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THE CAPACITY COLLECTIVE

Look at Your Data in a New Way: Conduct a Data Review

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Purpose: A Data Review is intended to help you take a step back and think through the data you are collecting. Are there any adjustments you may want to make to ensure you have the most *useful* and *meaningful* data possible? Below are some steps to help guide you through the data review process, including creating a data map and creating data stories. Also see our ***Centering Community in Your Data Practices*** and ***Incorporating Culturally Responsive Data Practices*** emPower Tools.

WHAT is a Data Review?

A methodical examination of the data you are already collecting, and what data you want and need to collect to be able to achieve your data goals as a program.

WHY Should We Do a Data Review?

Too often, funders and/or models have the biggest say in the data we collect. A Data Review gives you the chance to center program and community instead.

WHEN Should We Do a Data Review?

If you've never done one before, now! After that, consider reviewing your data anytime there is a major change in funder, or every three years.

Data is a Toolbox – Use it For Good!

The data you collect matters! Ideally what you collect, and how you analyze it, should enable you to:

- **Demonstrate** the impacts of your work, and gaps in services you're well-positioned to fill with your programming
- **Celebrate** successes, keeping everyone motivated, including staff, partner organizations and clients themselves
- **Elevate** stories that have historically been marginalized, and the voice of community as partner in data decisions
- **Advocate** for community with evidence of needs, gaps, barriers and successes that speak to decision makers
- **Innovate** in your programs to respond to evolving community needs as they are happening

Data Review Step 1: Create a Data Map

Step 1: Review Your Forms

Gather all of your data collection tools including intake forms, enrollment forms, screenings and assessments, contact forms, surveys and anything else you use regularly to collect any type of data from clients.

Go through each tool, field by field, and look critically:

- **Why** are we asking this? **What** do we *really* need to know?
  - *Example: asking about disability; do you need to know a diagnosis, or do you really need to know about barriers?*
- **How** will we use this data? Is it required? According to whom?
- **How** should we gather that data? What is the best format to use?
- **When** do you actually need this information?
  - *Will it help build trust with clients, or could it create harm? Could you ask later, after trust is established?*
- Do your forms and processes reflect your **values**?
- How many times are you asking that? Look for **repetition**.

Step 2: Check Required Reporting

Gather all of contracts and systematically organize all of your funder reporting requirements. What do you need to report when? Consider creating a calendar of due dates, and when to run which reports.

As you are looking through all of the requirements, look critically at your data—ask the same questions we outline for reviewing your forms (see box to left). Do you still need to collect that data, or was it for a funder?

Step 3: Review Other Data

What other data is being collected in your program or organization that can help tell the full story of the work you are doing? What about HR data? Staff surveys? Get creative!

Think about data from outside of your org that relates to the work you are doing. There may be public data sources (e.g., from government agencies) that can give you context and comparison data to look at your program in new ways. *Check out **Resources > Public Data Sources** on the CC website.*

Step 4: Create a Data Map

Create a map (we like a spreadsheet!) outlining all of the measures you are collecting across all of your forms, including how it is being collected, about whom, when (initially) and how often (if asked repeatedly).

Source	Measure	Options	Whom	When
Intake Form	Gender Identity	Female, Male, Nonbinary, Transgender	Adult clients	Intake
Contact Form	Topics Discussed	Mental Health, Physical Health, Housing Status, etc.	All clients	Each Contact

Data Review Step 2: Create Data Stories

Step 1: What's Your Story?

What do you WISH you knew about the work you are doing? About your clients? About your staff? Not just because the funder asked for it, but because you want to make data-informed decisions and stay innovative for your clients. Start to put together the story you wish you could tell about the work you are doing. Good places to start:

- **Vision/Mission:** what are our goals with this program? How will we know when we're achieving them?
- **Theory of Change:** What are the short-, medium-, and long-term changes we are trying to make with our program?

Step 2: Define Success

How do WE define success, even if it differs from the definitions given by our funders, model, etc.? How do we know when our program is being successful? We find it helpful to try a thought exercise.

We know we are being successful when:

- Children are…
- Staff are…
- Clients leaving incarceration are…
- BIPOC clients are…

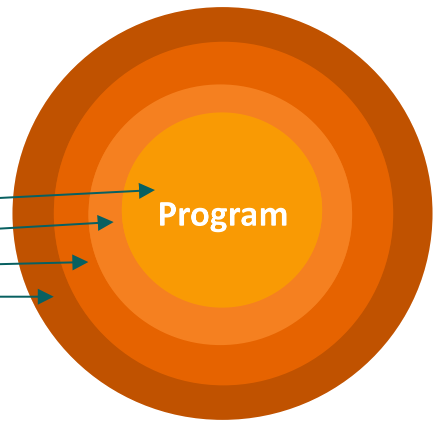
Try the thought exercise for each of the key groups you serve with your program.

Step 3: Define Your Audiences

Who wants to hear your story? Who NEEDS to hear your story? Think about your program being in the center of the circles. Your program is embedded within an organization that probably needs to hear parts of your story. You are also embedded in community, and more broadly, funders, models, and policy makers. Brainstorm all of the audiences you want to have hear your story so you can make sure you are collecting data that makes sense for that audience. Audiences may include:

- **Direct:** supervisors, program staff, clients
- **Internal:** Board, development, other programs in org
- **Community:** other programs, partners, referral sources
- **Funders/Program Models:** current and potential funders

Considering the short-, medium-, and long-term changes you want to impact, with whom would you share your story? What would you say?



Step 4: Create Your Data Stories

After you determine your audiences, think about what you want/need to tell them, and the best way to share that data with them so they can accomplish the goal you have for them. We find it helpful to use another thought exercise, using the following formula, thinking about what your data goals may be, such as to demonstrate, celebrate, elevate, advocate and/or innovate.

As a _________________ I need to know _________________________ so that I can ___________________________________

- As a ***home visitor***, I need to know ***if my client's ASQ-3 score has increased*** so I can ***know if our interventions work.***
- As a ***potential client***, I need to know ***if the program is helping families like mine to achieve their goals*** so I can ***make an informed decision about investing in the program***.
- As a ***grant writer***, I need to know ***common barriers to permanent housing*** so I can ***write a grant to start a program***.
- As a ***program manager***, I need to know ***which families are more/less likely to graduate*** so I can ***adapt the program***.
- As a ***legislator***, I need to know ***disparities impacting families*** so I can ***support legislation to address root causes***.

Final Step: Bring it All Together!

Add your data stories to your data map to look for gaps—what is missing? What new things do you need to ask? What do you need to ask differently? What forms will you need to add/update? No need to tackle it all at once; take steps to make sustainable changes!