

Ed-Fi Data Governance Playbook

Updated August 2026 V1



Resolution Task Force (RTF) Meetings

API issues can be difficult to debug:

- The vendor software may have a bug
- The LEA may be entering data or configuration incorrectly into their SIS
- The state API may have an error

To cut through finger-pointing and make progress, RTF meetings are ESSENTIAL to creating an agile state support system.

SEA-led vendor workshops bring together SEA staff, district data stewards, and a single vendor's technical and product teams (8-10 participants) to identify and resolve issues, repeating as needed until major issues are addressed.



Not sure how to run RTF meetings?

The Ed-Fi Alliance staff is happy to help you start these meetings up and even attend a few until your team feels comfortable.

- **Who? SEA convenes vendor specific workshops, consisting of:**
 - SEA program (required) and technical leads (required)
 - 3-5 LEAs, represented by the actual data stewards (required - persons assigned to resolving LEAs Level 1 and Level 2 errors), and any leadership (optional)
 - Vendor technical staff from a single vendor who manage Ed-Fi (required) and product management (recommended)

Meetings should have about 8-10 active participants; more can lurk if desired, but these are working meetings
- **How often? RTF meetings for each vendor should occur at least twice a week**
- **Where? Workshops should be held online (it is inefficient for technical staff to travel)**
- **Before the meeting:**
 - **Working with the LEAs, the convener identifies the top 3 – 5 current top issues to address in each workshop. These are the issues causing LEAs the most trouble currently.**
 - **For each issue, the SEA creates a ticket in their ticketing system, so that everyone has visibility. Details are entered into the ticket.**
 - **The convener sends out an agenda with the links to the tickets.**
- **At the meeting:**
 - **Each issue/ticket is tackled, one-at-a-time.**
 - **Because the technical people from each side of the API are on the call (the SEA, the LEA and the vendor) issues are traced to find out where the problem occurs.**
 - **If tracing the issue bogs down, clarify next actions to determine the root cause, record those actions in the ticket, and move on.**
 - **If the root issue is located, record the action to fix in the ticket and move to next issue.**
 - **The goal should be to get to at least 3 issues during the meeting.**
- **After the meeting:**
 - **Convener sends out notes on actions: who is responsible and by when it will be finished (this info is also in the ticket).**
- **Repeat until all major issues have been resolved**

Data Bootcamp Trainings

Level 1 & Level 2 Errors can be difficult to debug, as there are multiple systems involved:

- Utilize Vendor User Group Sessions
- Review vendor API submission reports
- Review State Reporting/Validation Dashboards
- Identify Data Quality issues and re-submit data

To cut through finger-pointing and make progress, Bootcamp trainings are an ESSENTIAL to creating an agile state support system.

SEA-led vendor workshops bring together SEA staff, district data stewards, and a single vendor's product and technical teams (20-35 participants, supported by 3-4 facilitators) to review priorities, gather feedback, and drive improvements at scale.



Not sure how to run a Bootcamp meetings?

The Ed-Fi Alliance staff is happy to help you start these trainings up and even attend a few until your team feels comfortable.

- **Who? SEA convenes vendor specific workshops, consisting of:**
 - SEA program (required) and technical leads (required)
 - Majority LEAs, represented by the actual data stewards (required - persons assigned to resolving LEA Level 1 and Level 2 errors), and any leadership (optional)
 - Vendor product management from a single vendor who manage Ed-Fi (required) and technical staff (recommended)

Meetings should have about 20-35 active participants; with 3-4 staff members to assist.
- **How often? Bootcamp trainings for each vendor should occur during the Parallel stage until LEAs are trained and able to resolve errors independently.**
- **Where? Workshops should be held in-person, in centralized locations that allow groups of LEAs to travel and participate and learn from each other.**
- **Goal: To train LEAs to address their Level 1 and Level 2 errors and to be able to help train their peers – Peer-to-Peer training.**
- **Before the meeting:**
 - **Distribute Key and Secrets to all outstanding participants.**
 - **Publish the data submission dependency order/flowchart for reference.**
 - **Determine the errors with the largest impact, these will be the highest priority.**
- **At the meeting:**
 - **Complete the Vendor Ed-Fi Set-Up process.**
 - **Configure Key and Secret, Mapping Descriptors, etc.**
 - **Review and understand the data submission dependency order/flowchart.**
 - **Learn how to identify Level 1 & Level 2 issues and where they are resolved.**
 - **Determine if the issue is a:**
 - **Data Quality issue – if so, correct data inside the SIS and resubmit**
 - **SIS Vendor Issue – Vendor opens ticket to be tracked.**
 - **State Requirement Issue – SEA opens ticket to be tracked.**
 - **For SIS or State Issues – Refer to the Resolution Taskforce Meetings to address these types of issues.**
 - **The goal should be to understand how to resolve as many Level 1 & Level 2 issues as possible during the training.**
- **Repeat until Peer-to-Peer training exist.**

We're here to answer your questions



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Thank you