Level Data

LEVEL DATA PRACTICAL GUIDE

The Practical K-12 AI Playbook

How district teams can use AI to save time, improve clarity, strengthen analysis, and support better work—without giving up human judgment.

CREATED FOR

District and school leaders, educators, data teams, communications teams, student services, and operations staff

Use AI as a capable assistant, not an automatic authority

The most useful way to begin with artificial intelligence is not to ask, “What can this tool do?” Start with the work your team already performs: summarizing information, drafting communications, organizing ideas, preparing meetings, analyzing patterns, adapting materials, and documenting next steps.

AI can make many of those tasks faster, but speed is only useful when the result remains accurate, appropriate, secure, and connected to a real decision. This playbook gives K-12 teams a repeatable method for deciding when to use AI, creating stronger prompts, reviewing outputs, and turning individual experimentation into responsible team practice.

WHAT YOU'LL LEARN

- Recognize tasks that are—and are not—good candidates for AI.
- Write clear prompts using a six-part framework.
- Improve weak outputs through critique and revision.
- Verify accuracy, tone, bias, accessibility, and source support.
- Use practical prompt starters across common district workflows.
- Build a 30-day team adoption plan with measurable value.

CORE EXPECTATION

AI may draft, organize, compare, question, and suggest. A qualified person must still provide context, verify the work, and remain accountable for the final decision.

1 Decide whether AI fits the task

AI works best when the goal is clear, the output can be reviewed, and an error is detectable and correctable. It is a poor substitute for professional judgment, authoritative records, legal interpretation, or a consequential decision about a student or employee.

Good starting tasks	Use additional caution	Do not delegate
Brainstorm options and questions	Summarize sensitive information	Final eligibility or placement decisions
Create a first draft or outline	Analyze student or staff data	Discipline, safety, or legal determinations
Rewrite for tone or reading level	Recommend interventions or resources	Fact verification without source review
Organize notes into themes	Create student-facing materials	Entering protected data in unapproved tools
Build agendas and checklists	Translate high-stakes communications	Communications sent without human approval
Compare non-sensitive options	Interpret policies or requirements	Replacing educator or specialist judgment

The four-question task test

- Purpose: Can we state the problem and intended user clearly?
- Data: Can the task be completed using information approved for this tool?
- Review: Does a qualified person have the time and knowledge to check the result?
- Impact: If the output is wrong, can we detect and correct it before harm occurs?

> IF ANY ANSWER IS NO
> Redesign the task, reduce the data, add a stronger review step, use an approved system—or do not use AI.

2 Build stronger prompts with PURPOSE

A prompt is a work brief. Strong prompts reduce ambiguity by explaining the job, context, inputs, boundaries, and desired output. Use the PURPOSE framework whenever the task matters enough to review or reuse.

Element	What to provide
P — Problem	The need or question the work should address.
U — User	Who will use or receive the output.
R — Role	The perspective or expertise the AI should apply.
P — Provided context	Relevant facts, source material, definitions, and constraints.
O — Output	The format, length, organization, and level of detail.
S — Safeguards	What not to assume; required checks, tone, privacy boundaries, and citations.
E — Evaluation	The criteria you will use to judge whether the answer is useful.

PROMPT TEMPLATE

Help me [task] for [user/audience]. Act as [role]. Use only the following context: [information]. Produce [format and length]. Follow these requirements: [constraints]. Do not invent missing facts; identify questions or assumptions. A strong result should [evaluation criteria].

Create your prompt

1. What problem are you trying to solve?

2. Who is the user or audience?

3. What context and source material are required?

4. What should the output look like?

5. What must the AI avoid, flag, or verify?

3 Use a draft–critique–revise workflow

The first output should rarely be the final output. Treat the interaction as a working session in which the AI drafts, tests, and improves the material while the person directs the work and evaluates quality.

Step	Action	Useful follow-up
1. Draft	Request a specific first version.	"Create a concise first draft using the requirements above."
2. Question	Ask what information is missing.	"What would you need to improve accuracy or usefulness?"
3. Critique	Have the AI identify weaknesses.	"List the three biggest risks, assumptions, or gaps in this draft."
4. Verify	Check claims against authoritative sources.	"Separate supported facts, inferences, and items requiring verification."
5. Revise	Give targeted feedback.	"Revise for a superintendent audience; remove jargon and keep all caveats."
6. Approve	A qualified person edits and owns the result.	Document significant changes when the use is high impact.

Better follow-up instructions

- Shorten this by 30% without removing the decision, evidence, or next step.
- Show me where the language is vague, overly certain, or unsupported.
- Create three alternatives and explain the tradeoff in each.
- Rewrite this for families at an eighth-grade reading level without changing the meaning.
- Turn this into an action list with owner, due date, dependency, and success measure.
- What could a skeptical reader misunderstand or challenge?

4 Review every important output

Fluent language is not evidence of accuracy. Review the output based on the risk of the task, not how polished it sounds. The person approving the result should be able to explain why it is reliable and appropriate.

Check	Review question
Accuracy	Are names, dates, calculations, requirements, and claims correct?
Source support	Can important statements be traced to an authoritative source or record?
Completeness	What relevant context, exception, stakeholder, or alternative is missing?
Tone	Is the language clear, respectful, and appropriate for the audience?
Bias and equity	Could the result work differently or create uneven burden across groups?
Accessibility	Is the format usable, readable, and adaptable for diverse needs?
Privacy	Does the output reveal or infer information that should not be shared?
Actionability	Is the decision, owner, next step, or expected response clear?

> THE FINAL-READER TEST
> Would you be comfortable explaining the output, the source information, the review performed, and the decision to use it to a student, family, colleague, or board member?

5 Protect district and student information

Do not assume an AI tool is approved simply because it is easy to access. Follow district policy and use authorized accounts, tools, and data. Prompts, uploads, generated outputs, chat history, feedback, and logs may all become part of the information lifecycle.

Before entering information

- Confirm the tool and account are approved for the intended use.
- Remove names, identifiers, and details the task does not require.
- Use synthetic, aggregated, or de-identified examples whenever possible.
- Understand whether prompts or files may be retained, reviewed, or used to improve models.
- Confirm who can access the conversation and generated output.
- Store the final work in the district's approved system—not only in the AI tool.
- Report unintended disclosure, harmful output, or unexpected behavior through the district's established process.

Instead of entering…	Use…
A student's name, ID, IEP, health detail, or disciplinary record	A de-identified scenario with only the minimum relevant facts.
A confidential personnel matter	A generic role-based example without identifying circumstances.
An entire spreadsheet	Approved aggregate fields or a synthetic sample that tests the workflow.
A restricted contract or legal document	An approved secure tool—or a general question reviewed by counsel.
Credentials, access tokens, or security details	Never enter them in a prompt.

> WHEN IN DOUBT
> Pause and ask the district's privacy, security, data, or legal owner before entering the information.

6 Practical uses across district teams

Team	Useful applications	Human responsibility
Executive leadership	Meeting briefs, scenario questions, board-message drafts, priority summaries.	Confirm strategy, evidence, implications, and commitments.
Data and technology	Documentation, data dictionaries, test cases, issue summaries, training drafts.	Validate logic, security, definitions, code, and source systems.
Curriculum and instruction	Lesson variations, discussion questions, exemplars, rubrics, family explanations.	Ensure standards alignment, instructional quality, accessibility, and age fit.
Special education and student services	Process checklists, meeting preparation, plain-language drafts, trend questions.	Protect records and preserve individualized professional decisions.
Communications	First drafts, FAQs, summaries, tone changes, channel adaptations.	Verify facts, approvals, community context, and final message.
Operations and finance	Process maps, vendor comparisons, meeting notes, risk questions, option summaries.	Validate cost, policy, contract, and operational assumptions.
Professional learning	Agendas, scenarios, reflection prompts, practice activities, follow-up resources.	Ensure relevance, accuracy, facilitation quality, and evaluation.

A useful boundary

Use AI to support preparation and pattern recognition. Do not let it silently become the decision-maker in workflows involving student rights, access, services, discipline, safety, employment, or resource allocation.

7 Ready-to-adapt prompt starters

Replace bracketed text, provide approved source material, and add the safeguards required for the task. Do not paste protected information into an unapproved tool.

Workflow	Prompt starter
Meeting preparation	Using the approved notes below, create a one-page meeting brief with purpose, decisions needed, open questions, risks, and next steps. Do not add facts not present in the notes.
Action plan	Turn this approved project summary into a 30-day action plan with action, owner role, timing, dependency, and evidence of completion. Flag anything that requires clarification.
Family communication	Draft a clear family message explaining [topic]. Use an eighth-grade reading level, define necessary terms, avoid jargon, and include what families need to do next. Mark any policy claim that requires verification.
Board summary	Summarize the approved information for a board audience in five bullets: current state, evidence, implications, risk, and requested decision. Preserve uncertainty and do not overstate results.
Data-quality review	Using this de-identified field list and validation rules, propose test cases for missing, invalid, inconsistent, duplicate, and out-of-range values. Return a table with test, expected result, and owner.
Policy questions	Review this approved policy excerpt and generate questions district leaders should resolve before implementation. Do not provide legal conclusions; distinguish text-based observations from questions for counsel.
Professional learning	Create a 45-minute staff learning session on [topic] with objectives, scenario, guided practice, reflection, and exit check. Identify prerequisite knowledge and accessibility considerations.
Vendor review	Based only on the vendor materials provided, list supported claims, unsupported claims, missing evidence, privacy questions, implementation dependencies, and questions for references.
Content adaptation	Adapt this approved content for [audience/channel]. Preserve all facts and caveats. Use [tone], [length], and [format]. List any information you removed.

8 Build repeatable team workflows

The goal is not to collect clever prompts. It is to create a small number of approved workflows that consistently produce useful work. Each workflow should have a purpose, approved tool, data boundary, prompt, reviewer, quality criteria, and evidence of value.

Workflow field	Team definition
Task and intended value	_____
Approved users and tool	_____
Permitted and prohibited data	_____
Standard prompt or process	_____
Required reviewer	_____
Quality and safety checks	_____
Baseline and success measure	_____
Review date and owner	_____

What to measure

- Time saved after including review and correction time.
- Quality improvement compared with the previous process.
- Frequency of material errors, unsupported claims, or major rewrites.
- User adoption, confidence, and support needs.
- Privacy, security, accessibility, or equity concerns.
- Whether the workflow improves the underlying decision or service.

9 A 30-day adoption plan

Period	Focus	Actions	Evidence
Week 1	Learn and select	Review expectations; identify three recurring tasks; choose one low-risk workflow.	Named owner, approved tool, task brief, and baseline.
Week 2	Prompt and test	Build the prompt; use synthetic or approved information; test several examples.	Documented prompt, known limitations, and reviewer checklist.
Week 3	Pilot with people	Train a small user group; run real work within the approved boundary; gather feedback.	Usage, time, quality, corrections, and concerns captured.
Week 4	Decide and standardize	Compare with baseline; revise the workflow; approve, limit, pause, or stop.	Decision, final process, owner, measures, and next review date.

Your first team workflow

1. Which recurring, low-risk task will we improve?

2. How is the work completed today, and what is the baseline?

3. What approved information and tool will we use?

4. Who will verify and approve every output?

5. What result after 30 days would justify continued use?

10 How Level Data supports better AI use

Practical AI use depends on reliable context. When source information is incomplete, definitions conflict, or critical data is spread across systems and spreadsheets, even a strong prompt may produce a misleading result. Better AI use begins with clarity about the authoritative source, data quality, ownership, timing, and intended decision.

Level Data helps K-12 districts and states validate data quality, connect information across systems, automate critical workflows, and surface the visibility leaders need to act. That foundation can help teams prepare cleaner inputs, establish trustworthy baselines, verify results, and measure whether an AI-supported workflow is delivering real value.

START HERE

Choose one recurring task. Confirm the authoritative information, permitted use, accountable reviewer, current baseline, and desired outcome before introducing AI.

Selected resources

- National Institute of Standards and Technology. AI Risk Management Framework and Generative AI Profile. nist.gov
- U.S. Department of Education, Student Privacy Policy Office. Protecting Student Privacy resources. studentprivacy.ed.gov
- TeachAI. AI Guidance for Schools Toolkit, updated 2025. teachai.org/toolkit
- Consortium for School Networking and Council of the Great City Schools. K-12 Generative AI Readiness Checklist. cosn.org
- UNESCO. Guidance for Generative AI in Education and Research. unesco.org

- This playbook provides operational guidance, not legal advice. Districts should follow current policy and consult qualified privacy, security, accessibility, procurement, and legal leaders as appropriate.

Continue the conversation

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

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