CASE STUDY

Speaking the School Board's Language:

How Educational ROI Data Guided Smarter Planning in Uncertain Times

LevelData

Background

The School District of Lee County, located in Fort Myers, Florida, serves over 100,000 students across 116 schools, making it the eighth largest district in the state. In 2023, Leta Dietz Smith, the Assistant Director overseeing Title I programs, faced pressure to evaluate how major funding investments, such as ESSER grants, impacted student outcomes.

According to Smith, a former classroom teacher, "We quickly realized we didn't have the internal capacity to calculate impact. I do not have a finance background... I'm a teacher at heart. But I was managing significant amounts of funding and needed a better way to connect spending to student success."

School District of Lee County At-a-Glance

- **101,369** students
- **27th** largest district in the country
- **8th** largest district in Florida
- **157** different languages
- **116** schools

The Challenge

With over $300 million in ESSER funding and no internal program evaluator, the leadership team at The School District of Lee County struggled to determine whether individual instructional resources were yielding measurable student outcomes. Traditional methods of relying on anecdotal feedback and fragmented data weren't delivering an accurate accounting of their educational return on investment (eROI), making it difficult to justify spending to stakeholders, including the school board.

The urgency to determine eROI was heightened by the appointment of a new superintendent whose strategic plan emphasized fiscal responsibility. Additionally, with the impending ESSER funding cliff, The School District of Lee County could no longer afford to invest in programs without clear evidence of effectiveness. They needed concrete data, rather than assumptions and "gut feelings," to guide their decisions, prioritize high-impact tools, and present a strong case to the school board for continued funding.

The Solution

As Smith wrestled with these challenges, she discovered Level Data's Return on Instruction (ROI) solution as a way to more effectively and efficiently assess whether their instructional investments were affecting student achievement. The tool automates the tedious process of calculating eROI by collecting, correlating, and analyzing program usage, costs, and student outcomes.

The first step in implementing ROI was to align perspectives and priorities across the district, facilitating a shared language and standardization of data so impact could be measured consistently. To support this initiative, Smith formed a cross-functional team with representatives from Human Resources, Academic Services, IT, and Procurement. This ensured collaboration across the district and shared accountability for both financial stewardship and academic results. "We created collective efficacy. People from different departments came together, started speaking the same language, and helped guide smarter, faster decisions," Smith explained.

Once the team was established and they began reviewing the reports generated by ROI, they made several key discoveries. Duplicate purchases were identified across departments that could be eliminated, resulting in immediate cost savings. As they evaluated program usage, they uncovered programs that weren't being used by all the students they were intended for and weren't delivering the expected student growth. The team's initial reaction was to discontinue the use of programs that were being underutilized. However, as they looked at the data more closely, something more nuanced was revealed: students who used a program with partial fidelity were performing better than those who did not use it at all.

"Even those who weren't using it with full fidelity were still outperforming their peers. That was eye-opening. It helped us reframe the question—not whether the program worked, but how well we were implementing it," Smith shared.

This insight shifted the district's focus from "Is the program failing?" to "Are we supporting implementation effectively?"

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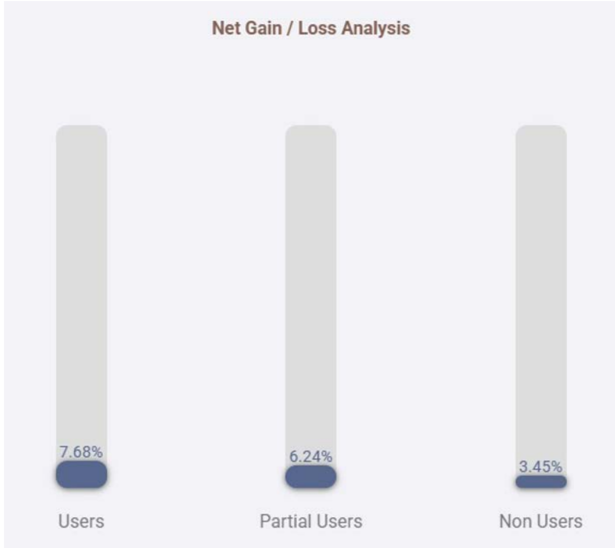

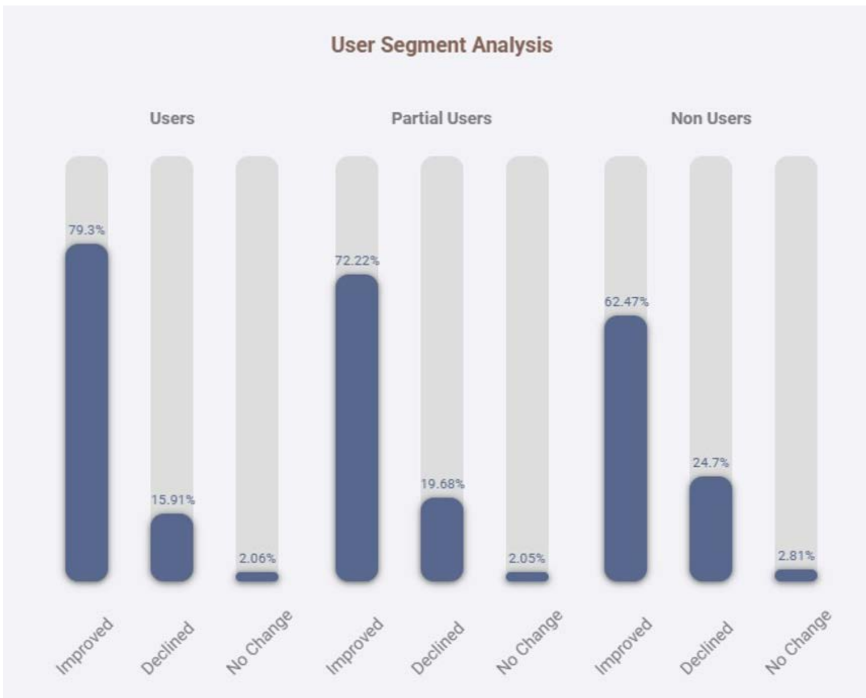

Students using the program to fidelity saw nearly 80% improvement, which resulted in more than double the gains of non-users.

The ROI solution allowed the team to track both digital and nondigital program usage and participation so the impact of their investments in professional learning, coaching, tutoring, and ACT/SAT test prep on student outcomes could also be evaluated.

Results

Implementing the ROI solution changed how The School District of Lee County evaluates instructional investments by creating a collaborative, data-informed culture. The district moved beyond "gut feelings" of what works by measuring program effectiveness through a data-driven framework that correlates academic outcomes with the cost of instruction. Additionally, they uncovered areas of duplicate spending across departments, allowing leaders to reallocate funds toward higher-impact initiatives that directly support student achievement.

The most significant change came in how the data influenced conversations with the school board.

During a mid-year review meeting, the school board questioned whether a costly supplemental instructional tool should be renewed, citing the eROI report from Level Data, which showed only a 36% return on investment. Smith and her team reframed the discussion by emphasizing that although the percentage was accurate, the data indicated an overall underutilization of the tool. They noted that teachers who used the program with even moderate fidelity experienced measurable gains compared to those who did not use it at all. Thus, the program was not failing; rather, the implementation needed to be strengthened.

"This allowed us to go deeper with our board," Smith explained. "It wasn't just, 'This program works or doesn't work.' It was, 'Here's what's happening in the classrooms that are using it well—and here's how we can support everyone else to get there.'"

With this clarity, Lee County communicated both financial responsibility and instructional effectiveness. They now use Level Data's ROI tool to continually assess if programs are enhancing student learning, identify necessary improvements, and connect every dollar to meaningful outcomes, ultimately increasing transparency and trust with the school board and stakeholders.
