



Practical AI for School Leaders: The Field Guide

What the tools actually do now, and how to put them to work in the central office

A field guide written by a former superintendent, covering what these tools actually do in the middle of 2026 and how to point them at the work that sits on your desk.

A Willow Run Group field guide for superintendents and central office leaders.

What This Guide Is

You already know AI is in the building. You have sat through a presentation or two, watched a board member forward you an article, and probably tried a tool yourself on a parent letter that came out fine. This guide is not the pitch. It is written by a former superintendent for the people running districts, and it covers one thing: what these tools actually do in the middle of 2026, and how to point them at the work that sits on your desk.

Here is the honest state of things. The tools crossed a line in the first half of this year. A year ago the mental model was a chat window: you typed a question, it typed back, you copied the useful part. That still works, but it is no longer the frontier. The newer products work over folders of your real files, take a whole job instead of a single question, run for a stretch on their own, and let you save a piece of work so you never have to explain it twice. That shift, from a bot you chat with to a system that does work, is what most guides written before this spring miss entirely.

How to use this: read it once for the full picture, then come back to the section that matches what is actually on your plate this week. Every section stands alone. You do not need to work through them in order, and you do not need to try everything. One real task, done well, teaches more than a month of reading.

01 Where AI Actually Is Right Now

Start with adoption, because the numbers settle the "is this real yet" question. As of the first quarter of 2026, 50 percent of employed U.S. adults reported using AI in their role at least a few times, up from 46 percent the prior quarter, and the figure has more than doubled over three years (Gallup, survey fielded February 2026, n=23,717). Thirteen percent use it daily, 28 percent weekly or more. This is not a pilot anymore. It is a working majority.

Your own sector moved just as fast. In a national survey of school leaders, 97 percent said they had personally experimented with AI, but 69 percent said their district still had no formal AI policy (SchoolCEO/Apptegy, November 2025). Governance is catching up: the share of districts with no AI guidelines at all dropped from 43 percent in 2025 to 21 percent in 2026, so roughly four in five districts now have something written down (RAND and the Center for Democracy and Technology, survey of 600-plus K-12 technology leaders across 44 states, May 2026).

Now the number that matters most, because it names the actual opportunity. Among employees at organizations that have adopted AI, only about one in ten strongly agree that AI has fundamentally changed how work gets done (Gallup, February 2026). Read those findings together and the picture is clear. Almost everyone has tried a tool. Very few people, and very few organizations, have redesigned a single workflow around one. Adoption is running well ahead of both governance and fluency.

That gap is the whole point. The districts that build real operating fluency now, while it is still early and still uneven, will make faster decisions and carry less administrative weight than the ones still treating AI as a search engine that talks. You do not close that gap by buying more tools. You close it by changing how one recurring job gets done, then the next one.

CALL-OUT

The one stat to remember. About 1 in 10 employees at AI-adopting organizations say it has fundamentally changed how their work gets done (Gallup, Feb 2026). The tools are here. The redesign is not. That is where the real gain sits.

02 The Tools Worth Knowing, Mid-2026 Edition

You do not need to master every platform. You need to know what each one does well and pick one to get fluent with. Here is the honest breakdown as of July 2026. Prices and plan details move fast, so treat the numbers as current-as-of-writing, not permanent.

Claude (Anthropic), and Claude Cowork. Claude remains the strongest general option for the kind of long, document-heavy, judgment-adjacent work a central office runs on. It handles lengthy inputs well and follows instructions precisely, which matters when you need a specific format or tone. The bigger news is Cowork, a mode that works directly inside a folder on your computer. You point it at a folder of Word, PDF, and Excel files, grant permission, and it reads, organizes, and produces new documents from what is there. It launched in January 2026 as a Mac-only preview and reached web and mobile by early July. It now comes with every paid Claude plan, starting at Pro for about 20 dollars a month. Best for: board and policy documents, document review, multi-file synthesis, and any job that lives in a folder of real files.

ChatGPT (OpenAI), and ChatGPT Work. ChatGPT is still the tool most people try first and a capable generalist. On July 9, 2026, OpenAI launched ChatGPT Work, an agent mode that sits alongside the regular chat. You hand it a goal, it connects to your apps and files, plans the steps, works on its own for a stretch, and hands back a finished spreadsheet, deck, document, or simple web page. It includes a plan-approval step and a check-in before sensitive actions. Two honest cautions. First, the name is "ChatGPT Work," not "ChatGPT for Work," and it is a different product from "ChatGPT for Teachers," the free classroom plan for verified K-12 educators. Do not assume Work inherits the Teachers plan's privacy posture. Second, exactly which subscription tier includes Work, and how well it handles a local folder, was still moving and inconsistently reported in the days after launch. What is safe to say: the desktop app is free, but the Work agent requires at least a paid individual plan or a district-purchased seat, and usage is metered per task. Verify current details against your own account before you commit. Best for: connected-app workflows, web research, and producing finished artifacts from tools you already use.

Google Gemini. Gemini's advantage is that it lives inside Google Workspace. If your district runs on Docs, Sheets, Slides, and Gmail, Gemini works right in those files with the least friction. As of March 2026 it became the default engine for most Workspace AI features on business tiers, and a "Fill with Gemini" function in Sheets can summarize, categorize, and tag data without formulas. Best for: districts already on Google Workspace, spreadsheet work, and drafting inside documents you already keep in Drive.

NotebookLM (Google). Still the most underrated tool for school leaders, and the safest place to start when accuracy is non-negotiable. You upload your own sources, policies, board minutes, strategic plans, research articles, and it answers only from what you gave it, with citations back to the source. That grounding makes it far less prone to making things up. It also generates audio summaries you can listen to on a drive. A June 2026 update added the ability to run analysis and produce charts and exports inside each notebook. Best for: policy review, board prep, and synthesizing a stack of documents into something you can actually reference.

CALL-OUT: GETTING STARTED

Pick one tool and get fluent before you add a second. For most superintendent work, that is Claude or ChatGPT for general tasks, plus NotebookLM when you are working from a specific set of documents. Use Gemini if your day already lives in Google Workspace. The entry-level plan, around 20 dollars a month, is enough to start. You do not need the expensive tier to learn the pattern.

03 The Shape of Real AI Work

This is the chapter that matters. Everything else is detail around it.

The shift from chat to agent changes what good use looks like. In the chat era, the skill was writing a clever prompt. In the agent era, the skill is running a repeatable pattern over your own material. There are four steps, and they map onto something you already know how to do: bringing a capable new hire up to speed.

Step one: give it your context. Not a description of your district, the actual files. The real board packet, the real policy, the actual spreadsheet. The tools now work over folders of documents, so stop retyping background you already have written down somewhere. This is where most people underinvest. The output is only as good as what you hand it, and a summary of your situation produces generic advice while the real documents produce something you can use.

Step two: give it a real job, not a question. "Tell me about our enrollment trends" is a conversation starter. "Read these three years of enrollment files by building and grade, flag the two buildings with the steepest decline, and draft the framing for a board discussion about it" is an assignment. The agent tools are built to take the whole job, break it into steps on their own, and work through it. Ask for the finished thing, not the topic.

Step three: review and close the loop. Read the output the way you would read a strong new hire's first draft. Check the facts, fix the emphasis, push back on what is off. The tools now ask clarifying questions when they are stuck instead of silently guessing, which is a real improvement, but the judgment is still yours. Nothing that carries your name goes out on the first pass without your read.

Step four: when a job repeats, save it as a skill. This is the newest and most valuable habit, and the one almost nobody is using yet. When you have worked out how a job should go, board memos, parent letters in your voice, the monthly finance narrative, you can save that as a reusable set of instructions, sometimes called a skill, that the tool loads automatically every future time. You write down "how we do a board report" once, and every session after that follows the standard without you re-explaining it. That is the difference between a clever prompt you have to reconstruct each time and a system that holds.

Here is the whole pattern on one real job.

CALL-OUT: WORKED EXAMPLE, A BOARD PACKET BECOMES A COVER MEMO

Context (step one): Point the tool at the folder holding this month's board packet, the finance report, the two policy items, and the personnel summary.

Job (step two): "Read the full packet. Draft my superintendent's cover memo highlighting the three or four items that need real board attention, two paragraphs each, in a plain and direct tone. Then, separately, list the questions each board member is likely to ask on the budget item so I can prepare."

Review (step three): You get a memo that is 80 percent there and a list of anticipated questions. You correct one number, sharpen the emphasis on the item you actually care about, and cut a question that does not fit your board. Fifteen minutes, not two hours.

Skill (step four): You save the memo format and your tone as a board-memo skill. Next month, you point it at the new packet and the first draft already sounds like you.

Notice what did not happen. You did not write a paragraph-long prompt. You gave it real files, a real assignment, your review, and a saved standard. That is the shape of the work now.

04 Prompting That Still Matters

The context layer and the saved-skill habit do more for output quality than any clever phrasing. But the fundamentals still hold, and they are worth keeping tight. Five elements sit underneath any strong request.

- **Role:** who the tool should operate as. "You are a district communications director writing for parents" produces different output than "you are a budget analyst."
- **Context:** the background and, better, the actual materials.
- **Task:** the specific thing that should exist when it finishes. A memo. A rubric. A comparison table. Name it.
- **Constraints:** what not to do. "Under 300 words." "No education jargon." "Eighth-grade reading level."
- **Output format:** the shape you want back. "A three-column table" instead of "some ideas."

Two techniques carry most of the weight. First, structured prompting: when a request has several parts, label them instead of running them together in one paragraph. Headers, or simple sections for context, task, and format, let the tool weigh each part correctly. A rule of thumb that still holds: if your request runs more than three sentences, give it structure. Second, and more powerful, show an example instead of describing one. If you want a parent message that sounds warm but not soft, do not write "warm but professional." Paste a message you sent last spring that hit the tone and say "match this." One real example beats a paragraph of adjectives.

Then iterate. Treat the first output as a draft, not a deliverable. The most useful move is specific feedback, not starting over.

CALL-OUT: BEFORE AND AFTER

Before: "Write a message to families about the bus route changes for next year."

After: "You are our district communications lead writing to families. Using the attached route-change summary, draft a message explaining why three routes are consolidating, what changes for affected families, and where to get help. Warm and direct, under 250 words, no transportation jargon, eighth-grade reading level. Match the tone of the attached message I sent about the calendar change."

The first returns something generic you will rewrite. The second returns something close to sendable, because it names the role, hands over the real summary, sets the constraints, and shows the voice.

05 Where It Pays Off First in the Central Office

You will feel the return fastest on work that is important, recurring, and heavy on drafting or synthesis. Start here.

- **Board communication.** Cover memos, executive summaries, and update packets built from materials you already have. Point it at the packet, get a first draft, add your judgment.
- **Community and family messaging.** The parent letter that has to go out fast, the newsletter that eats a Saturday. First drafts in minutes, in your established tone.

- **Data and finance narratives.** Turning an assessment table, an enrollment history, or a budget summary into the plain-language story a board needs. The tool handles the pattern-finding and the arithmetic; you own the read.
- **Policy review.** Comparing a policy against current state code to flag what is outdated or out of alignment. A fast first pass before your attorney's review, not a replacement for it.
- **Meeting preparation.** Briefing documents from an agenda, likely questions, talking points. Walk in ready instead of scrambling.
- **Reports and grant narratives.** Recurring documents that follow a predictable structure. Hand over the template, the content, and last year's version for tone, and edit from a 70-percent draft.
- **Survey synthesis.** Hundreds of open-ended responses categorized into themes and sentiment in minutes instead of an afternoon.
- **Professional development design.** Session plans, activities, facilitator notes, and discussion questions built from a learning objective and your audience.

None of these are moonshots. They are the grind a central office already runs on. That is not an accident. When Anthropic looked at 1.2 million real sessions of its Cowork agent over three weeks in May 2026, across more than 600,000 organizations, the single largest category of use, at 33 percent, was ordinary business and operations work: reports, reconciliation, checklists, onboarding documents. Software development was under 9 percent. The most common job for a leading AI agent in the wild is exactly the administrative work nobody wants to own.

06 Responsible Use in a Public School

Running these tools inside a public institution carries obligations the private sector does not have. Trust, student privacy, and the political reality of a district all shape what you should and should not do. The rules are not complicated, and they do not change with the newer agent tools. If anything, agents that touch more files at once make them more important.

What never goes into a prompt. Keep these out of any AI tool, no matter what its privacy settings claim:

- Student names, IDs, or any personally identifiable information. Use aggregate or anonymized data. Indiana's own IDOE guidance for districts puts the emphasis squarely here, on keeping personally identifiable information out of public AI tools (Keep Indiana Learning AI framework).
- Employee-specific personnel details: performance, discipline, health, salary matters.
- Confidential legal matters: investigations, attorney-client communication, pending litigation.
- Board executive session content. What is discussed in closed session stays out.
- Security-sensitive operational details: access codes, emergency plan specifics, threat assessments.

Verify before you use. These tools produce confident, well-written output that is sometimes wrong, especially on specific numbers, legal citations, and dates. Any fact, figure, or citation gets checked before it goes anywhere. Treat the output as a first draft from a capable but occasionally unreliable colleague.

Transparency. You do not need to announce that AI helped draft a routine newsletter. But for significant communications, board presentations, and policy recommendations, be ready to say plainly that AI assisted with drafting and research while the content, decisions, and judgment are yours. Communities accept that. Hiding it and being found out later costs more than the disclosure ever would.

Bias check. Models can reflect the bias in their training data. On anything touching equity, discipline, hiring, or student outcomes, read the output specifically for language or patterns that reinforce a biased assumption.

CALL-OUT: THE STANDARD

Use AI to extend your capacity, not to replace your judgment. Every output that carries your name, your district's name, or reaches a family or a board passes through your review first. The human stays on every decision that reaches a person.

07 Getting Started This Week

Confidence comes from one real task, not a test exercise. Pick something actually on your desk and run the pattern on it. Five concrete moves for the next seven days:

1. **Run the four-step pattern on one recurring document.** Take a job you do every month, the board memo, the finance narrative, the family newsletter. Give the tool the real files, a real assignment, review the draft, and if it worked, save it as a skill so next month starts ahead.

2. **Put a stack of documents into NotebookLM.** Upload a policy set, your strategic plan, or a long report and ask for the three takeaways that matter to a superintendent. Grounded, cited, low risk.
3. **Draft your next hard message.** Describe a situation, no names, and have the tool draft the parent or staff communication. Set the tone, hand it an example of your voice, and edit.
4. **Turn one dataset into a narrative.** Paste an aggregate assessment, enrollment, or budget summary and ask for the trends, anomalies, and the plain-language framing for a board. Compare it to your own read.
5. **Save one thing you will reuse.** The first time you get output you are proud of, save the setup as a template or skill. Front-load the effort once, save it every future time.

The goal is not mastery. It is one real experience that shows you what the work looks like when the tool does the grind and you keep the judgment. Everything else builds from there.

About Willow Run Group

Willow Run Group helps leaders and operators understand and reduce the cognitive and operational weight they carry before adding tools or initiatives. The work is systems-first: map how the job actually gets done, then put AI where it removes real weight. For questions or to go deeper, reach Steve Troyer directly at steve@thewillowrungroup.com or thewillowrungroup.com. The EdLeaderAI workflow library at edleaderai.com packages 60 of these plays, ready to run in your own central office.

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