

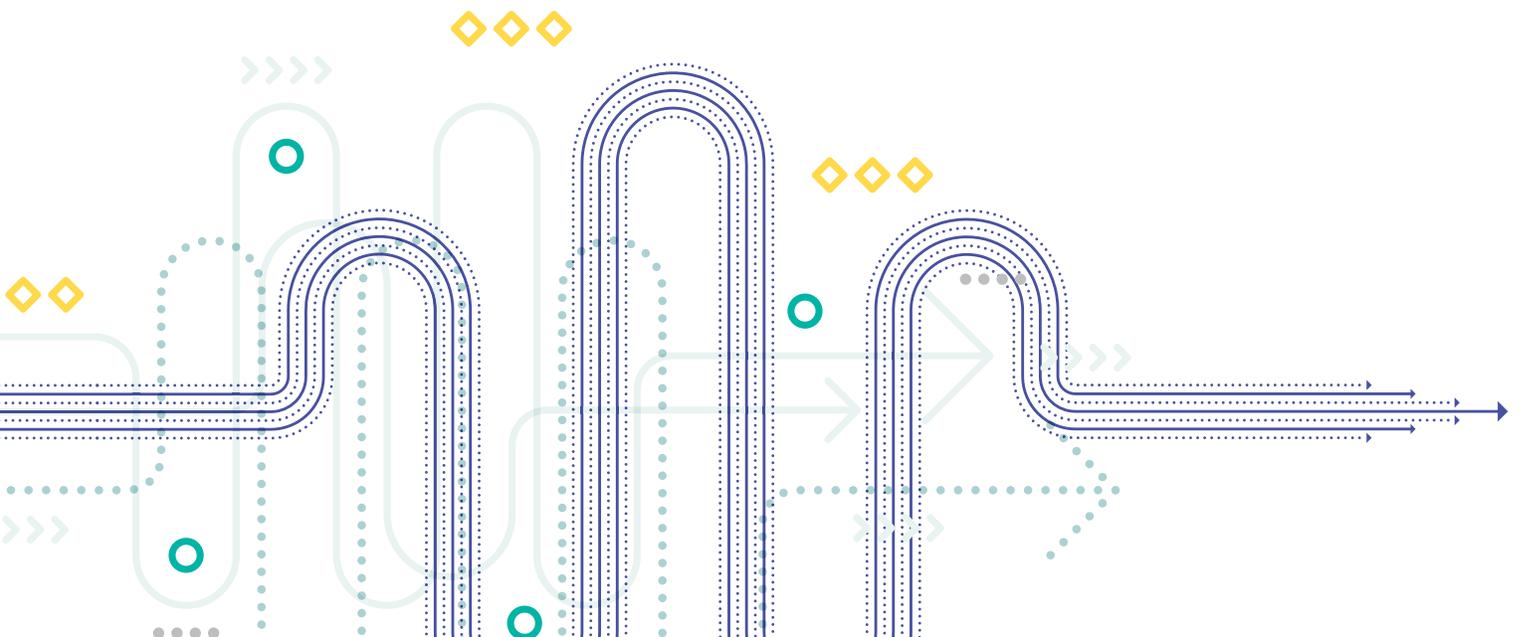
DECISION GUIDE

Developing a Research Request Process for Integrated Data Systems

The value of an integrated data system (IDS) lies in its potential to give researchers an efficient and cost-effective way to understand and aid communities by spotting trends and patterns across multiple data sources. However, to realize this value fully, the system must be set up so that researchers can easily understand how the system operates and how to access its data in a transparent, secure manner.

This guide was created to help state data leaders navigate the practical pathways to secure, transparent, and effective researcher access. When developing a research request process, operators must make several foundational decisions. This guide walks you through eight key decision points to help you design a process that fits your specific context, legal requirements, and organizational goals while promoting transparency and accessibility. A companion document, the [“Decision Guide Worksheet,”](#) provides a spreadsheet to record your actions.

This Decision Guide helps you determine what decisions to make when establishing your research request process. A related resource, [“Creating a Path to Answers: How State Data Leaders Can Empower Researchers,”](#) provides five best practices aimed at improving researcher access to data. The Data Quality Campaign and the Data Integration Support Center at WestEd worked with state data leaders to identify these best practices for enhancing researcher access to de-identified individual-level statewide longitudinal data system data.



What Is a Research Request Process?

A research request process is the formal procedure through which researchers and analysts apply to access nonpublic information from an IDS. The data involved are typically not publicly accessible due to their confidential nature, requiring careful consideration of privacy regulations, data use agreements, and oversight mechanisms. This process ensures that access to protected data aligns with legal, ethical, and governance standards while serving legitimate research purposes. Additionally, carefully considered processes strike a balance between providing requestors with timely information and managing administrative burden and oversight.

KEY DECISION POINTS TO DEVELOP A RESEARCH REQUEST PROCESS

1. Establish Your Goals and Requirements
2. Define Your Scope and Boundaries
3. Determine Eligibility and Access
4. Plan Your Internal Operations
5. Set Timeline Expectations
6. Ensure Regulatory Compliance
7. Develop Your Legal Framework
8. Implement and Communicate Decisions

Roles and Responsibilities for Decision-Making

Different types of decisions require different expertise and authority levels. Understanding who should lead each decision helps ensure appropriate input while maintaining efficient decision-making processes.

- **Strategic and Operational Decisions (Decisions 1–5):** Should be made by operator leadership and program staff with guidance from appropriate governance structures as applicable. These decisions involve mission alignment, resource allocation, operational capacity, and stakeholder relationships that require deep understanding of organizational goals and capabilities.
- **Legal and Compliance Decisions (Decisions 6–7):** Should be led by legal counsel and supported by operator leadership. These decisions involve interpreting regulations, assessing risk, and developing legal frameworks—all of which require specialized legal expertise—while remaining aligned with organizational objectives.
- **Implementation and Communication Decisions (Decision 8):** Should involve collaborative input from leadership, program staff, technical teams, and legal counsel as appropriate, with clear designation of who has final authority for different aspects of implementation.

For each decision, DISC’s companion “[Decision Guide Worksheet](#)” walks operators through key questions and provides a place to record answers.

1. Establish Your Goals and Requirements

Your goals and requirements determine how much flexibility you have in process design, which resources you can justify, and how you will handle competing demands. Understanding your “why” helps you communicate the value of the process to your stakeholders and secure ongoing support.

DECISION: What drives your need for a research request process?

A. Legal Requirements

Legal requirements create nonnegotiable baseline expectations but may leave significant discretion in implementation details. Understanding your legal landscape early prevents costly redesigns later. Consider that legal requirements may conflict with organizational preferences—for example, you may be legally required to provide access but prefer to limit it for capacity reasons.

- Is your IDS statutorily required to provide researcher access?
- What specific laws, such as the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA), or state privacy laws, apply to your data?
- Do you have the legal authority to share data for research purposes?

B. Contractual Obligations

Contractual obligations may be more specific than legal requirements and could include timelines, specific user types, or reporting requirements. Review all agreements with data contributors because they may have different terms for researcher access. Contract modifications may be possible if current terms create operational challenges.

- Do agreements with data contributors require you to enable researcher access?
- Are you bound by legal agreements that include researcher access?
- Do funding agreements specify researcher access requirements for data providers?
- Do funding agreements specify researcher access requirements for external researchers?

DECISIONS IN ACTION

Washington’s Education Research & Data Center (ERDC) restricts researcher access to comply with FERPA, which creates mandatory access provisions while allowing flexibility in how organizations design their specific review processes, timelines, and approval criteria. They must provide access but can determine the “how” of that access. Similarly, the Maryland Longitudinal Data System (MLDS) Center operates under state laws that direct it to conduct research but allow flexibility in designing the external researcher application process, review procedures, and approval criteria.

DECISIONS IN ACTION

Some IDS operators find that their data contributor agreements specify not just that researcher access must be provided but also specific timelines (e.g., “within 90 days of request”) or user categories (e.g., “academic researchers only”). These contractual details then drive specific design choices in the request processes. The New Jersey Statewide Data System (NJSDS) operates under a memorandum of understanding (MOU) among four state agencies, which establishes the framework for data sharing while allowing its Executive Leadership Council flexibility in developing specific access policies and review procedures.

C. Organizational Mission

Mission alignment helps you maintain focus and justify resource allocation. Consider both the direct benefits (research outputs, partnerships) and indirect benefits (data validation, stakeholder engagement, reputation). Clear mission alignment also helps you explain to stakeholders why you are investing in researcher access rather than other priorities.

- Does researcher access align with your IDS’s purpose and mission? If so, how?
- What organizational benefits do you seek (reputation, data validation, partnerships)?

DECISIONS IN ACTION

When researchers submit requests, Washington’s ERDC evaluates how well the proposed research aligns with its educational improvement mission, helping the organization maintain focus on its mission while making consistent approval decisions. The MLDS Center takes a similar approach by requiring applicants to identify which MLDS research agenda question(s) their research addresses and explain how their research will benefit the state, ensuring alignment with the Center’s statutory mission.

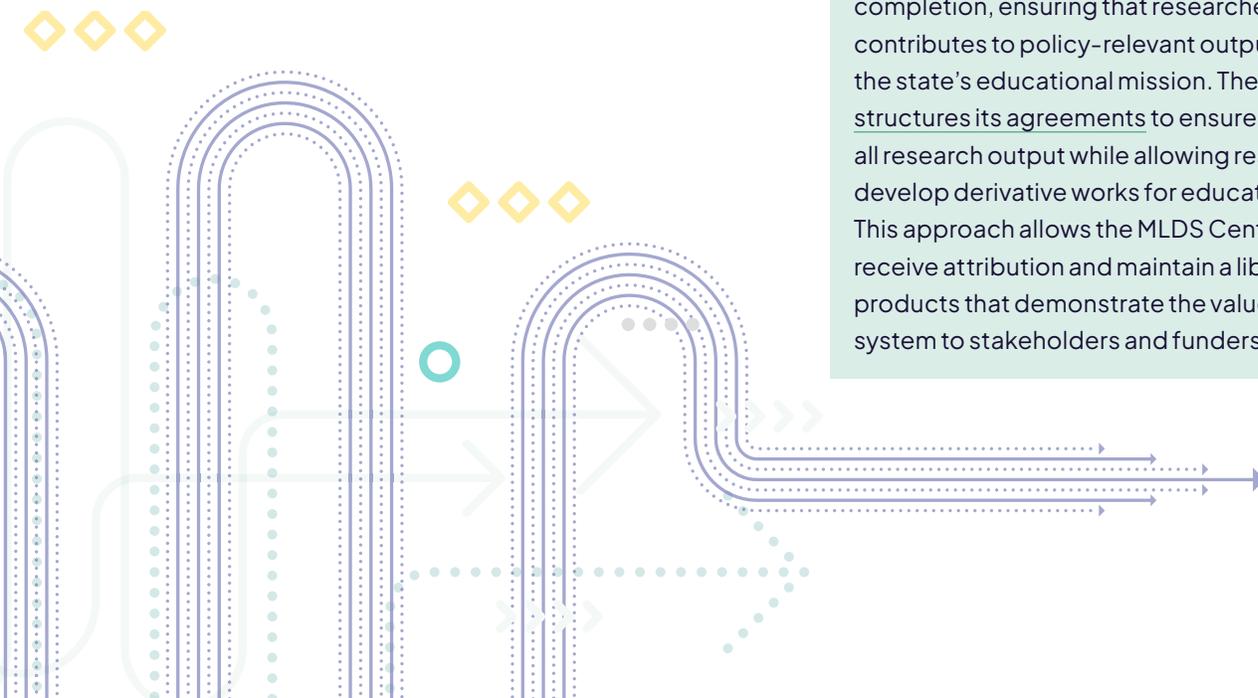
D. Value Creation

Beyond meeting legal or contractual obligations, researcher access can provide significant strategic value to your organization. Understanding what benefits you seek helps you design requirements and processes that maximize return on investment. Consider both tangible outputs (reports, publications, policy briefs) and intangible benefits (reputation, data validation, partnerships). Also consider how supporting open science principles—such as data sharing, reproducible research, and open publication—can amplify the impact of research using your data while maintaining appropriate privacy protections. Clear value expectations also help you measure success and justify ongoing investment in researcher access infrastructure.

- What recognition and attribution do you seek for your organization’s data and mission?
- What types of research outputs (policy briefs, reports, publications, open datasets, reproducible code) would advance your mission?
- Which research institutions or sectors would provide valuable partnerships for your organization?

DECISIONS IN ACTION

Several states structure research agreements to ensure mutual benefit. The Texas Education Research Center (ERC) requires all approved researchers to produce policy briefs within 60 days of project completion, ensuring that researcher access directly contributes to policy-relevant outputs that advance the state’s educational mission. The MLDS Center structures its agreements to ensure that it owns all research output while allowing researchers to develop derivative works for educational purposes. This approach allows the MLDS Center to both receive attribution and maintain a library of research products that demonstrate the value of the data system to stakeholders and funders.



2. Define Your Scope and Boundaries

Clear scope prevents inconsistent decisions, frustrated requestors, and potential legal challenges. Well-defined boundaries help you manage expectations, allocate resources effectively, and maintain defensible decision-making.

DECISION: What will you include in your research request process?

A. Data Assets

Broader data access increases appeal but also increases review complexity and potential privacy risks. Some data may have special restrictions due to sensitivity or contributor agreements. Leverage tools such as a data dictionary, data inventory, or metadata to determine what data assets to include or exclude. The decision to exclude certain data should be defensible and consistently applied.

Data users may also be interested in combining data from sources outside the IDS with data in the system for their analyses. The inclusion of external data sources may or may not be feasible depending on the technical infrastructure of your IDS, established policies, and security and privacy considerations.

- Which data will be available as part of the process?
- Should some data never be included due to sensitivity or contributor agreements?
- Will you allow data from external sources to be combined with data in the IDS?

DECISIONS IN ACTION

Minnesota's Statewide Longitudinal Education Data System publishes comprehensive data inventories for each system, allowing researchers to easily understand exactly what data are available.

B. Research Agenda Alignment

A well-defined research agenda, ideally developed with input from researchers and cross-agency partners, helps you evaluate requests consistently while ensuring that research addresses real policy needs. Many IDSs restrict research requests to purposes aligned with their research or learning agenda. Clear alignment criteria help you make consistent decisions and manage requestor expectations. Overly narrow criteria may exclude valuable research, while overly broad criteria provide little filtering value. Document specific examples of aligned and nonaligned research to guide future decisions.

- How will you determine if research aligns with the purpose of your IDS?
- How narrow or broad will your alignment be?
- Who will make the determinations on alignment?

DECISIONS IN ACTION

Washington's ERDC uses five specific critical questions covering education systems, student outcomes, workforce development, social conditions, and data availability to determine alignment with its research agenda. When researchers submit requests, the ERDC evaluates how well the proposed research addresses these questions, helping the organization maintain focus on its educational improvement mission while making consistent approval decisions.

C. Out-of-Scope Requests

A clear out-of-scope strategy maintains goodwill while protecting the privacy, confidentiality, and security of the system. Consider creating standard referral language and resource lists to make these conversations more efficient and helpful. Having clear decision-making authority also prevents inconsistent responses.

- How will you handle requests that do not fit your scope?
- If requests are out of scope, will you refer the requestor to other data sources, direct them to Freedom of Information Act processes, or offer aggregate data alternatives such as dashboards or flat files?
- Who will make these determinations?

DECISIONS IN ACTION

Washington's ERDC provides [alternative data sources](#) (state report cards, public dashboards, national databases) to help requestors find what they need elsewhere. The [ERDC](#) and the [MLDS Center](#) also do not fulfill single-sector requests, instead directing requestors to the original data contributors.

3. Determine Eligibility and Access

Eligibility criteria both significantly influence your workload and ensure fair access to your data. The decisions you make shape the diversity of research perspectives and outcomes, which can affect policy and public understanding. Overly restrictive requirements may unintentionally exclude valuable contributors, such as community-based organizations or early-career researchers. Therefore, eligibility requirements should be clearly justified and thoughtfully balanced—ensuring broad access while considering resource limitations and the need for data protection.

DECISION: Who can request data, and how will you prioritize requests?

A. Requestor Requirements

Determine whether there will be any restrictions on who can request data from the IDS. Some systems require institutional affiliation, while others may permit access to independent researchers who meet specific security and ethical standards. Decide whether graduate students conducting dissertation research will be eligible.

- Will you limit access to certain types of organizations, such as academic institutions, government agencies, nonprofits, or private sector entities?

- What requirements, such as relevant training, certifications, institutional affiliation, or demonstrated research experience, will you set for individual requestors?
- How will you assess and verify the qualifications and capacity of requestors?

DECISIONS IN ACTION

Washington's ERDC accepts requests from various organization types but has [different processes for different requestor categories](#), including special provisions for legislative staff.

B. Prioritization Framework

A clear and fair prioritization framework helps you manage limited resources effectively while maintaining transparency and trust. When demand exceeds capacity, determining how requests will be evaluated and in what order they will be processed is important. Some IDS operators process requests on a first-come, first-served basis, while others prioritize based on strategic goals or expected impact. Whichever approach you choose, document your prioritization criteria publicly to manage expectations and demonstrate fairness.

- Will all eligible requests be treated equally, or will you apply prioritization?
- What specific criteria will guide your decisions?
- How will you communicate your prioritization process to potential requestors?

DECISIONS IN ACTION

Different IDS operators have developed various approaches to managing demand and prioritization. Washington's ERDC explicitly prioritizes requests from legislators and state agencies, aligning with its public service mission and legal obligations, and communicates this approach clearly on its website so academic researchers understand potential delays during legislative sessions. The MLDS Center uses a tiered review system with "expedited review" for certain researcher types and funding sources versus "full review" for others, providing transparent pathways with published criteria.

4. Plan Your Internal Operations

A thoughtful researcher access policy is built on your organization's structure and processes. Key internal components include staffing and roles, review procedures, application collection and management, and data preparation and delivery.

DECISION: How will you manage the process internally?

A. Staffing and Roles

Staffing decisions determine your capacity and review quality. External reviewers bring expertise and credibility but add coordination complexity and timeline delays. Internal staff provide consistency and control but may lack specialized knowledge. Factor in that review quality directly affects your legal compliance and reputation— inadequate review can lead to privacy violations, while overly stringent review may discourage valuable research.

- Who will manage applications and communication?
- Will you use external reviewers or committees?
- Who will conduct technical and privacy reviews?
- Who has final approval authority?
- What expertise do you need (legal, statistical, subject matter, data disclosure)?
- What is your privacy and security policy?
- Who will determine if a fee needs to be charged?

DECISIONS IN ACTION

The Texas ERC uses an Advisory Board with representatives from data-contributing agencies plus external experts, requiring coordination across multiple entities but bringing deep subject matter expertise. Washington's ERDC handles more review internally but coordinates with the Washington State Institutional Review Board for individual-level data, allowing for faster processing while maintaining necessary oversight. The MLDS Center combines both approaches. It uses internal staff review, partner agency review, and a Research and Policy Advisory Board for most projects but also engages its Governing Board for certain types of projects, ensuring appropriate oversight while managing review complexity.

B. Review Procedures

Your review process should align with any applicable statutory, regulatory, or contractual obligations. The structure you choose—whether a comprehensive upfront review or an iterative feedback model—will influence both the timeline and the likelihood of successful applications.

A thorough initial screening can prevent an unnecessary burden on governing boards or committees but requires skilled staff and clear criteria. Multiple review stages can enhance quality control but may extend processing times. Regardless of the approach, carefully documenting all decisions is essential because you may need to justify approvals or denials to oversight bodies or legal counsel or during appeals.

- What review steps will you require for each request?
- How will you perform the initial screening?
- Will a rubric be used for the initial screening?
- Will the request need a committee review?
- How will you determine if the data are available?
- What happens if the requestor is not requesting the correct type(s) of data?
- Will you allow researchers to appeal rejected applications?

DECISIONS IN ACTION

The Texas ERC has a [structured process](#) with initial ERC staff screening and then Advisory Board review, during which researchers present their proposals. Washington's ERDC [reviews](#) for FERPA compliance and data contributor authorization. Both systems document decisions thoroughly and provide clear feedback to unsuccessful applicants. The MLDS Center has developed a [comprehensive multistage process](#): initial staff review; partner agency review; Research and Policy Advisory Board review; and for certain projects, final Governing Board approval. It clearly documents the criteria for each review stage and the timeline expectations for applicants. The NJSDS implements a multicriteria scoring system evaluating literature review/context, research design, and feasibility with prescreening for priority research area alignment and multiagency data use.

C. Application Collection and Management

A smooth application collection process sets the tone for researcher interactions and affects your operational efficiency. The method you choose for collecting and managing applications affects both user experience and internal workflow. Consider security requirements for handling potentially sensitive proposal information, staff capacity for managing different submission formats, and the need for tracking and version control. Your collection process should align with your technical capabilities while providing researchers with clear, accessible submission pathways.

- How will researchers submit their applications and supporting materials?
- What technology platform will you use to collect and track applications?
- How will you ensure secure handling of sensitive application information?
- What file formats and sizes will you accept?
- How will you manage version control for application revisions?
- What confirmation and tracking processes will you provide to applicants?

DECISIONS IN ACTION

Different IDS operators use various approaches for collecting application materials. The NJSDS uses [online forms](#) through Zoho with file upload capabilities for proposals, curricula vitae (CVs), and supporting documents, setting clear specifications (three single-spaced pages in 11-point Times New Roman). The MLDS Center requires completion of an [online application](#) with upload of completed forms and CVs for all team members. Some systems use dedicated research management platforms, while others rely on email submissions with specific naming conventions and security requirements. The choice of collection method affects both user experience and internal workflow efficiency.

D. Data Preparation and Delivery

Data preparation and delivery methods significantly affect your security posture and operational workload. More secure delivery methods, such as modern “bring analysis to the data” approaches using secure enclaves, require greater technical infrastructure but provide better protection. Supporting researchers during projects builds relationships but consumes staff time. Regular compliance monitoring prevents violations but requires dedicated resources. Consider how technology can enhance your capacity—automated submission forms, initial screening tools, and workflow management systems can help small teams handle growing demand efficiently.

- How will you prepare the data for release (cleaning, de-identification)?
- Who will be the data disclosure specialist?

- What delivery methods will you use (secure portals, encrypted files, data enclaves)?
- What ongoing support will you provide during research projects?
- How will you monitor compliance with data use agreements?

DECISIONS IN ACTION

Texas offers two options for data access—remote and in person. The remote access option uses a sophisticated approach with secure virtual machines, controlled workstation access, and rigorous masking requirements along with mandatory review of all research outputs before release. Washington’s ERDC offers both secure file transfer and an Education Data Enclave that keeps data secure while providing analysis tools.

5. Set Timeline Expectations

Realistic timeline management is critical for maintaining researcher trust and operational sustainability. Clear, achievable timelines help researchers plan their work, secure funding, and meet their own deadlines, while protecting your staff from unrealistic demands and burnout. Publishing transparent timelines reduces status inquiries, demonstrates accountability, and helps manage researcher expectations from the start. However, setting these expectations requires careful balance—overly optimistic timelines erode trust if delays occur, while excessive padding may discourage researchers from pursuing valuable projects. Your timeline decisions must account for internal capacity, external dependencies (such as Institutional Review Board [IRB] reviews or data contributor approvals), and seasonal variations in demand.

DECISION: How quickly can and should you process requests?

A. Processing Timeline

Publishing clear timelines serves multiple purposes: It helps researchers plan their work, reduces status inquiries to staff, and demonstrates transparency. External dependencies (IRB reviews, data contributor approvals) often cause delays beyond your control, so build buffer time into estimates rather than promise unrealistic timelines. Include visual process maps showing each stage, realistic time estimates, and factors

that might affect processing time. Consider maintaining a public request log showing the current status of applications, which helps researchers track progress and avoid duplicating existing projects.

- How long will each review stage take?
- What factors might extend timelines (complexity, external reviews, legal consultation)?
- How will you communicate timelines to requestors?

- What service level commitments are you comfortable making?
- How many requests can you realistically handle in a defined period?
- Will you accept requests on a rolling basis or in cycles?
- How will you manage peak demand periods?
- What happens if you receive more requests than you can process?

DECISIONS IN ACTION

The Texas ERC schedules quarterly Advisory Board meetings and requires proposals to be submitted 35 days prior, creating a structured but potentially lengthy process. The MLDS Center has developed specific timelines for different review tracks: Expedited review processes require applications to be submitted 14 days before Research and Policy Advisory Board meetings, while full review processes require 21 days before Governing Board meetings. The MLDS Center publishes these timelines clearly and adjusts them based on application volume.

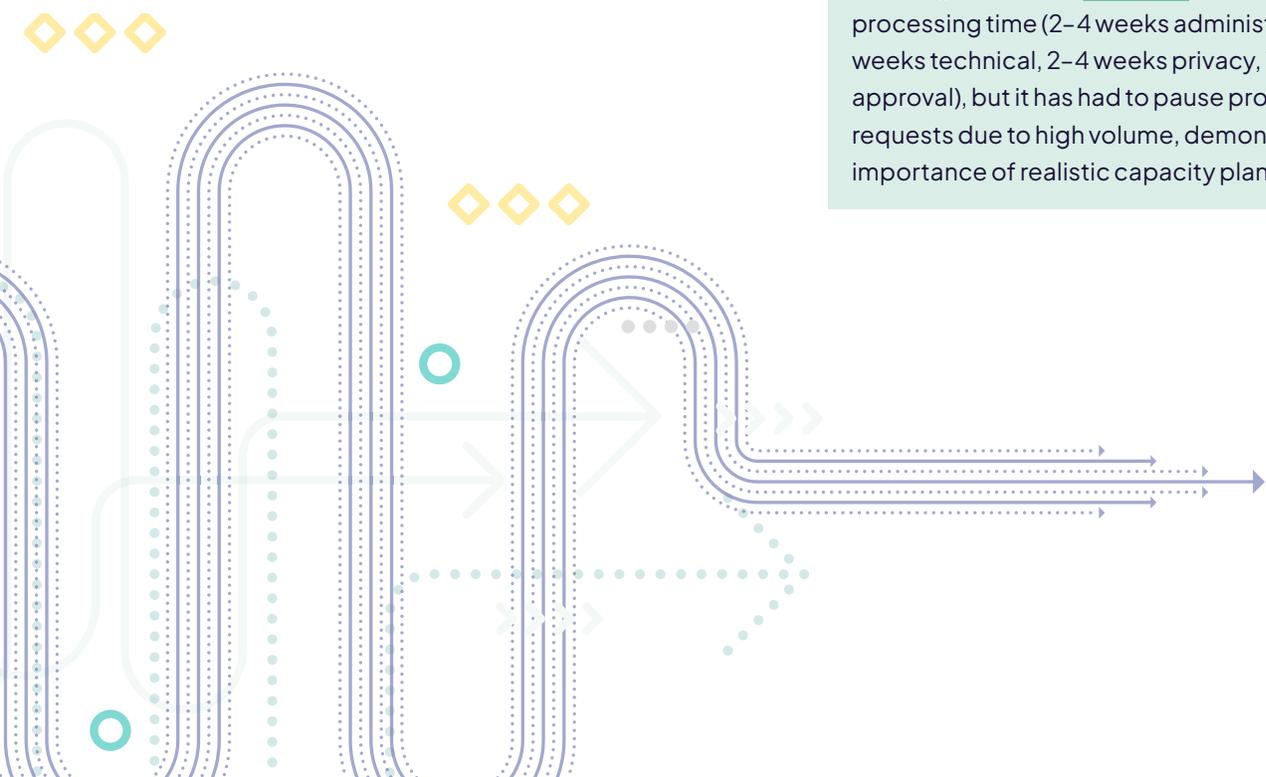
B. Capacity Management

Capacity management is critical for sustainable operations and requestor satisfaction because demand for longitudinal data typically grows exponentially once researchers discover the system’s capabilities. Early adopters share their positive experiences, leading to increased requests from others. This organic growth, while validating the system’s value, can quickly overwhelm unprepared organizations. The consequences of inadequate capacity planning extend beyond simple delays—they can damage stakeholder relationships, undermine the system’s reputation, and create political pressure that threatens long-term sustainability. Effective capacity management requires answering fundamental questions about service levels, resource allocation, and demand management.

- How many requests can you realistically handle in a defined period?
- Will you accept requests on a rolling basis or in cycles?
- How will you manage peak demand periods?
- What happens if you receive more requests than you can process?

DECISIONS IN ACTION

Washington’s ERDC indicates 9–16 weeks total processing time (2–4 weeks administrative, 4–6 weeks technical, 2–4 weeks privacy, 1–2 weeks final approval), but it has had to pause processing new requests due to high volume, demonstrating the importance of realistic capacity planning.



6. Ensure Regulatory Compliance

Privacy and security are not just compliance checkboxes—they are foundational elements that enable sustainable researcher access. Building privacy protection into every stage of the research process creates a culture of responsible data use that maintains public trust while enabling valuable research. Ensuring that your research decisions comply with both state and federal regulations is essential, and consulting legal counsel can help you navigate these complex requirements. Additionally, IRB oversight may be necessary to uphold ethical standards and protect participants, depending on specific laws and regulations.

DECISION: How will you meet all regulatory compliance requirements while maintaining transparency?

A. Federal and State Regulations

Now that you have made several decisions, ensure that the decisions align with state and federal regulations. Your research request process must accommodate multiple regulatory frameworks that may apply to different types of data and research activities. If you have not already done so, this is a critical point to engage with legal counsel who can help you navigate the complex interplay of regulations and ensure that your processes are legally sound.

- Do your proposed processes comply with FERPA, HIPAA, or other federal and state privacy laws?
- How will you handle situations in which multiple regulations apply to the same dataset?
- How will you adjust the process if regulations change?
- What are your mechanisms to stay current with regulatory updates and communicate changes to researchers?

B. Protection of Human Subjects in Research

IRB oversight ensures that research involving human subjects meets ethical standards and protects participants' rights and welfare, as required by federal regulations or state laws. Depending on the laws and regulations in your state, IRB approval may or may not be required.

- Does the IDS have to comply with regulations regarding human subject research and IRB oversight?
- Who is responsible for determining if the research involves human subjects? Is the responsible party the IDS, the researcher's appropriate institutional official, or the state IRB?
- If the researcher is not affiliated with an IRB, what is the process for human subjects' determinations?

DECISIONS IN ACTION

Most IDS operators require IRB approval as a prerequisite for data access, but they handle this requirement differently. The MLDS Center requires final IRB approval provided by the requestor's institution to be submitted before access is granted and ensures that all individuals accessing data are named on the approved IRB request. The NJSDS requires researchers to obtain IRB approval and acknowledges partnerships with Collaborative Institutional Training Initiative Program institutions for streamlined review processes. The Texas ERC requires researchers to specify which FERPA exception their research meets and ensures IRB compliance as part of its comprehensive approval process. Some systems accept home institution IRB approvals, while others require additional review by their own IRB or ethics committee.

C. Culture of Privacy and Security

Legal compliance alone cannot safeguard sensitive data—true protection requires embedding privacy awareness and security measures into every interaction with your system. A strong culture of privacy with security creates shared responsibility, with every participant understanding their role in protecting the individuals whose data enables valuable research. Building this culture requires deliberate investments in training, leadership, monitoring, and continuous improvement.

- What training will you require for researchers before they access data?

- Who will serve as your privacy officer or primary privacy contact?
- How will you monitor and audit ongoing compliance with privacy requirements?

DECISIONS IN ACTION

Hawaii's Data eXchange Partnership requires all requestors to complete a [data user training course](#) that covers responsible data handling, with certification required before submitting applications. This proactive approach ensures that researchers understand privacy expectations before accessing any data.

7. Develop Your Legal Framework

Effective data use agreements protect against data misuse while balancing researcher access and organizational liability, ensuring clear expectations and enforceable protections for all parties. In addition to data use agreements, organizations should implement supplementary legal agreements to comprehensively regulate researcher conduct and system access.

DECISION: What legal protections and agreements do you need?

A. Data Use Agreements and Licenses

Data use agreements are your primary protection against misuse of data, but overly restrictive agreements can prevent valuable research from happening. The wrong balance can expose your organization to liability or create unenforceable terms that provide no real protection. Well-crafted agreements clarify expectations, provide enforcement mechanisms, and give all parties confidence to proceed. They also demonstrate to oversight bodies that you are taking data protection seriously.

- Will you use standard templates or customize each agreement?
- What key provisions must be included (permitted uses, security requirements, publication terms)?
- How will you identify and address agreement violations?
- What amendment procedures will you allow?

DECISIONS IN ACTION

The Texas ERC has [detailed agreements](#) covering remote access security requirements, data destruction timelines, publication requirements, and penalty provisions including potential prosecution under federal law. Its agreements require policy briefs within 60 days of project completion and specify that researchers who do not comply will be barred from future access. Washington's ERDC [creates agreements after approval](#) and coordinates with data contributors for authorization. Agreements must be enforceable—including clear violation consequences and monitoring procedures. The Texas ERC [requires researchers to agree to audits and electronic monitoring](#). Balance protection with workability—overly restrictive agreements may discourage legitimate research while overly permissive ones provide inadequate protection.

B. Supporting Agreements

Beyond data use agreements, you will need additional legal protections that govern researcher behavior and system access. These agreements work together to create comprehensive legal coverage for different aspects of the research relationship.

- What confidentiality and nondisclosure requirements will you establish?
- Do you need separate acceptable use policies for system access and data handling?
- Will you require security behavior agreements that specify technical requirements?

DECISIONS IN ACTION

Most IDS operators use layered legal agreements to address different aspects of data access. The MLDS Center requires researchers to sign nondisclosure agreements relating to confidentiality of student and workforce data, acknowledge data sharing MOUs with partner agencies, and agree to rules of security behavior for authorized staff. The NJSDS requires researchers to sign nondisclosure research agreements and comply with its data access and use policy and acceptable use policy. This multiagreement approach allows operators to address specific legal requirements (confidentiality, security, data use) while maintaining clarity about different obligations.

8. Implement and Communicate Decisions

Once you have made the foundational decisions outlined in this guide, transparent communication of your policies and procedures is essential for building trust, managing expectations, and ensuring equitable access. Clear communication helps researchers understand whether their projects align with your system and what they can expect from the application process.

DECISION: How will you communicate your research request process to users?

A. Essential Information to Publish

Successful researcher access programs recognize that providing clear, accessible information saves time for both researchers and staff. Making your policies and procedures publicly available is fundamental to building trust and enabling researchers to make informed decisions about whether to apply. Published information serves multiple purposes: It sets clear expectations, reduces staff time spent answering routine questions, demonstrates accountability to stakeholders, and ensures equitable access by providing all potential applicants with the same information. Your published materials should include the following:

Data Documentation

- comprehensive data inventory and dictionary with descriptions, years available, quality notes, and any restrictions

Process Transparency

- visual and written guides for each step from inquiry through data delivery
- realistic timelines for each phase with factors that may affect processing
- public log of active and completed research projects with status updates
- scoring rubrics or evaluation criteria used for review
- examples of in-scope versus out-of-scope requests

Outputs and Impact

- research library with publications, policy briefs, and presentations from past projects
- regular reporting on request volumes, processing times, and program improvements
- clear attribution requirements and citation guidelines

Practical Resources

- self-service training materials on data structure, appropriate uses, and technical requirements
- templates for all required documents with completion instructions
- transparent fee structures with guidance on including costs in grant proposals

Key Questions

Questions to ask as you consider decision points:

- What are the eligibility criteria and requirements for requestors?
- Should there be research alignment priorities? Scope limitations?
- What is the procedure for publications?
- What are the stages for the review process, and what are the decision criteria for each stage?
- What is the fee structure, and what are the fee waiver policies?
- What data are available, and how are they accessed?
- What type of security requirements do you have, and how can requestors access data?
- What are the security requirements and compliance expectations?
- Do you have sample agreements and templates?

B. Communication Channels and Methods

How you communicate your policies is as important as what you communicate. The channels and methods you choose affect accessibility, user experience, and your ability to keep information current. Consider your target audiences (researchers, institutions, policymakers), their preferred communication methods, and your organizational capacity for maintaining different platforms. Effective communication channels reduce barriers to access while ensuring that information remains accurate and up to date.

- What platforms will you use to share information (website, portals, guides)?
- How will you ensure that information remains current and accessible?
- What level of detail will you provide for different audiences?
- How will you handle updates and changes to your process?

C. Ongoing Transparency and Feedback

Transparency is an ongoing commitment that evolves with your process and builds trust over time. Establishing mechanisms for continuous communication, feedback collection, and process improvement demonstrates accountability and responsiveness to user needs. Consider how you will measure and report on your own performance, gather input from stakeholders, and communicate changes that affect current and future applicants.

- How will you track and report on your process performance?
- What mechanisms will you provide for user feedback and process improvement?
- How will you communicate changes or updates to your procedures?
- What information will you share about approved projects and outcomes?

DECISIONS IN ACTION

Successful IDS operators prioritize transparent communication about their processes. Washington's ERDC [clearly communicates its priority system](#) and [critical questions](#) on its website so researchers understand expectations upfront. The MLDS Center [publishes](#) comprehensive policies, fee schedules, and sample agreements, making the entire process transparent to potential applicants. The NJSDS provides [detailed information](#) about its phased approach, eligibility requirements, and evaluation criteria, helping researchers understand both current opportunities and future plans. This transparency builds trust, reduces confusion, and ultimately leads to higher quality applications that align with system goals.

Resources

Featured States

- [Maryland Longitudinal Data System](#)
- [Minnesota Statewide Longitudinal Education Data System](#)
- [New Jersey Statewide Data System](#)
- [Texas Education Research Center](#)
- [Washington's Education Research & Data Center](#)

Other Resources

- [Data Quality Campaign](#), "Creating a Path to Answers: How State Data Leaders Can Empower Researchers"