, the impact on practice and staff wellbeing.

The project directly supports the [Digital Strategy for Wales](#)⁴ by continuing the work on assessing and building the digital readiness of adult social care teams across Welsh LAs.

Through targeted engagement and evidence gathering, the project helps LAs adult social care teams to identify how they can embed digital inclusion and ensures that digital transformation benefits LAs on their digital journey not just those that are already digitally mature.

The project aligns with the [Wellbeing of Future Generations Act](#) by focusing on long-term improvements in digital and workforce readiness for adult social care, preventing digital exclusion and workforce shortages, and integrating efforts across digital, workforce, and governance teams. It actively involves a wide range of stakeholders, supports collaboration, and contributes to the Act's well-being goals by promoting a prosperous, resilient, and healthier Wales through improved digital capability, reduced inequalities, and continuous service improvement.

By continuing to identify the skills gaps and support needs, it enables more effective, efficient, and equitable service delivery, aligns with the Strategy's missions of digital services, digital inclusion, and digital skills, and fosters collaboration and shared learning across the sector.

³ Welsh Government (2025). Written Statement: Artificial Intelligence and Digital Transformation in Welsh Public Services. [Online] Available at: [Written Statement: Artificial Intelligence and Digital Transformation in Welsh Public Services \(18 September 2025\) | GOV.WALES](#) [Accessed 22 March 2026].

⁴ 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](#) [Accessed 1 March 2026].

Methodology

Governance

This work sits within the '[Brilliant Basics](#)' pillar of the DiSC program. Regular highlight reports were provided to the WLGA and ADSS Cymru for sharing within the networks. Findings from this report will go towards supporting the delivering of the pillar and national approach to digital technologies.

A senior manager from ADSS Cymru supported the project throughout, attending some of the interviews and providing the perspective of a Director to inform the analysis and final report. ADSS Cymru are working closely with WLGA, providing advice and guidance on a range of DiSC projects. Senior leaders in social care have been seconded on a part time basis to provide information at both a strategic and operational level on the impact of changes to digital support in social care.

In addition, ADSS Cymru are delivering two projects at discovery level, this Copilot project is one, and the other ASPIRE project, links into the Bright Ideas pillar. It is developing a co-designed app, with care experienced young people, to provide a single easy to use digital hub where young people can access up to date trusted information and support. Both projects are due to report finding at the end of March.

Following a series of engagement activities, a thematic analysis was undertaken to assess how LAs have progressed with the use of Microsoft Copilot. Below is more detail about the engagement activities.

Engagement Activities

Several engagement activities were undertaken over the course of the review. These included:

- A survey circulated through previously nominated LA Copilot leads, heads of service and Directors, encouraging participation across a breadth of roles
- Semi structured interviews held over Microsoft Teams with self-selected participants
- A targeted survey of the views of frontline practitioners, who had taken part in focus groups during the first phase of the work

In total, 17 out of 22 LAs took part in the review. One of the aims of this review was to ensure that reviewers engaged with LAs that had declined digital readiness assessments in Phase one. Reviewers spoke with 3 out of 4 LAs that had undertaken their own phase one assessments, who provided detailed updates on their use of the Copilot tool. All 22 LAs had engaged in workforce readiness assessments during phase one. People with a broad range of roles participated n=48.

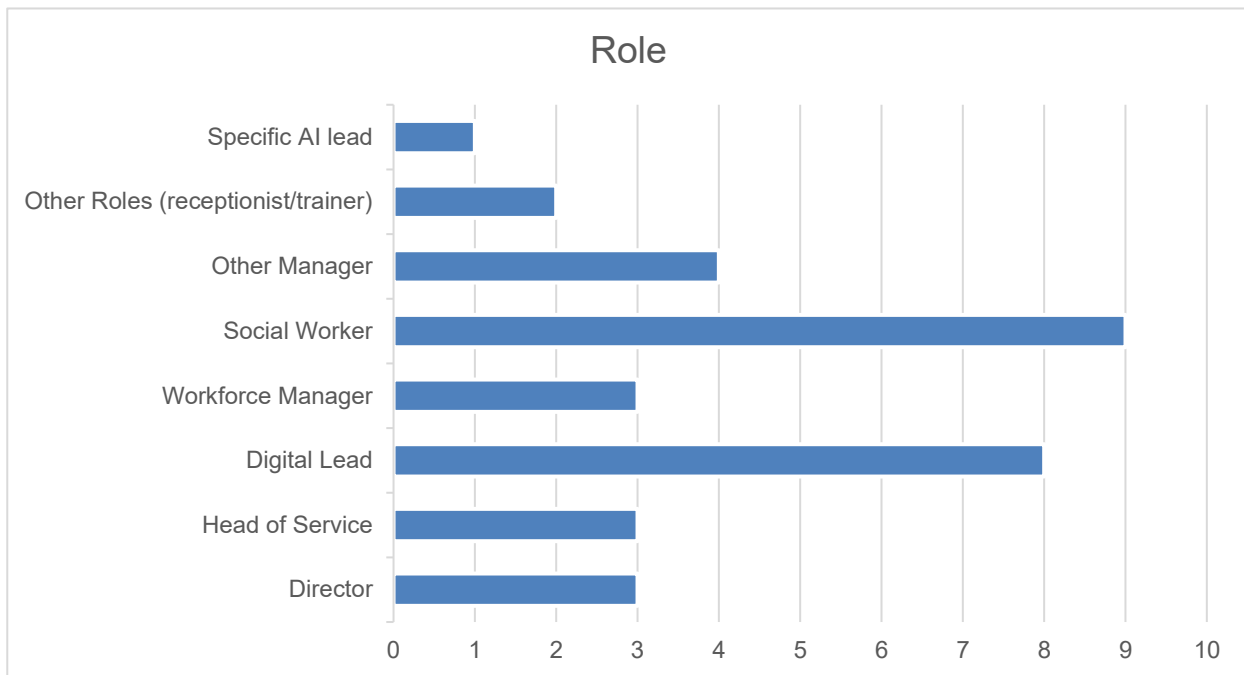
Survey – Microsoft Copilot in LAs: Phase Two

The survey was circulated through previously nominated LA Copilot leads, heads of service and Directors, encouraging participation across a breadth of roles. It covered the following themes:

- Perceived readiness
- Awareness of recent activities related to Microsoft Copilot implementation
- Learning, barriers and opportunities
- A poll of which actions would be most useful (based on last year's report recommendations)

30 responses were received from people representing 14 LAs, covering 6 out of the 7 regions in Wales. There was a good diversity in the roles of respondents, as illustrated below:

Chart 1: Survey Respondent Roles



Detailed survey findings are summarised throughout the report alongside the intelligence from other engagement activities.

Survey – Practitioner Insights

Respondents self-selected from a group of 89 frontline practitioners who took part in the Phase One Copilot focus groups in 2024-25. Focus groups had explored how Copilot could potentially impact on practice, and participants worked with digital leads to develop language prompts that address some of the key issues raised. The survey was disseminated 12 months after phase one work, and questions were repeated to gauge any changes in views or impact.

The survey covered the following themes:

- Impact on practice
- Ethical and professional considerations
- Barriers and enablers to Copilot implementation

7 practitioners responded to the survey, representing 5 LAs. Participants were all frontline practitioners in adult social work teams. Roles of respondents included social work assistant, social worker, senior practitioner and team manager.

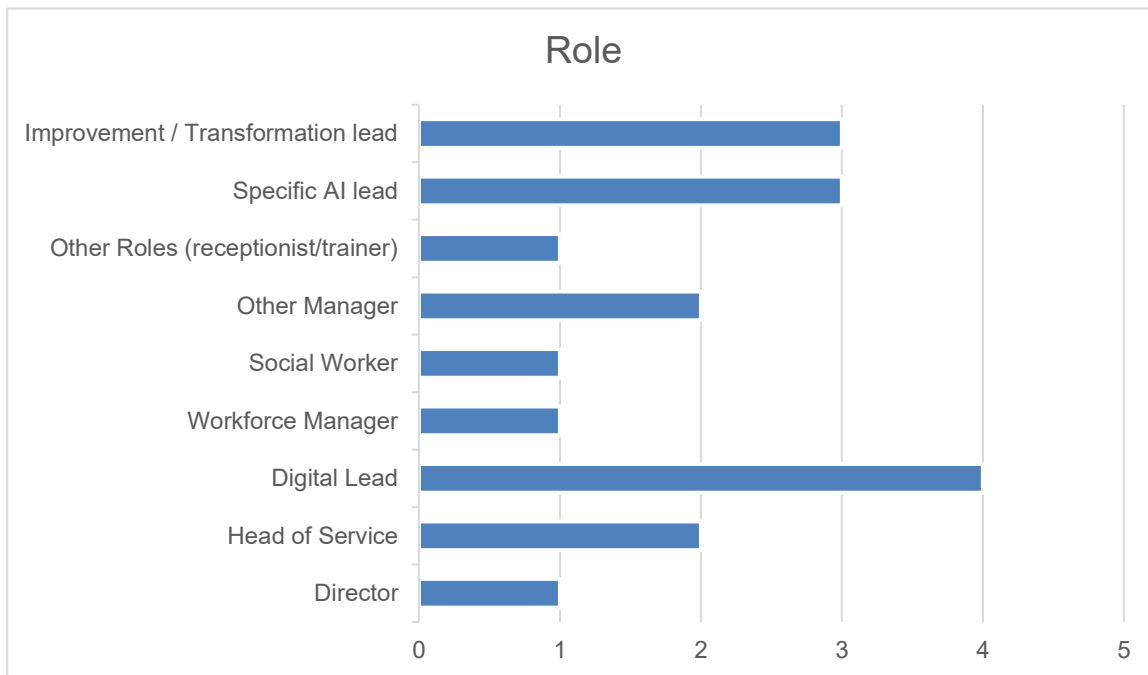
Themes

Despite a small response rate, Phase 2 findings indicate practitioner support for Copilot and clear perceived time savings across key administrative tasks in Adult Social Care. Many respondents reported positive impacts on professional practice and increased capacity for direct work. However, gaps remain in training, system integration and local governance, alongside ongoing concerns about GDPR, accuracy and ethical use. While Copilot’s potential benefits are evident, further work is needed to ensure consistent, safe and well supported implementation.

Interviews

18 people took part in interviews, representing 9 LAs. Chart 2 sets out the roles represented. Many of the interview participants had also completed the survey.

Chart 2: Interview Participant Roles



Approach

This review draws on survey results, transcripts of interviews and qualitative notes taken during discussions. Across all engagement activities, the following themes emerged:

- Readiness and Progress
- Governance and Risk Management
- Copilot use in Practice
- Workforce Culture and Ethical Considerations
- Technical Considerations
- Evidence and Impact
- Barriers and Challenges
- Enablers

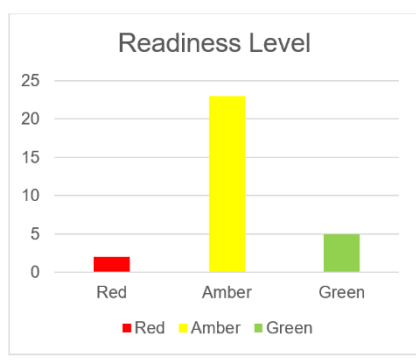
Summary of Findings

Readiness and Progress

There has been a big shift in readiness and progress in adopting Microsoft Copilot over the past 12 months. LAs have moved from curiosity and early exploration to adoption in many cases, though some organisations have opted to use other AI tools as well or instead of Copilot.

The survey used the same traffic light system as the original readiness assessments, and respondents selected the category they felt most represented their LA's current position. The results were as below:

Chart 3: Overall Copilot Readiness Levels identified by Survey Respondents



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

Amber: The LA 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 LA 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.



As was the case in Phase One, the majority of LAs identify themselves as being at the amber level of readiness. In general, those in the amber category report using Copilot on an ongoing basis in practice, with some capturing impact but most at earlier stages of implementation. There is wide variation reported in terms of the approach taken to implementation and ongoing use of the tool, which is explored throughout the report. Of the two LAs identifying as red level of readiness, one noted that they have chosen other AI tools following a trial where Copilot was deemed not suitable, and the other stated that they have very few licences in the LA, with none in social care. Those who identified as 'green' reported similar positions to those in the 'amber' group, that is those LAs are using Copilot to varying degrees in some services, but still in early phases of implementation without widespread roll out planned.

Digital Readiness

In phase one, it was identified that most LAs had the basic digital infrastructure in place to support the adoption of Copilot, but that additional readiness activities were required. During this review, digital leads report that there is variation in terms of how they have progressed with readiness activities. One LA noted that they closely monitor how the tool is used using Copilot administrative audit functions. A few noted that they manage which files can be accessed by the tool based on service area, though those LAs stopped short of detailed labelling functions. Most digital leads felt that it would not be helpful to pursue 'once for Wales' labelling because of local preferences around how they would want to organise the files. Some LAs restrict which agents / prompts can be deployed and strictly limit how practitioners can use the technology. Others encourage more open experimentation and innovation, working with users to create new agents and prompts.

There was a recommendation in phase one for LAs to purchase a small number of Microsoft E5

licences for technical leads, using lower functionality E3 or standard version licences for frontline staff. This was generally welcomed by digital leads, but one LA had not pursued this because their current priority is a migration to a new Case Management System and larger changes in the digital landscape, while another noted that they are still exploring the wide range of AI tools before deciding which licence to purchase. Most LAs expressed still feeling that they are in the early stages of implementation, so they have not yet had the opportunity to fully exploit the potential of the technology.

Some digital leads work behind the scenes without any formal interaction with social care managers and AI users, while others report working very closely with users and services to customise how AI is used to best suit the needs of each service. Those who are working more closely together have noted that each service has different requirements with regards to how they use the tool.

Those who undertook their own readiness assessments during phase one reported similar positions to those who participated in the STABLE led assessments last year. There was a commonly expressed view by digital leads that having facilitated readiness assessments is not as helpful as independent ones, due to affiliations between vendors and Microsoft, with potential commercial interests. Local digital leads also identify as the experts on their organisation's needs and wishes. Regardless of which type of assessment was undertaken, the same range of activities seem to have taken place through digital leads.

Workforce Readiness

In phase one, those LAs that had expressed feeling more ready had common characteristics, including

- The support of senior leadership
- Working groups
- Programme leads / champions

This trend has continued over the past 12 months. There is a clear difference in readiness between LAs that have taken a more ad hoc approach to implementation and those who have identified leads in post, with the latter being further ahead embedding use into practice.

There continues to be a high level of enthusiasm for AI amongst the workforce, however in practice, some frontline practitioners express feeling less confident with Copilot than other AI tools like Magic Note due to a higher level of skill and understanding required with Copilot to 'craft' prompts in practice.

Table 1 shows a summary of focus group participant concerns identified in phase 1 and views about the use of Copilot expressed in phase 2 by those frontline practitioners with licences.

Table One: Concerns Expressed about Copilot in 2024 vs. Current Views in 2026

Concerns about Copilot (2024-25) ranked by highest to lowest	Current views about Copilot (2026) as expressed by review participants
1. Lack of understanding or training	Mixed responses – some have received basic training, but most reflect being self-taught. Those with licences expressed feeling more confident after using Copilot in practice.
2. Impact on quality of decision making and analysis	LAs report that senior managers tended to use Copilot for research, strategy and analysis purposes, while frontline practitioners tended to use it for more practical analytical tasks. There was limited evidence during this review that it has been used to directly influence decision making.
3. Data privacy and security	None of the frontline practitioners surveyed were able to confirm if their LA had specific policies in place around using AI. Two noted that there are informal guidelines in place, while half of respondents felt there is no internal guidance.
4. Ethical considerations	<p>Most LAs report using a ‘human in the loop’ approach i.e. Ensuring that any AI generated content is checked by a human practitioner who then owns the work, as advocated in the phase one report.</p> <p>Members of the public / other professionals are informed if they are being recorded which is normally accepted, though there were some comments about public confidence continuing to lag behind with regards to trust around AI usage.</p> <p>There seems to be a common view that when used as a tool to support administrative functions, this can then free up the practitioner to spend more time with the person accessing support, resulting in better quality care.</p>
5. Potential changes to my role	Frontline users of Copilot report less time spent on administrative activities and more time to spend with people they support, and easier report writing / review processes. None report negative impacts. One LA noted that they have not replaced vacant administrative roles as a result of the positive impacts of AI tools on reducing administrative burden.
6. Deskilling my role	None of the respondents reported feeling deskilled.

Participants noted that the workforce is now almost universally accepting and welcoming the use of AI tools, with some exceptions. Some concerns remain in some services about AI applicability in specific settings such as court hearings or child protection proceedings, though some LAs are using Copilot in these instances to good effect.

There is increasing confidence and acceptance of Copilot (and other AI tools) amongst the workforce, but readiness remains inconsistent depending on the approach organisations take towards its adoption, with constraints resulting from senior lead and digital team risk tolerance and views on the use of AI.

The Discovery Project 'AI in Law' is reporting to the DiSC Bright Ideas pillar – it will help to clarify the acceptable use of AI in Court Settings.

Governance and Risk Management

Governance maturity varies significantly. Some LAs have AI boards in place and emerging policies and guidelines around its use. Others report experiencing conflicting advice from IT, fragmented approval routes, or high levels of risk aversion, particularly with regards to data protection, court work, and recording policies. There is concern that each LA will be producing slightly different advice with regards to matters such as data retention policies, and it is unclear what this would mean if challenged in court. Similarly, settings around how long recordings and transcripts are held vary LA to LA and in some instances are not in line with GDPR legislation. Some external agencies do not allow the use of AI tools in meetings, including some police and NHS organisations – this leads to complications when in multi-agency meetings.

Practitioners surveyed reported a lack of awareness around governance in their LA. None were able to confirm whether specific policies were in place, while three respondents were unsure whether those who access care and support are aware of Copilot being used.

Senior leads interviewed expressed a much greater understanding of LA governance positions. Many leads expressed that AI is still in its infancy and constantly evolving, which makes signing off emerging policies a challenge due to the changing landscape.

Corporate risk tolerance seems to be a critical factor in terms of the level of governance in place, with some LAs strongly restricting usage with ICT-led permissions, while others encourage open innovation and experimentation. Some require individual managers to purchase licences and take decisions about who qualifies, while others have unlocked blanket access across staff groups.

Participants in the review express confusion about the existing fragmented national infrastructure around AI and digital technology. It is unclear what role different national agencies have in overseeing and providing guidance, and there is a sense that there is a lot of duplication of effort. Many participants report being invited to participate in multiple groups / reviews / surveys on similar themes and not understanding how national bodies are working together.

Across all authorities, there is a **universal call for consistent national guidance**, including:

- National legal advice
- Minimum standards and expectations around the use of AI
- Clear rules for using AI and court admissibility (in progress)
- Clarity and agreement across public services and national bodies about using AI in practice and agreements between agencies about how they use it in joint meetings, when sharing information and within multidisciplinary teams.
- Consideration of the creation of an AI national procurement framework to support the use of 'trusted' companies and to avoid duplication in processes by being able to 'call off' appropriate providers for different AI needs. A pipeline project is underway under the 'Big Change' pillar of the DiSC program looking at this. The project objectives include,

To understand, evidence and test the challenges faced by Welsh Local Authorities and independent social care providers when procuring digital tools and services in the social care community care sector.

To explore whether current procurement mechanisms are delivering value

To identify opportunities for improvement

In summary, when compared to phase one activities, more LAs are now developing specific AI policies, and most have digital groups or boards in place to oversee developments. However, other LAs are lagging behind and attribute this to a lack of clarity from national bodies or lower levels of corporate risk tolerance. Awareness of local AI policies varies and appears to be low amongst frontline practitioners when compared to senior managers, which suggests a need to clearly communicate expectations with licence holders to understand acceptable use.

Copilot Use in Practice

The phase one review focused specifically on adult social care teams undertaking three functions, including Information, advice and assistance provided through a first point of contact, the assessment of need and care planning and the review of care and support plans.

During the phase two review, it became clear that while a few LAs have given adult social care teams larger numbers of licences, the reality is that there is wide variation, and most are still only offering small numbers of licenses across many departments in the LA. For example, one area has given most licences to children's social care teams for use with administrative tasks, another has given it only to senior managers, while a third LA has spread licences widely across the organisation. This has meant a more fragmented, rather than phased approach to implementation. A few LAs have provided the standard ('free') version to all employees, while others have locked this down.

Overall, despite this variation, there has been a lot of progress towards implementation of MS Copilot over the past year across Wales – and of AI generally.

During phase one, there was enthusiasm for the potential of AI, but few LAs were using it in practice. This review found that most LAs had undertaken pilots over the past year and were using it in practice.

LA practitioners and managers report using Copilot for the following tasks:

- Creating first drafts of reports, assessments and care plans
- Drafting correspondence
- Summarising (multiple and large) documents
- Complaint responses
- Minutes of meetings (though Copilot is used less frequently than Magic Notes for this task)
- Policy scanning and research
- Collating evidence for panels
- Chronologies and casefile analysis
- Minutes for internal meetings
- Managing emails
- Chronologies
- Audit
- Rotas
- Drafting press releases
- Support for supervision and PDRs
- Mental capacity assessment support

- Assisting with research and strategic work
- Preparing court paperwork
- Using Copilot to adjust the tone and language of care plans to suit the needs of service users and to avoid jargon, especially in Learning Disability and autism services
- Piloting a handwriting recognition function for hospital referrals to reduce typing burden

While some LAs use Copilot for administrative tasks, more often Magic Notes / Scribing or other AI Tools are used for:

- Case recording
- IAA contacts
- Minute taking and transcription
- Child Protection Conferences (some MARAC agencies do not allow the use of Copilot)
- Redaction (Adobe AI and other tools were felt to be more effective)

The strongest consensus is that frontline practitioners and administrators tend to prefer transcription tools, while managers and back-office roles favour Copilot. However, there are exceptions to this, and some social workers use Copilot for administrative functions as well.

One social worker commented,

“I think it is great for meeting notes and also supporting Social Workers to complete assessments. However, these notes do need to be proofread for accuracy. I have noticed that some of my meeting notes may have incorrect names or information that has been misinterpreted.”

Some LAs have not yet offered licences to social workers, as they are still testing the tool with managers or administrative staff.

The ability to load forms is felt to be stronger in Magic Notes, though Copilot is making improvements that are anticipated to support it offering similar capabilities in the near future.

Maturity varies with regards to use – some LAs are developing structured agents and prompts to undertake specific functions tailored to individual teams, while others are providing licenses but not undertaking these activities.

Many of the LAs engaged identified that they find Magic Notes or equivalent AI tools better at undertaking specific administrative tasks such as note taking and transcription. Copilot is reported to be limited in a few ways, including ongoing poor Welsh translation and recognition skills, and inferior abilities to capture voices during in-person meetings, with the need for bulky and expensive additional equipment to be moved from room to room. It also requires that users understand how to craft their request, where other AI tools do this behind the scenes, which is more accessible for those with less digital confidence. Copilot still has some difficulties interacting with certain Case Management Systems.

The strengths of Copilot include its broad application to functions such as research, summarising information and drafting reports / correspondence. Digital leads noted that its capabilities have greatly improved over the past 12 months, though it does still make errors and is reported by some users to be clunky at times when handling data.

Approach to Adoption

One of the major differences between LAs is the approach they have taken to adoption – some with very tightly controlled use, and others encouraging more free experimentation. This is

illustrated through the quotes below from two different LAs:

LA 1) *I suppose we started with a group of people who were very keen and we gave them some licences and we gave them kind of free reign almost to do their work with co-pilot and then we looked up their experience and we from that determined what we needed to do as a whole kind of mass implementation. .. we work together [with IT] and use champions to teach other practitioners how to get the best from co-pilot.*

LA 2) *It has always been the case of how one individual feels and it has never been questioned before...but now it is being talked about by senior leadership...we do seem to be the ones left behind*

Training

Training has been inconsistent – most LAs offer a basic introduction through a brief face to face session or webinar. A couple of LAs offer ongoing support through a dedicated lead and drop in / development sessions. Some staff with licences report not having had any specific training and learning as they go along or by accessing online videos.

When asked about the training provided by their LA in relation to Copilot implementation, 67% of frontline practitioners responding to the survey reported having received basic training and 33% were unaware of any training available. None reported receiving detailed or ongoing training. Most respondents felt that their confidence in using Copilot had increased, though 71% attributed this to self-directed learning.

The Copilot lead in one LA also works closely with digital / IT leads to ensure tailored use of Copilot in different settings. A structured onboarding offer covers prompts, ethics and human reviews of content. There was some awareness of emerging online national training resources, but most participants felt unclear where to find this.

One LA participated in 'prompt / agent – athon' workshops to develop new uses and operates an innovation group that creates new agents. Others share links to micro learning opportunities online. Two regions advocated for the idea of 'train the trainer' models spreading across Wales to build capacity and understanding.

A key message emerging from almost all contacts is the need for role and discipline specific guidance and training, set within the context of specific teams and use cases. Because the tool is so broad, practitioners need advice and support to get the most from its abilities in practice, rather than access to a generic training resource which will only cover the bases. There was broad support for a use case and agent central database, although a couple of leads did note that this would require a form of quality control to ensure safety and efficacy.

In summary, there is no clear 'one size fits all' model when using Copilot in practice in (adult) social care. Each team and user will have their own needs and processes, and tailored approaches are required to get the most from the technology.

Technical Considerations

Selection of Most Appropriate Tool

Tools such as Magic Notes are created with limited, specific purposes, and complete these tasks quite well. They require less training and are simpler to use in practice. For some LAs, Magic Notes presents a simple solution to administrative functions (note taking for example), while simple

redaction tools are reported to do a better job of that task. However, there is a risk of rising expenses with the need to purchase multiple AI tools for different functions.

Microsoft Copilot is a tool that is broader in scope with more applications, but it requires a higher level of user skill and training to use effectively. It offers potentially greater benefits to those who use it across a variety of functions. Some LAs report that senior managers have been able to get a lot of benefit from Copilot, using it for more strategic and research-based tasks, rather than more operational, administrative ones. However, other LAs shared that their social work / frontline practitioner teams have been reporting very favourable outcomes from using Copilot.

Level of Licence

Some councils have widely upgraded to more costly Microsoft E5 licences, while others remain on E3 level licences, or feel that the standard licence (without additional fee) is now comparable in functionality to E3 as the technology develops. There are regular updates and changes at different levels which make it difficult to keep track of their abilities and to apply those in social care settings. This makes selecting the right level of licence for individual teams / staff members an ongoing challenge.

It is therefore important to consider why and how each registrant might use the tool – it is not always necessary to purchase the higher-level license to get the functionality needed. This is an important consideration for LAs given budget constraints and their impact on innovation and rollout. It was suggested that the development of a matrix setting out how and when each version could be used would be helpful guidance to assist LAs in making decisions or setting out their criteria for future users to apply.

Data Infrastructure Challenges

Some LAs are updating or migrating their case management systems (from WCCIS to MOSAIC, OLM or Eclipse for example) and have prioritised these very large digital shifts over smaller decisions about AI tools due to the impacts on staff and amount of work required to facilitate the changes. Some participants expressed that Copilot has not quite lived up to expectations with regards to how it interacts with SharePoint around data analysis.

Limitations around Microsoft interaction can also affect the ability of Copilot to deliver on all aspects – for example, MS Teams voice recognition is still weak, particularly for in person meetings. One major challenge for Welsh speaking regions is the ongoing struggles for MS Teams to capture Welsh language accurately – there have been some improvements, but it is not felt to be reliable which has led to at least one LA opting out.

Clarity around National Infrastructure

Digital leads expressed the view that there is too much complexity around national governance and infrastructure regarding digital developments, and have observed a lot of duplication in activity and confusion around which organisations support the implementation of new technologies. They noted that clarity on this would be helpful to navigate the digital landscape in Wales.

Workforce Culture and Ethical Considerations

One of the key findings of this review was the impact that organisational culture has had on the approach to implementing Copilot in practice. Where Digital Leads, managers and practitioners work well together, there is far more rapid progress and more positive outcomes are reported. Where these functions are more siloed in the organisation, participants report frustrations with

overcoming governance hurdles and being prevented from moving forward, as expressed below:

We are all ready to go, but senior leaders oppose AI so we have not been able to move forward.

We have repeatedly requested licences but have been 'blocked' by IT because there is not enough evidence.

One LA has a very well-functioning team including an appointed AI lead, involvement of digital leads, managers and a champions group, who work with practitioners to expand the use of Copilot. This has led to widespread usage and high confidence in using for a large number of tasks.

Considerations about ethics, professional judgement and practice were common concerns raised during the focus groups during Phase One. These themes are explored below reflecting current LA views.

Accuracy

As per the recommendation in the first report, all LAs interviewed shared that they encourage 'human in the loop' checking of any AI generated content, to check its accuracy. Several participants noted that errors do occur, and that Copilot can sometimes confabulate when seeking information that is hard to access, for example inserting information from documents outside of the ringfenced request. It is particularly important that checking content remains a key expectation of employees using AI tools.

Professional Identity, Practice and Copilot

Two participants in the review expressed concern about the impact of AI technology for new university graduates, who may have used it throughout their studies to support their work. Some older practitioners remain fearful that the use of professional judgement may be weakened if overly reliant on Copilot and other AI agents to support decision making and reports. There was a suggestion that the curriculum should include the responsible use of AI to support critical thinking.

This view is supported by research undertaken by Social Work England⁵

The need to equip social work students and apprentices for a fast-changing professional context should be a key consideration in social work education and training. However, survey responses indicated 86% of social workers that graduated in the past 5 years did not receive any specific preparation on using AI in social work practice during their education and training.

However, the majority of respondents to this review expressed that when used properly, Copilot can be a helpful tool in professional practice, rather than replacing human judgement. Most survey respondents stated that Copilot was compatible with and aligned to their professional values.

The majority of respondents report using AI as a tool in practice, rather than to replace roles. However, one LA did note that they have been able to reduce the number of administrators required in Children's Services through using Copilot and not replacing vacant posts. Though this has impacted on the workload of remaining administrators, it was expressed that volume of work remains manageable due to improvements in efficiency through using Copilot.

⁵ Social Work England (2025). The Emerging use of Artificial Intelligence in Social Work. [Online]. Accessed at: [The emerging use of Artificial Intelligence \(AI\) in social work - Social Work England](#) 12 March 2026.

Rather than negatively impacting professional identity, practitioners from focus groups report that the use of Copilot has enhanced their practice by supporting with menial tasks and freeing up time for more highly skilled, person-centred ones. Key benefits highlighted included:

“Spending more time with the individuals I support.”

“It makes things a lot easier overall.”

“Being able to have more time to spend on other tasks than admin.”

Perception of AI usage

During interviews, most LAs who are using Copilot reflected that levels of concern and scepticism about the technology amongst staff have largely reduced since introducing it and that users have developed more confidence and familiarity after putting it into practice. Those LAs who have not implemented Copilot or who have adopted a very restricted cautious approach to it tended to reflect more ongoing concerns about ethical considerations.

As expressed by authors of the Generative AI report⁷,

It is essential to ensure that AI complements rather than undermines relationship-based and value-led practice, and augments rather than automates social work decision-making.

Evidence and Impact

A key consideration is the development of a robust evidence base to support the claims of improved efficiency and quality due to Copilot. Several participants noted that they do not yet have confidence that there is sufficient data to support their business case towards wider scale adoption. There is some scepticism towards vendor-produced content advocating Copilot benefits, and it was noted that more specific tools (like Magic Notes) have better evidence because of their narrow scope of operation, facilitating easier measurement of impact.

Despite this, several LAs have been capturing the impacts of Copilot through their pilots and implementation and are happy to share their findings more widely. Three case studies are shared in Appendix A, sharing evidence collected.

Key identified benefits of Welsh LA evaluations include:

Quality and Accessibility

Many LAs report improvements in quality of written work. Copilot is also being used to present information in more understandable formats for individuals with additional learning needs and people who are neurodiverse, improving accessibility. One LA survey of 50 Copilot users found that 86% of social care practitioners perceived quality improvements in their work.

Workforce Wellbeing

Reductions in administrative burden are improving morale, and there is some early evidence that those using Copilot report better work life balance and improved wellbeing. Staff have reported having more time to take breaks, reduced stress, and less time spent “catching up” on paperwork outside of working hours. One LA survey found that 75% of social work Copilot users felt more positive about their role and more than 50% reported improved wellbeing.

Some staff are reporting that they have time to eat lunch for the first time in years

Efficiency and Capacity

There have been some quantitative measurements undertaken in LAs to support time saved. This includes one LA asking staff about time savings per month. 35% of respondents suggested they are saving over 7 hours per month, while 52% estimated between 1 and 7 hours per month of time saved. Using a conservative minimum of 2h per month saved, the council estimates they would have capacity gains of at least 36,000 hours p/a (£849k) if Copilot was deployed across a quarter of the Council's user base. However, following that finding, the LA started using Magic Notes and now feels the benefits from Copilot are more conservative.

Copilot users describe significant reductions in turnaround times for tasks like note taking, which might have previously involved several days of an administrator's time but now takes less than an hour to accuracy check. Improvements have also been noted in the time it takes to produce chronologies, to create reports and to draft complaint responses, quickly locating relevant information to inform replies.

In phase one, frontline practitioner focus groups identified the tasks that they find most time consuming – these included case recording, writing and reviewing assessments, handling correspondence and writing care and support plans. The frontline practitioner survey this year identified that the majority of those using Copilot feel that the above tasks *'are easier and less time consuming'* when using the technology.

For frontline practitioners in the survey who identified as delivering direct care, all report now having more time to spend with individuals owing to time saved from Copilot.

Some comments from practitioners about the impact on practice are found below:

"It's helped me do paperwork much quicker... sometimes after a long day even writing a complex email is difficult and it helps with simple tasks like that."

"I am able to search for specific information and also key highlights of documents and legislation."

"Concise notes and assessment reports, linking back eligibility to legislation"

"It has helped with my own CPD activity."

For Copilot users, early evidence suggests that the tool is used frequently (61% of people used Copilot on a daily basis in one LA, while another LA tracking usage found that only 10% of licence holders were not using Copilot regularly). 97% of people using Copilot in one LA reported that it had been somewhat or extremely helpful in carrying out daily tasks.

Three LA case studies are shared in Appendix One, highlighting early impact findings from staff surveys of those using Copilot.

Shared Learning

It was noted that there is not a lot of sharing about Copilot learning happening across Wales. Though LAs undertake informal conversations with neighbouring authorities or sometimes share ideas when coming together in meetings, participants felt it would be beneficial if national bodies sought to capture learning somewhere central, both in terms of use cases for Copilot as well as

findings that support the evidence base.

One LA noted that they are piloting Most Significant Change interviews to capture the qualitative impact of using Copilot across different roles. Another is process mapping specific tasks like conferences and handwriting workflows to measure how Copilot is affecting the time taken to undertake these activities.

Key benefits highlighted in one LA evaluation suggest that Copilot:

- Speeds up decision-making by summarising information and data
- Improves consistency and professionalism in written work
- Helps staff work under pressure and move on to the next task faster
- Makes finding information quicker across emails, files and SharePoint
- Supports planning and problem-solving, including rotas, processes and workflows
- Frees up time so staff can focus more on people not paperwork

Evaluation results have been limited by relatively small numbers of licences being used across LAs (between 20 and 500 licences, not always with high concentrations in social care teams).

Review participants noted that national bodies could support the evidence base by developing:

- Standardised evaluation frameworks
- A centralised evidence hub
- Shared case studies
- An agent and prompt library

In summary, there is some emerging evidence of positive impacts on social care practice in Wales, though this has been difficult to capture due to the broad nature of Copilot functions when compared to other more specific tools.

Barriers and Challenges

Funding and Evidence Base

Purchasing licences at scale is expensive, and beyond the budgets of many LAs. Without clear evidence of cost savings, it has been challenging to move from pilot phase to implementation. The standard version of Copilot included with Microsoft Office is increasingly being used rather than paying for higher licences. There is some evidence that this is sufficient for most frontline staff.

Risk tolerance

LAs differ in their approach to risk around the use of AI technology. While many have boards in place made up of people from different roles, other LAs are governed by either senior leadership or IT policies, which can be either risk averse or very permissive depending on people in post and specific LA approaches. This directly impacts on whether and how Copilot is deployed.

Public Perception

Several participants expressed concern about public perceptions of AI – there have been instances in which members of the public did not wish to be recorded in meetings due to a distrust of AI,

though this seems to be the exception rather than the norm. A [report by Nesta](#)⁶ identified that the public generally feels positively about AI, however they expressed the need for informed consent to be sought when it was used, and for human oversight of content to avoid mistakes – both from the practitioner and the person whom the content concerns. None of the LAs consulted noted asking people accessing support to check the documents, which is something to consider.

Most LAs provide a disclaimer when recording meetings as to the intended purposes of the activity (to support minute taking for example) and normally do not have issues.

There was a suggestion that clear plain English explanations and communications to the public about AI and its use in social care would help to support the transition to using the technology, especially where promoted by national agencies.

Governance

The majority of practitioners from focus groups shared that there is a lack of guidelines and policies around Copilot use in their LA, which can cause concern about professional practice or safe usage. Managers and senior leads identified more guidance available locally – suggesting a possible awareness issue and need to clearly communicate policies to staff. However, not all LAs have developed their own documentation around the use of AI or Copilot specifically.

Working across agencies can be problematic when there are differing policies on AI usage (for example, police and probation services, health and LAs often have different rules around how and when Copilot can be used which is challenging in multiagency meetings).

There can be a mismatch between data protection / retention policies and standard Microsoft settings, which could lead to differing standards across LAs or in worst case breaches of legislation.

Licensing Options

Licensing is a major area of confusion and cost pressure. Authorities requested a national “who needs what licence” matrix for different roles and/or tasks, given uncertainty between free Copilot, Copilot Pro, Copilot for M365 E3/E5 and other transcription tools, though some noted this may quickly become outdated.

Training

Challenges with releasing staff to undertake training and a lack of tailored, suitable training were highlighted as primary challenges. Some participants expressed a desire for ongoing support with using Copilot and staff needs with regards to their confidence to try new prompts varied. Many LAs identified that they are using a ‘learn by doing’ approach rather than providing formal training beyond basics around safe usage.

Technical limitations

Infrastructure issues such as the interface with some case management systems and LAs prioritising larger digital projects like CMS migration sometimes delay or prevent using Copilot.

Copilot sometimes has quality issues when using with Microsoft teams, such as Teams audio

⁶ Berditchevskaia, Peach and Moss. (2025) How does the public feel about social workers using AI. [Online] Available at: [How does the public feel about social workers using AI? | Nesta](#) [Accessed 10 March 2026].

quality (particularly for in person meetings), and Welsh language limitations which are particularly relevant for LAs with high numbers of Welsh speakers.

Staff Digital Capability

Confidence and skills in using Copilot vary, and because of its broad application, it can be less intuitive and user friendly than smaller more focused tools that do fewer tasks (such as Magic Note)

Use in Legal Proceedings

There remains some lack of clarity around use in court settings and acceptability of AI generated evidence as well as capacity and consent issues, and in some instances data sharing between organisations is complicated due to differing policies. A recent report⁷ by the British Associate of Social Workers (BASW) highlights these ongoing concerns.

While finding many benefits, such as time saved, it also highlights a risk of bias, “hallucinations” and “unpredictability potentially leading to harmful misrepresentations”.

Such risks “aren’t being fully mitigated” by employers and policymakers, leaving frontline workers to “navigate these challenges on their own.. social workers could face professional or legal repercussions for inaccuracies that stem from the transcription and summarisation functions of AI transcription tools”

This research highlights the importance of social worker having clear guidance and support around appropriate AI usage, and carefully checking AI generated content for inaccuracies. The ‘AI in Law’ project being undertaken will support clarity in this area.

There are differing views amongst LAs about the appropriate use of AI in different contexts – some are comfortable with it being used to support Mental Capacity Assessments for example, while others restrict its use to administrative functions.

Pace of Change

Many review participants expressed concern about keeping up with the pace of change. Staff in LAs that are not yet using Copilot report feeling left behind, and those without licences may also feel excluded where there are limits on numbers and only some colleagues receive them.

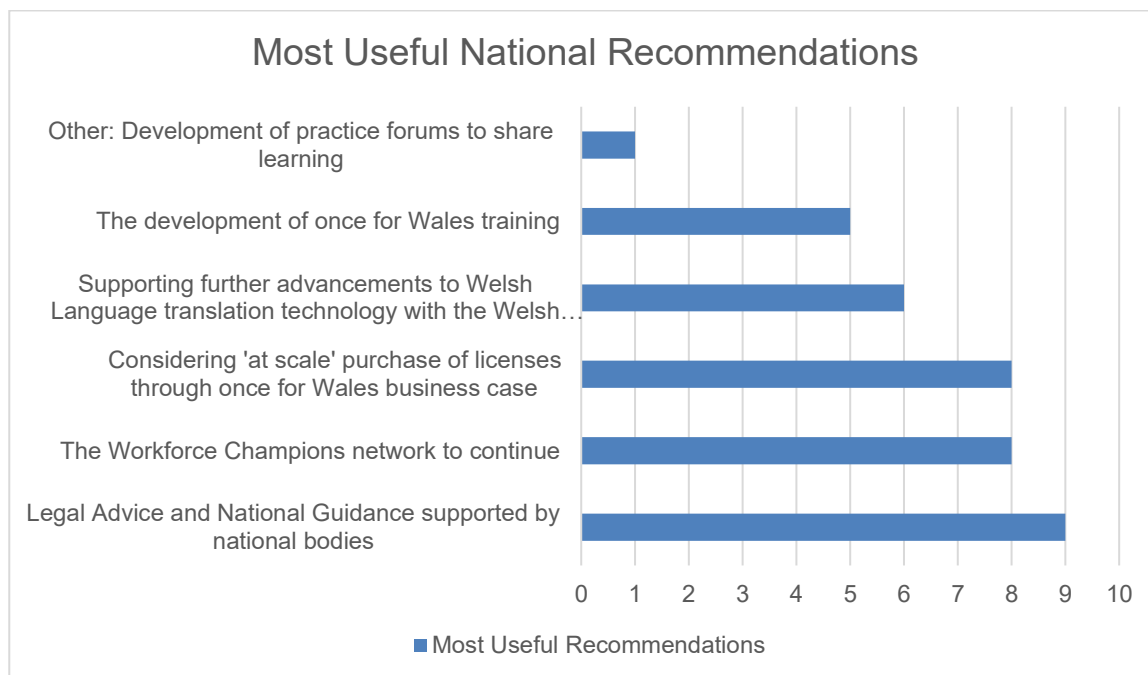
Enablers

National Enablers

The recommendations made in the phase One Copilot report were discussed as part of this review. Survey participants were asked which of the recommended national approaches would be most useful for their LA. The results are illustrated in Chart 4:

⁷ The Ada Lovelace Institute. (2026) Social workers at risk of legal action over AI inaccuracies. [Online] Available at: [Social workers at risk of legal action over AI inaccuracies | BASW](#) [Accessed 12 March 2026].

Chart 4: Most Useful National Recommendations, Rated by Participants



The review produced a number of clear themes about how national organisations could assist LAs

Guidance and Legal Advice

The strongest theme was a desire for support from national organisations around legal advice and the production of national guidance which came through in all interviews and was most selected in the survey. It was felt that there needs to be more clarity around expectations and legal matters to support greater adoption and to understand the view of national bodies on using Copilot (and AI more widely).

There are some emerging pieces of guidance that exist for example the Social Care Wales [AI Guide for Social Care in Wales](#)² and BASW reports but awareness of these resources is limited and participants note it is spread across many different websites / groups, making it hard to navigate.

The Welsh Government has also published a resource⁸ detailing their role in supporting AI's use in the public sector.

National Champions Network

While the majority of participants supported a continued champions network, they cautioned about the volume of groups and networks emerging in this space across organisations. It was felt that a wider AI focus would be more valuable than a specific Copilot group.

There was currently no clear place for shared learning, though digital leads noted they do come together on a national basis in other forums quite regularly.

⁸ The Welsh Government (2025). AI: What we're doing to help ensure AI is used responsibly and ethically in the public sector in Wales. [Online] Available at: [Artificial intelligence \(AI\) | GOV.WALES](#) [Accessed 3 March 2026].

Shared Learning

There was widespread support for the creation of a central evidence base collating findings from the many pilots and evaluations that have taken place, and it was felt national organisations could play a role in analysing and presenting evidence to support LAs in making business cases where there are potential cost savings.

Similarly, the creation of a one stop place where agents, use cases and prompts could be shared was welcomed – though with caution that this would need some form of quality control to ensure appropriate usage.

There was less support for once for Wales learning, largely owing to the fact that it was identified training needs to be tailored to team and user and provided on an ongoing basis.

Procurement

Participants noted the duplication in effort of each LA purchasing licences from providers and suggested the development of a procurement framework or 'once for Wales purchasing of licences would support easier to navigate. There is currently a discovery project underway called 'the Big Change' which is exploring the potential options around procurement.

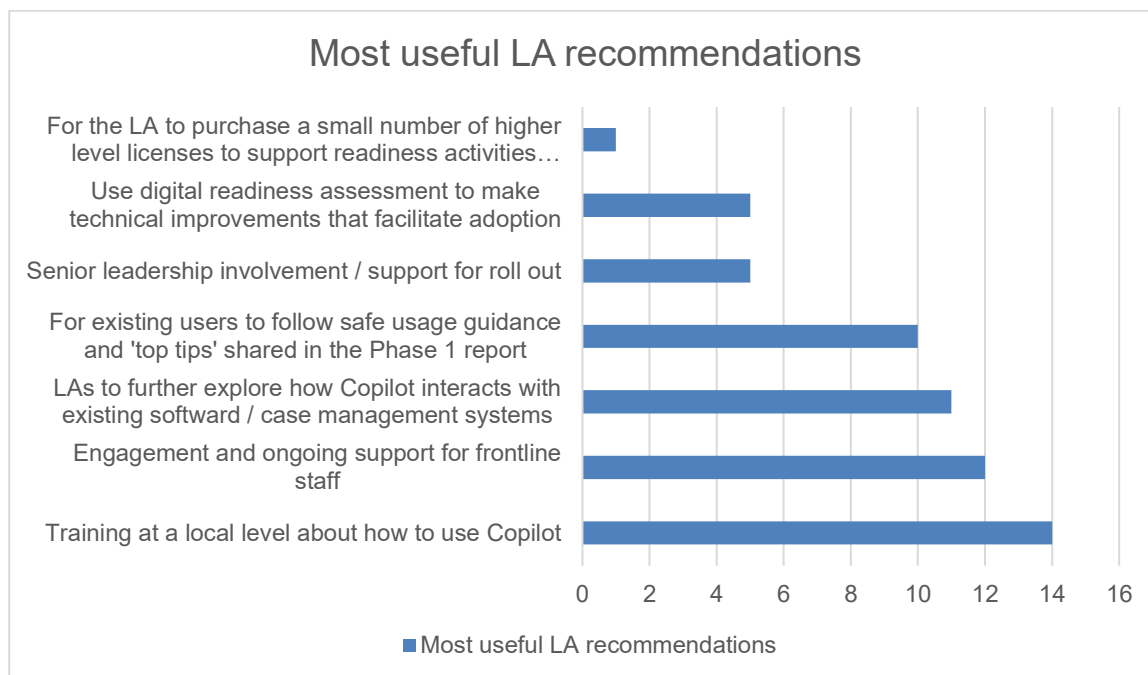
Up to date information

Digital leads feel confident in using the settings and features of Copilot, but find it difficult to keep pace with rapid changes in functionality and differences between licences. While there are regular meetings with suppliers, leads sometimes express concern that the primary aim of suppliers is to increase sales – it has been suggested that having unbiased national guidance on the latest capabilities for various AI tools would save a lot of time and be more reliable to inform decision making.

LA Enablers

The recommendations made in the phase One Copilot report were discussed as part of this review. Survey participants were asked which of the recommended approaches would be most useful for them at a LA level. The results are illustrated in Chart 5:

Chart 5: Most useful LA recommendations, Rated by Participants



The majority of respondents felt that a local approach to training was best, along with ongoing engagement and support for frontline staff about Copilot usage in practice. There was support for the safe usage guidance and top tips produced in the phase one report, and an emphasis on further exploration of how to support interaction between Copilot and other CMS.

Throughout the review, several themes about 'what works' emerged:

Multidisciplinary approaches

Those LAs who work across departments have the strongest outcomes. Where digital leads are working with managers and practitioners to customise the use of the tool there is broader use and understanding about Copilot. It is more likely strong views by any one senior lead will be balanced when everyone is working together.

In one LA, Digital leads produce training together with practitioners to ensure it is tailored to service needs.

We made sure that we worked together to make sure that the training was applicable, because it's not always, you know, and in the right language, we speak within technology, we speak our own language, we assume a level of understanding

Dedicated Leads

Those LAs who have a dedicated post for Copilot / AI implementation are further ahead and offer stronger ongoing support to users of the technology. LAs with strong senior leadership support for Copilot were much more likely to have posts around digital innovation and transformation activities.

Targeted Investment

Those LAs that employ systems to govern who receives licences at different levels have been able to manage purchasing in a way that leads to cost savings. Many LAs have noted the increasing capabilities of the standard Copilot mean that it is often enough for most frontline users. Those who use its broader functions such as senior managers benefit from higher (E3) licences, while technical digital leads require the highest (M365 E5) licence to ensure monitoring and data

protection settings are optimal. Individual 'super users' may also require higher licences. Some LAs ask individual service areas / teams to cover the costs of licences, and monitor usage, with those not using the tool having their licence reallocated.

Collaboration

Some LAs have been meeting informally to share information amongst themselves, which has supported learning and encouraged wider adoption. However, participants in some LAs feel isolated and behind the curve where their LA is not moving forward at the same pace.

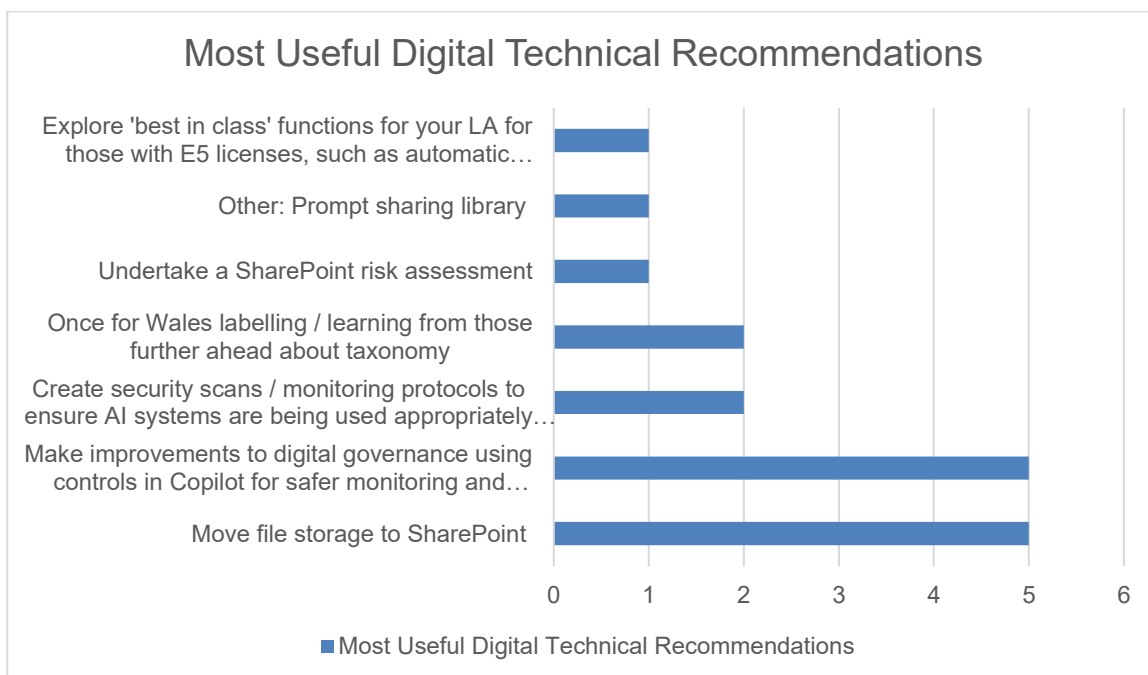
LAs that encourage Copilot users to work together to innovate and experiment have more positive results:

They've created a peer group and they've shown people what the prompts that generate the best kind of content for the assessment you are looking to do. That sort of idea that actually we use practitioners to teach other practitioners how to get the best from copilot, because that isn't an expertise that ICT have, that is practitioner expertise.

Technical Digital Enablers

The survey asked digital leads to rank which of the Phase one recommendations was most beneficial. Results are summarised in Chart 6:

Chart 6: Most useful digital technical recommendations, Rated by Participants



Digital leads strongly support moving to SharePoint for best functionality and using Copilot controls to ensure safer usage and monitoring through changes to settings that they enact. There was less support for the 'best-in-class' higher functions or shared approaches.

This theme was echoed in many interviews, where digital leads felt it best to be able to customise Copilot usage based on local needs and preferences, rather than shared approaches.

Conclusions

There is widespread adoption of MS Copilot across LAs, though other AI applications are also popular, with technology constantly evolving and maturing at a pace that is difficult to keep up with.

LAs have undertaken the implementation of Copilot with differences in approach, scale and pace. Some have applied blanket licencing across teams, while others are being very selective and limited in terms of who receives access to the tool. A couple of LAs have opted not to proceed with Copilot at all, either in favour of alternate AI tools, or due to blanket policies prohibiting its use. There is a need to match the right tool to the right role.

Those LAs that have a multidisciplinary team approach and dedicated leads have had more success with using Copilot and have collected stronger evidence of impact than those who have employed a more ad-hoc approach. LAs that encourage innovation and experimentation use wider Copilot functions than those that restrict the agents / prompts that practitioners use.

There is an emerging evidence base for positive impacts on workforce wellbeing, time savings and efficiency with undertaking tasks, leading to spending less time on administration and more supporting people. This learning has not been collated centrally and is largely not being shared between LAs, leading to a perception of there being little credible evidence to support wider roll out.

There are mixed views about the effectiveness of Copilot with different groups of practitioners and in different teams, with some LAs advocating the benefits to social workers, others to administrators or senior managers, and others using different AI tools such as Magic Notes for functions like administrative tasks. There is no 'one size fits all' approach about what works in practice.

The primary ongoing barriers to Copilot implementation include funding, risk tolerance, governance, technical limitations, training time, and the pace of change. Barriers can be mitigated through rationing higher level licences (the standard one is often enough), monitoring advancements and limitations in function, and ongoing communication with users and the public about the benefits and limits of the technology.

Enablers to Copilot implementation include multidisciplinary approaches, dedicated programme leads, targeted investment and collaboration between LAs. Tailored approaches to usage at a LA, team and user level based on service needs also ensures that the best is obtained from the tool. Clear messaging around acceptable and ethical usage as well as compatibility with legal and practice frameworks is essential.

The suggested role of national organisations in supporting LAs includes providing clear guidance and legal advice, facilitating a national AI network, and collating evidence and learning to a central place, to inform decision making. Clearer communication around governance would improve understanding, as most feel the national approach to AI is very fragmented and difficult to navigate, leading to duplicated efforts and a lack of awareness about where to get information.

Welsh LAs are making clear and rapid progress in exploring AI-enabled tools, with strong enthusiasm and emerging benefits across both operational efficiency and staff wellbeing. However, progress is uneven, and risks are amplified by inconsistent governance, unclear national guidance, and significant variation in readiness.

When used cautiously and critically, there are both identifiable benefits and limitations to incorporating AI tools and platforms into social work practice. While it has potential to act as a cognitive resource, its impact on individual practice, in terms of influence, cognitive over-

reliance and skill erosion has not been adequately explored⁹.

A coordinated national approach—supporting governance, legal clarity, shared learning, training and procurement—will help to maximise benefits, ensure consistency, and build confidence for both practitioners and the public.

Recommendations

For national organisations to:

1. Facilitate a National AI Champions Network

Collaboration: To facilitate a national AI Champions Network, supporting innovation, shared learning and understanding of the evolving AI landscape. It was suggested that targeted themed sessions will ensure those who have interest attend the most appropriate micro learning opportunities, rather than the group becoming a broad ‘talking shop’. A focus on areas of practice (such as responding to complaints or supporting care plan development) rather than a focus on specific tools is essential, because LAs are using different tools for these functions.

2. Develop a central learning hub and evidence base

Learning: To collate learning and use cases through a central evidence base. To provide analysis of themes coming from LA evaluations and impact assessments in support of making the case for continued investment, where warranted. To share developing agents and prompts with a degree of quality control to ensure safe usage. To share clear communications with the public about AI and its use in social care in Wales. Work is currently underway under through the Welsh Government Office of AI to evaluate the different transcription tools being used in social care— this is currently in Discovery phase with the report due at the end of March. Findings will inform this recommendation

3. Provide guidance and legal advice

Guidance: To develop guidance and to provide legal advice about the baseline standards expected from LAs with regards to AI and Copilot use, and its applicability in specific legal settings like court proceedings. To develop a matrix illustrating the differences between different levels of licence in specific social care scenarios, and to keep this up to date to inform LA decision making. The Discovery Project ‘AI in Law’ is reporting to the DiSC Bright Ideas pillar – it will help to clarify the acceptable use of AI in Court Settings to support social care practitioners who have to produce documentation for the Justice System. It will examine what the Justice systems says and case law findings. It will assist with the understanding of what is or could be permitted and to provide guidance for SCP’s on how to use AI tools to support their work and meet Justice requirements. It would be helpful if a representative from ADSS Cymru could link into this project to ensure that social care operational challenges are included in this work.

⁹ Gillon, Fern and Weaver, Beth. (2026). Generative AI, critical thinking and social work practice. [Online] Accessed at: [Generative AI, critical thinking and social work practice | Iriss](#) 12 March 2026.

4. Promote consistency across public organisations

Consistency: To work towards multi agency collaboration and consistency with regards to the use of AI tools in public services across health, social care, police, education and probation. To support cross-agency agreements about the usage of AI in complex settings such as MARAC meetings or child protection conferences.

In consideration of existing good practice and guidance in development across Wales, the following recommendations are considered - For LAs to:

1. **Assign a programme lead(s)** to oversee innovation and system transformation with Copilot / AI tools, and to ensure strong governance is established alongside the development of comprehensive guidance and policies on its use.
2. **Use multidisciplinary approaches.** To ensure that Digital leads, HR and workforce development teams work with social care managers and practitioners to implement Copilot / AI tools into practice and tailor its usage in different settings and roles
3. **Purchase licences strategically** based on need, being mindful that the standard licence is often enough, while those using broader functions will require the higher licence.
4. **Offer ongoing support and training to staff** using Copilot, and monitor usage to ensure safety and efficient use of purchased licences. To ensure that AI training forms part of annual training needs assessments and links to workforce plans in LAs.
5. **Evaluate impact to establish an evidence base** for what works and learn from other authorities through shared learning and collaboration

Appendix A: Case Studies – The Emerging Evidence Base

CASE STUDY ONE: RHONDDA CYNON TAFF
Use in Practice
<p>Adult Services – 350 licences enabled , 10-15% not using currently</p> <p>Survey undertaken and had over 50 responses, half the targeted pool for the survey.</p> <ul style="list-style-type: none"> • Risk Assessments • Needs Assessments • Care Plan Creation • Reviewing Case Notes • Mental Capacity Assessments • Preparing reports • Summarising information • Writing emails <p>Staff are developing new prompts regularly – enabled staff have training and centralised resources multi-media on how to develop their own</p>
Wellbeing
<p>Half surveyed indicated that Copilot improved their wellbeing</p> <p>75% felt more positive about their role</p>
Time Savings / Effectiveness
<p>86% of survey respondents report improved quality.</p> <p>Range of time savings identified across all use in practice use cases listed above.</p>
Training
<p>ICT led training session for all developed in conjunction with Adult Services</p> <p>Covering ethics, building prompts, human in the loop and accountability</p> <p>Digital adoption team and ongoing project support</p> <p>Encouraging experimentation and development, participate in joint Microsoft prompt-athon / agent-athon events and future events are planned.</p>
Planned Approach
<p>Pilot for sizeable cross-section of teams within adult social care (and more broadly branching across the Council for use case evaluation and defined use cases)</p> <p>Using CoPilot M365, CoPilot standard / E3 / Teams Premium level licenses, needed to get use cases and outcomes for toolset in order to assist deciding who receives each level</p> <p>IT Adoption working with Digital Heros from SW frontline. Workshops, Team Meetings, 1:1 support, considering use cases and new uses</p> <p>Working across departments together on finding new uses</p>

Used with SW first, moving on to Single Point of Access teams, risk assessment, direct services and OTs etc (wider rollout underway)

User Views on Copilot

Mostly positive but some staff needing additional support
Continuing to at use cases outside of social work

CASE STUDY TWO: CONWY

Use in Practice

Survey Sample Size = 40

- Creating documents
- Transcribing meetings
- Research
- Updates from email/files
- Summarising data

Wellbeing

Time saved supported more effective working

Time Savings / Effectiveness

Based on feedback of users at the time survey undertaken, at least 36,000 hours p/a (£849k) could be saved if deployed across a quarter of the Council’s user base – the equivalent to equivalent 18 FTEs (assuming 2h per month time saved). However, as of now uptake from services is limited and still sits below 100 full licences – which means capacity gained hours are at 6000 / £149k (about £30k costs) so this information needs to be used with caution

35% of those surveyed noted over 7h time savings per month

52% noted between 1-7h saved per month

It should be noted that these results:

- Are an estimate based on feedback from the willing Copilot user group, including mostly professional / senior roles such as managers, finance officers, secretarial support, engineers, social work support
- The survey predated Magic Notes and other AI tools which the LA is in the process of rolling out for transcription / summarising tool. It is anticipated that Magic Notes will have a substantial impact on practice which would reduce Copilot benefits and is currently superior for these functions.

Training

44% completed on site training day, 38% self-trained online, 17% had no training

Planned Approach

Offer licences to services on request, with usage reviewed every 6 months / licences removed

<p>where not being used</p> <p>The recommendation of rolling out across 25% is not going forward now that the free version is available / other AI tools being considered.</p> <p>WF&OD work with IT to develop a 1 day training course, running 1-2 per month for up to 10 people</p> <p>Overall, there were some benefits, however there is also strong evidence that other AI products offer scope for much higher capacity gains given recent experiences and that Copilot may not be the best longer term product. Services can continue to purchase licences but there are not currently plans for large scale role out of the tool.</p>
User Views on Copilot
<p>At the time of the survey:</p> <p>97% found Copilot somewhat or extremely helpful for daily tasks</p> <p>61% used on a daily basis and further 37% on weekly basis</p> <p>Experience has been that Copilot is a great broad use tool, however some AI products do better at specific tasks while Copilot does not stand out on any particular area at present.</p>

CASE STUDY 3: CARDIFF
Use in Practice
<p><i>Copilot is mainly used as a writing, summarising, and organising tool.</i></p> <p><i>It supports staff to:</i></p> <ul style="list-style-type: none"> - Draft and structure Mental Capacity Act work, especially where information is complex. - Summarise background information and turn rough notes into clearer written text - Support supervision notes, reflections, and follow-up actions after supervision discussions. - Draft emails, reports, meeting summaries, and minutes. - Produce first drafts of court related documents, which are then checked and refined by practitioners. - Find and summarise policies and guidance across emails, files, and SharePoint. <p><i>Copilot is not used to make decisions.</i></p> <p><i>Professional judgement, accountability, and final sign-off always remain with staff.</i></p>
Wellbeing
<p><i>Copilot has been particularly valued as a reasonable adjustment.</i></p> <p><i>Staff report that it:</i></p> <ul style="list-style-type: none"> - Helps reduce cognitive load on busy or pressured days. - Supports colleagues with dyslexia by improving spelling, structure, and clarity. - Helps some autistic staff adjust tone in emails and reports. - Allows staff to check work before sending, increasing confidence. - Many staff said this made them feel more confident and more included at work.
Time Savings / Effectiveness
<p><i>Staff consistently report that Copilot:</i></p> <ul style="list-style-type: none"> - Saves time on emails, reports, minutes, and paperwork. - Reduces the admin burden, particularly around summarising information.

- Produces strong first drafts that can be quickly reviewed and improved.
- Improves consistency and professionalism in written work.
- Helps staff move on to the next task more quickly on busy days.

Most staff say:

- It saves time and helps a lot.
- They would miss it if it was taken away.

Care Packages – Important Clarification

- Copilot is not used to design, approve, or decide care packages.
- Staff report it helps with the administration around care packages, for example:
 - o Organising notes and information.
 - o Summarising assessments.
 - o Supporting clearer written explanations.
- Decision-making remains entirely with practitioners and managers.

Training

One day training session offered

Planned Approach

Services can purchase licences – at M365 E5 fully accessible level

Also using Magic Notes

User Views on Copilot

Safeguarding team particularly like it

Managers report finding Copilot very helpful

Benefits noted across social work teams, back office & admin staff, people doing complex mental capacity work and court work also found it helpful

Challenges of Copilot

- need to check for errors
- Translations sometimes wrong
- need more simple training

Issues haven't stopped people using the tool