PLAYBOOK 1 • DISTRICT DATA VISIBILITY

The District Data Visibility Playbook

A practical path from fragmented information to trusted, decision-ready visibility.

CREATED FOR

Superintendents, technology and data teams, program leaders, and state education agencies

The visibility challenge

K–12 districts collect information across student systems, instructional platforms, special education processes, professional learning programs, financial tools, and local spreadsheets. Yet collecting information is not the same as being able to use it.

When critical data is fragmented, incomplete, or delayed, leaders spend valuable time assembling the story before they can address the problem. This playbook helps district teams identify their most consequential visibility gaps, establish shared practices, and create a practical path from data collection to action.

WHAT YOU'LL LEARN

- Recognize the warning signs of fragmented district information.
- Identify the decisions that require earlier, more reliable visibility.
- Clarify ownership, definitions, and review expectations.
- Build a 90-day visibility improvement plan.
- Connect stronger visibility to reporting, services, investments, and educator support.

How to use this playbook

- Bring together a small cross-functional team.
- Complete the visibility assessment independently, then compare responses.
- Select one priority decision or workflow rather than attempting to solve everything.
- Use the worksheets to define the information, owners, review cadence, and response.
- Revisit the plan after 30, 60, and 90 days.

1 Diagnose the current state

Visibility problems often appear as operational frustrations: repeated requests, conflicting reports, late corrections, and spreadsheets created to bridge gaps between systems. Use the indicators below to identify where the district may be absorbing hidden cost or risk.

Signal	What it may indicate	Questions to ask
Different numbers in different meetings	Definitions, timing, or sources are inconsistent.	Which source is authoritative? When was each report refreshed?
Last-minute reporting corrections	Errors are being found after entry rather than at the source.	Where did the issue begin? Could staff receive earlier guidance?
Leaders rely on emailed spreadsheets	Information is not accessible in a shared workflow.	Who maintains the file? What happens when that person is unavailable?
Schools use different processes	Shared expectations are unclear or difficult to follow.	What must be consistent? Where is local flexibility appropriate?
Questions take days to answer	Relevant information must be combined manually.	Which systems and people are required to assemble the answer?

Quick assessment

1. Which recurring question takes the longest to answer?

2. Which report generates the most manual correction or follow-up?

3. Where do leaders typically learn about a problem too late?

4. Which spreadsheet or locally maintained file would create the greatest risk if its owner left?

2 Start with a decision—not a dashboard

A useful visibility initiative begins with a decision that leaders need to make. Starting with a dashboard often produces more information without clarifying what action the information should support.

> DECISION-FIRST FRAMING
> Replace “What data can we display?” with “What decision are we trying to make, what must we know, and when must we know it?”

The five-part decision brief

- Decision: State the choice, intervention, or follow-up the information should support.
- Audience: Identify who must understand and act on the information.
- Evidence: Define the minimum information required to make the decision confidently.
- Timing: Establish when the information must be available to remain useful.
- Response: Define what happens when an indicator requires attention.

Decision brief

1. What decision are we trying to improve?

2. Who makes the decision and who contributes?

3. What information is essential—and what is merely interesting?

4. How early must the information be available?

5. What action should occur when the indicator is off track?

3 Build the foundation for trusted information

Before information can guide action, teams must trust its accuracy, meaning, and timing. Trust is built through shared definitions, clear ownership, validation close to the point of entry, and transparent review practices.

Four foundations

- Shared definitions: Document how critical fields, statuses, and measures are defined. Avoid allowing the same term to mean different things across departments.
- Named ownership: Assign responsibility for entry, review, correction, escalation, and final approval. Ownership should belong to roles, not only individuals.
- Early validation: Identify issues while information is entered or updated—not only when a report is due.
- Visible timing: Show when information was last refreshed and whether a delay affects its use.

Ownership worksheet

Information element	Authoritative source	Owner	Review cadence
Student enrollment status	__________	__________	__________
Special education service documentation	__________	__________	__________
Program participation	__________	__________	__________
Coaching activity	__________	__________	__________
Other: ________________	__________	__________	__________

4 Design a workflow that leads to action

Visibility improves outcomes only when a team knows how to respond. A strong workflow makes the signal, owner, expected action, and follow-up visible.

Trigger	Owner	First response	Escalation
A required field is missing	__________	Correct at the source	Escalate after ____ days
Service documentation is incomplete	__________	Confirm delivery and documentation	Notify program leader
Program participation is below target	__________	Identify implementation barrier	Review resource allocation
Coaching follow-up is overdue	__________	Reconnect with coach/leader	Review support needs

Design principles

- Make the expected response clear enough that staff do not need to interpret a report differently.
- Keep responsibility close to the work while giving leaders aggregate visibility.
- Distinguish an informational indicator from one that requires action.
- Create an escalation path for unresolved issues.
- Review whether the workflow creates unnecessary burden or duplicate entry.

KEEP THE PURPOSE VISIBLE

Teams are more likely to maintain accurate information when they understand how it affects students, services, funding, and district decisions.

5 Your 90-day visibility plan

Period	Primary objective	Key actions	Evidence of progress
Days 1–30	Define and align	Select the decision; document definitions, source, owners, and baseline.	Shared brief approved; baseline documented.
Days 31–60	Pilot and adjust	Test with a limited group; review errors, burden, timing, and response.	Pilot users can identify and act on priority signals.
Days 61–90	Scale and sustain	Refine workflow; expand access; set recurring review and governance.	Consistent adoption; fewer delays or manual corrections.

90-day planning worksheet

1. What single decision or workflow will we improve?

2. What baseline will we capture before making changes?

3. Which schools, teams, or roles should participate in the pilot?

4. What will we review at 30, 60, and 90 days?

6 Visibility maturity checklist

Review the statements below with your team. Each unchecked item is a candidate for the next improvement cycle.

- [ ] Critical information has an authoritative source.
- [ ] Shared definitions are documented and accessible.
- [ ] Owners are assigned for entry, review, correction, and escalation.
- [ ] Errors are identified close to the point of entry.
- [ ] Leaders can see when information was last updated.
- [ ] Reports identify what requires attention—not only what occurred.
- [ ] Staff understand the action expected when an issue appears.
- [ ] District and school teams use a shared review cadence.
- [ ] Local flexibility does not undermine districtwide consistency.
- [ ] The process reduces, rather than adds, duplicate work.

A PRACTICAL NEXT STEP

Choose the first unchecked statement that affects an important district decision. Turn it into a 90-day improvement priority.

How Level Data helps

Level Data helps K–12 districts and states validate data quality, automate critical workflows, connect information across systems, and surface the insights leaders need to act. Solutions can support student data validation, live reporting, integrations, IEP service tracking, coaching visibility, education ROI, and statewide data management.

START WITH ONE DECISION

Confirm the authoritative source, the accountable owner, the review cadence, and the expected response before adding another report or dashboard.

Continue the conversation

Explore Level Data solutions or request a conversation at leveldata.com.