Stages of the Data & Tech Journey

Beginning

"What skills, tools, and goals do we need to do credible data work?"

Emerging

"What data needs to be collected to inform our work, and where can we get that data?"

Insight-Driven

"Why do outcomes look the way they do, and how can we use data to adjust our program strategy?"

Integrated & Holistic

"How can we use data to direct resources and influence community outcomes?"

Foundation of Trust

Community knowledge and relationships lay the foundation for trust as organizations begin building their data and tech practices.

Partners see that data and tech can help communities and that unfavorable data is reflective of systemic conditions, not personal or programmatic failure.

The organization has the ability to help communities, partners, and teams interpret data and understand why it matters or what it reveals.

The organization fosters a culture of empowerment and support (with resources or time) for the community, partners, and team members to use, interpret, and act on data.

Roles & Responsibilities

Data and tech tasks are handled by available team members if capacity allows.

One part- or full-time person is officially or unofficially responsible for data or tech.

One or more people hold a part- or full-time data role, and the organization is investing in data and tech skills and capacity across non-data roles.

One or more people hold a part- or full-time data role, and there's recognition that "everyone's a data person" with investment in building data literacy and capacity across the organization.

Partner & Community Engagement

Building the relational foundation with community and partners that makes data sharing possible.

- Community Residents
- Community Partners
- Funders
- Policymakers

Providing transparency around how data and tech are used, and creating channels to seek community input.

- Community Residents
- Community Partners
- Funders
- Policymakers

Establishing formal or consistent community advisory and feedback structures.

- Community Residents
- Community Partners
- Funders
- Policymakers

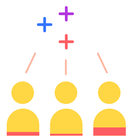
Engaging multiple partners and community residents in governance structures.

- Community Residents
- Community Partners
- Funders
- Policy Makers

Key Building Trust/Relationships · Keeping Informed · Engaging Reciprocally

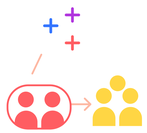
Data & Tech Team Structure

Circle the box that best describes who handles data and tech work at your organization:

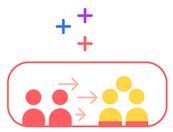


Available team members handle data and tech tasks if capacity allows

We have one part or full-time person who is responsible for data and/or tech work



One or more people hold a part or full-time data role and/or we are investing in data and tech skills and capacity across non-data roles



One or more people hold a part or full-time data or tech role, and we invest in building data and tech literacy across the organization because we recognize "everyone is a data person"

Partner & Community Engagement

How does your organization engage the following groups in data strategy, collection, interpretation, and use? Briefly describe current practices or approaches.

A **Staff & leadership** – internal team members across roles and levels

B **External partners** – schools, government agencies, service providers

C **Community residents** – the people most directly impacted by your work

D **Other stakeholders** – funders, policymakers, advisory boards, etc.

Data Strategy & Vision

For each statement, mark the response that best reflects your organization today.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	Notes & Explanation
We have a shared vision for how data should be used to advance our mission and priorities.	○	○	○	○	○	
We have a shared definition of what "data" means across our organization.	○	○	○	○	○	
Our leadership actively champions data and tech as core to how we make decisions.	○	○	○	○	○	
We use data and tech in ways that are equitable, ethical, and respectful of the communities we serve.	○	○	○	○	○	
We have adequate capacity and resources (e.g., staff time, funding, tools) to effectively execute on our data and tech priorities.	○	○	○	○	○	

Organization: _____ Participant Name(s) & Roles: _____

Review each row of the rubric, moving left to right across the rows (not top to bottom in columns). In each row, put a check mark in the box that best represents your organization's current state. You should put only **one check mark per row**. If your team wants to capture additional context, nuance, or details, add them to the notes section on the far right of each section.

The Data & Tech Journey		Beginning	Emerging	Insight-Driven	Integrated & Holistic	
Section 1 How you **collect data**	Collection Systems	☐ Uses various systems for collecting data across teams or individuals	☐ Establishes systems for partners to submit or share data on a regular cadence (e.g., through forms)	☐ Implements some automated workflows (e.g., APIs, scripts) to integrate or pull data	☐ Automates data pulls and integrates data from multiple sources via APIs or agents	**Notes:**
	Data Granularity	☐ Utilizes publicly available datasets	☐ Works with population-level data from partners	☐ Compiles data from multiple sources (e.g., schools, government) and displays in various ways (e.g., GIS maps, asset inventories)	☐ Collects and uses PII/PHI* responsibly; may access and use longitudinal cohort data (e.g., state longitudinal data (SLDs))	
	Primary Data Collection	☐ Collects data through anecdotes or informal conversation	☐ Collects data through surveys and intake forms, mapping findings to relevant indicators	☐ Collects structured qualitative data (e.g., focus groups) and uses informed consent practices	☐ Collects and contextualizes data through interviews, focus groups, etc.	
Section 2 Where and how you **store data**	Storage Mechanism	☐ Stores files in a shared drive, physical forms, personal drives, and email	☐ Establishes and consistently uses a shared cloud environment for document and data sharing	☐ Houses program data in a system matched to how the organization uses it (e.g., a database for case management)	☐ Uses a data warehouse with ETL (Extract, Transform, Load) pipelines/automation	**Notes:**
	File and Knowledge Management	☐ Relies on individual staff to hold institutional knowledge; different versions of the same file may exist	☐ Maintains a single source of truth for mission-critical documents and data sources	☐ Preserves historical data and clarifies retention and deletion practices	☐ Maintains clear data lineage from source through transformation to reporting	
	Storage Conventions and Processes	☐ Uses various naming, folder, and storage practices	☐ Establishes naming conventions, data definitions, and folder hierarchy	☐ Ensures all team members use consistent data storage and file management practices	☐ Standardizes formats across all data sources for interoperability, analysis, and exporting	
Section 3 How you **govern data**	Data Sharing	☐ Handles data sharing through informal arrangements	☐ Formalizes data sharing agreements with key partners	☐ Uses data sharing agreements with all relevant partners; establishes project-specific data committees	☐ Creates partnership-wide data committees to inform governance, shared decision-making, and program strategy	**Notes:**
	Data Quality and Cleaning	☐ Reviews data quality or errors as issues arise	☐ Cleans data manually using a documented checklist or process	☐ Establishes systems and processes for data cleaning, ownership, and quality review	☐ Automates data quality checks and anomaly flagging	
	Security	☐ Implements account security practices (e.g., Multi-factor authentication (MFA))	☐ Implements role-based permissioning to sensitive data	☐ Maintains access logs and encrypts sensitive data	☐ Documents and adheres to comprehensive access, security, and permission controls	
	Privacy	☐ Does not collect or store PII/PHI	☐ Recognizes when relevant regulatory compliance standards (e.g., FERPA) apply	☐ Aligns practices, processes, and AI usage to regulatory standards like FERPA, and engages vetted vendors to manage PII/PHI risks	☐ Documents practices for responsible AI/agent use (e.g., bias auditing, human-in-the-loop) and responsibly manages PII/PHI	
Section 4 How you **analyze and interpret data**	Type of Analysis	☐ Runs descriptive analyses in spreadsheets	☐ Analyzes aggregated data using low-code or visualization platforms (e.g., Airtable, PowerBI)	☐ Analyzes disaggregated data (e.g., by race and gender) and layers in different types of data (e.g., GIS maps, asset maps, qualitative data)	☐ Connects community outcomes to specific programmatic decisions and investments	**Notes:**
	Internal Use of Data	☐ Generates analyses when staff, leadership, or partners ask for specific information	☐ Shares and reviews synthesized data with leadership and board on a regular cadence	☐ Uses data consistently to inform internal decisions	☐ Uses data across most or all internal decisions and supports non-data or tech roles to leverage data effectively	
	External Use of Data	☐ Compiles point-in-time metrics for grants and reports	☐ Establishes and monitors year-over-year trend lines	☐ Contextualizes population level outcome indicators with comparative quantitative and qualitative data	☐ Seeks to understand and track long-term impact (e.g., using longitudinal cohort data)	
Section 5 How you **communicate data to others**	Format and Approach	☐ Shares updates and communicates impact via conversations, grants, or reports	☐ Publishes public dashboards with population-level outcomes	☐ Tailors data, analysis, reports, and communications based on audience, and uses asset-based framing	☐ Makes dashboards and raw data available for select partners to explore or use on their own	**Notes:**
	Storytelling and Reporting	☐ Communicates impact using counts and percentages	☐ Pairs quantitative metrics with narrative stories (e.g., in blogs)	☐ Highlights the relationship between programmatic decisions and population-level outcomes in reports and narratives	☐ Empowers community partners and residents to co-develop and share stories	

* PII = Personally Identifiable Information. PHI = Protected Health Information

Self-Evaluation Results

Referring to the first page, tally the number of checks for each stage (e.g., Beginning) per section (e.g., How you collect data). Then total each column in the bottom row.

Section	Beginning	Emerging	Insight-Driven	Integrated & Holistic
How you **collect data**				
Where and how you **store data**				
How you **govern data**				
How you **analyze and interpret data**				
How you **communicate data to others**				
Totals				

Reference box

Your Journey Stage

Star the stage that has the highest number from the **totals row**. This is your organization's overall stage in the Data & Tech Journey.

Beginning

Your organization is focused on building trust with partners and community residents and reporting to funders. You have informal systems for collecting, storing, and managing your data, and are exploring what tools and skills help you do credible data work.

Emerging

Your organization is building out the structures and processes to collect, manage, and analyze data consistently across the team. You are working with partners, community residents, and funders to use data to influence community outcomes.

Insight-Driven

You are using data to probe deeper into your work and adjust your strategy based on what you're learning. You're working with a range of partners to leverage multiple types of data effectively.

Integrated & Holistic

Your organization has integrated data across systems and partners, and uses advanced tools and processes for analyzing and interpreting data. You use data consistently to direct resources, influence outcomes, and even build field capacity.

Tool & Tech Inventory

For each tool category, check the box if your organization currently uses it in some capacity. In the notes section, write in the specific tool or platform your organization uses.

Tool Category	Do you use a tool in this category?	What specific tools or platforms do you use?
Surveys/Forms (e.g., SurveyMonkey, Google Forms, Microsoft Forms, Qualtrics)	☐	
Spreadsheets (e.g., Excel, Google Sheets)	☐	
Document Sharing Platforms (e.g., SharePoint, Google Drive)	☐	
Presentations (e.g., PowerPoint, Google Slides)	☐	
CRMs (e.g., Salesforce, Casebook, Apricot, OutcomeTracker)	☐	
BI & Visualization Tools (e.g., PowerBI, Tableau, Esri GIS)	☐	
AI Chatbots / LLMs (e.g., Gemini, Claude, Copilot, ChatGPT)	☐	
Database Management Systems (e.g., MySQL, PostgreSQL)	☐	
Low/No-Code Platforms (e.g., Airtable, Notion, Zapier, Tadabase)	☐	
Cloud Infrastructure (e.g., Azure, DigitalOcean, AWS, Google Cloud)	☐	
Data Warehouses & Integration (e.g., Snowflake, Microsoft Fabric, Fivetran, Databricks, Google BigQuery, Amazon Redshift)	☐	
Statistical & Analytical Tools (e.g., R, Stata, Python)	☐	
AI Agents / Workflow Automation	☐	

Data Use Inventory

For each checked item, write the data sources you use.

How does your organization use data?	Description	What types of data do you use for this?
☐ **Public reporting**	Developing dashboards and reports on cradle-to-career indicators and outcomes	
☐ **Research & policy analysis**	Investigating drivers of outcomes to inform local and state policy	
☐ **Strategy prioritization**	Using data to understand what strategies drive outcomes and where to focus	
☐ **Program evaluation**	Evaluating program impact and effectiveness	
☐ **Continuous improvement**	Providing feedback and data so teams can test, adjust, and iterate on interventions in real time	
☐ **Grant & funder reporting**	Using data to demonstrate progress and accountability to funders	
☐ **Partner data sharing**	Sharing data with partners to coordinate services, track progress, or support shared goals	
☐ **Case management**	Making sure the right individuals get the right support at the right time	
☐ **Community resource directories**	Outlining the services, resources, and programs available to communities	

Reference box

Types of Data

Population-level data

- American Community Survey (ACS) / Census data
- State outcome data (e.g., kindergarten readiness, graduation rates)
- Public health data (e.g., county, state level)
- Aggregated, anonymized longitudinal data

Program-level data

- District or school data (e.g., anonymized attendance records)
- Service delivery or participation data (e.g., enrollment in programs)
- Community qualitative data (e.g., lived experience)

Individual-level data

- PII (Personally Identifiable Information)
- PHI (Protected Health Information)
- Longitudinal cohort data (individualized or de-anonymized data)
- Case management information (e.g., referrals, services received)

Systems-level data

- Fiscal information (e.g., funding flows, investments)
- Policy and legislative data (e.g., program eligibility)
- Community assets (e.g., programs, services, and organizations operating in a geography)

Our Commitments

Based on this assessment, what are 3 actions your team will take in the next 3–6 months? Note who will lead each and what support or resources would help you follow through.

1 **Action:**

Who will lead: Support / resources needed:

2 **Action:**

Who will lead: Support / resources needed:

3 **Action:**

Who will lead: Support / resources needed: