3 ▶ DATA CHANGE MANAGEMENT

Required reference materials

• Any materials related to your data management infrastructure

What topics and questions will this module explore?

• How should we modify decision making processes as well as timelines for making those decisions?

• How do we go about identifying necessary changes and implementing these changes in a way that is feasible, predictable, productive and well communicated?

• How will changes to our data management benefit our organization and the families we serve?

How does this relate to data governance

Many organizations already have data systems and management protocols that they rely on. However, your organization may be looking to improve, adapt and perhaps even add aspects to your current data management infrastructure. This module will guide you through thinking about changes to existing practices and developing a system for how to continually change your data governance practices to reflect organizational priorities.

HOW DO I IDENTIFY WHAT NEEDS TO BE CHANGED?

1. Consider your current data management systems:

   a. How do data get collected and put into these systems?

   b. What are three to five things you like about the way these systems work?

      i. Does it allow you to collect a particular type or topic of data that is pertinent to your organization's work? Can you describe this more?

      1
      2
      3
      4
      5

   Notes and comments:

2. Think about the following areas of concern and whether they apply to your organization. Rate each statement on the agree/disagree scale and utilize the notes section for any additional comments.

   a. The data collected are directly relevant to the type of work our organization does. If our organization is interested in improving students' school outcomes, the organization collects data on their test scores.

☐	☐	☐	☐	☐
Strongly Disagree	**Disagree**	**Somewhat True**	**Agree**	**Strongly Agree**
This statement does not reflect our practices at all; we need to build this practice from scratch.	This statement does not reflect our practices; we could do much better here in terms of building out our practice and implementing critical changes.	This statement somewhat reflects our practices, but we have some important changes that need to be made to get where we want to be.	This statement is true of our organization; we just need to adjust a few small things to get it the way we want, but these changes are not pressing or necessary for functionality.	Our organization reflects this statement and we do not need to make any changes.

Notes and comments:

_____

   i. If you don't agree, how can you adapt the topics/questions/data points your organization collects in order to be directly relevant to your work?

_____

b. Data collection occurs at regular time points, frequent enough to continually inform our work.

☐	☐	☐	☐	☐
Strongly Disagree	**Disagree**	**Somewhat True**	**Agree**	**Strongly Agree**
This statement does not reflect our practices at all; we need to build this practice from scratch.	This statement does not reflect our practices; we could do much better here in terms of building out our practice and implementing critical changes.	This statement somewhat reflects our practices, but we have some important changes that need to be made to get where we want to be.	This statement is true of our organization; we just need to adjust a few small things to get it the way we want, but these changes are not pressing or necessary for functionality.	Our organization reflects this statement and we do not need to make any changes.

Notes and comments:

i. If you don't agree, are there particular areas of interest where you'd like more regular data collection? How frequently?

c. The data collected is comprehensive in terms of what our work requires, including data required by our reporting mandates and funders.

☐ ☐ ☐ ☐ ☐

Strongly Disagree	Disagree	Somewhat True	Agree	Strongly Agree
This statement does not reflect our practices at all; we need to build this practice from scratch.	This statement does not reflect our practices; we could do much better here in terms of building out our practice and implementing critical changes.	This statement somewhat reflects our practices, but we have some important changes that need to be made to get where we want to be.	This statement is true of our organization; we just need to adjust a few small things to get it the way we want, but these changes are not pressing or necessary for functionality.	Our organization reflects this statement and we do not need to make any changes.

Notes and comments:

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i. Considering your organizational needs, what other topics/questions/data points do you need to collect?

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ii. Consider your current reporting mandates. Which of these required reporting areas is your organization not fulfilling in the ways that you need to? What kind of data would you need to collect in order to fulfill this mandate?

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d. We often refer to data outcomes to improve our programming and organizational practices. (This also means that data are efficiently analyzed and reports are shared throughout the organization.)

☐	☐	☐	☐	☐
Strongly Disagree	**Disagree**	**Somewhat True**	**Agree**	**Strongly Agree**
This statement does not reflect our practices at all; we need to build this practice from scratch.	This statement does not reflect our practices; we could do much better here in terms of building out our practice and implementing critical changes.	This statement somewhat reflects our practices, but we have some important changes that need to be made to get where we want to be.	This statement is true of our organization; we just need to adjust a few small things to get it the way we want, but these changes are not pressing or necessary for functionality.	Our organization reflects this statement and we do not need to make any changes.

Notes and comments:

i. If you don't agree, what measures does your organization need to take so that staff find it helpful to refer to data reports in order to continually improve organizational practices?

You might consider:
- Do data need to be analyzed differently?
- Do the data reports need to capture certain topics that they don't capture now?
- Do reports need to be made more accessible?
- Do you need a structured space to collaborate on how to make lessons learned from data a part of improving programming?

3. Based on your answers to Q2, what are three to five things that you want your data system to do better? Try to be as detailed and thoughtful as possible in this answer.

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-
-
-

a. Why are these changes important to your organization's success? In addition to organizational functionality, consider how these changes will benefit the families and children you work with.

b. Are there any reporting mandates that you are currently <u>not</u> fulfilling as efficiently as you'd like to?

c. Is there anyone else you need to consult or inform about these areas for improvement?

d. Think about <u>feasibility</u>. How can this change to data collection and management be implemented? (For example, change wording of a particular question on the intake sheet to directly target the organization's area of work.)

e. What is a <u>realistic</u> time frame for implementing these changes?

☐ One month

☐ Six months

☐ One year

☐ Two years

☐ Five years

☐ 10 years

☐ Other: _____

DATA GOVERNANCE PROTOCOL TEMPLATE:
DATA CHANGE MANAGEMENT

> ☀ This is useful content to include as a part of your final data governance protocol.

Now, let's consider how you would go about implementing a system to continually strengthen data collection and management, based on the areas for improvement you identified above. **A good rule of thumb is to review data and collection systems at least once every six months.**

- If your organization does this already, think about what works and what doesn't.

- If your organization doesn't do this, consider making this a key aim of your data management protocol. (Write down notes for how this could benefit your practice.)

A regular check-in (at least every six months) will align all staff members to organizational goals, identify gaps in data collection and develop more thorough and precise measures for data collection, which in turn enables continued organizational success. If your team does not already have regular check-ins in place, discuss implementing at least a six-month check-in system.

When developing a protocol for data change management, consider the following questions:

1. With whom do you need to communicate during this check-in (frontline staff, directors, data or IT teams, leadership)?

- _____

- _____

- _____

- _____

- _____

- _____

- _____

2. What will be an effective data change check-in meeting structure and objective(s) for your organization's needs?

Before filling in your answer, consider *how* your organization's individuals and teams need to be presented with data change information that can later be dispersed effectively. Think about the following prompts in order to establish what these data change check-in meetings could look like:

a. Will frontline staff have already discussed suggested changes with directors?
☐   YES   ☐   NO

- Does this need to happen at the data change check-in meeting?
☐   YES   ☐   NO

- What is the best way of communicating this?

b. Will these directors have already communicated with data/IT teams about changes?
☐   YES   ☐   NO

- Does this need to happen at the data change check-in meeting?
☐   YES   ☐   NO

- What is the best way of communicating this?

c. Will directors and data/IT have already discussed necessary changes with leadership?
☐   YES   ☐   NO

- Does this need to happen at the data change check-in meeting?
☐   YES   ☐   NO

- What is the best way of communicating this?

Use the space below to provide a complete picture of the structure and objective(s) of your data change check-ins:

3. How will you communicate necessary areas of change to the organization? Consider the following before providing your response:

    a. Who needs to know? How will you tell them?

-     _____
-     _____
-     _____
-     _____
-     _____

    b. What organizational materials need to be updated accordingly (e.g., data governance protocol, training manuals, data reports)?

-     _____
-     _____
-     _____
-     _____
-     _____

Use the space below to provide additional notes on your data change communications plan:

4. What aspects of your data do you need to review during this meeting? Key areas include those below, but you should feel free to add more or expand on these categories.

    ☐ Data collection relevance (Are you collecting data that directly relate to your organization's programming target population and vision/mission?)

    ☐ Regular data collection

    ☐ Data collection comprehensiveness (including required reporting mandates)

    ☐ Continual improvement practices (including analytical strategy and data management)

- _____
- _____
- _____
- _____
- _____

5. Are there any changes or areas for improvement?

- _____
- _____
- _____
- _____
- _____

    a. Why are these changes important to your organization? In addition to organizational functionality, consider how these changes will benefit the families and children you work with.

    b. When can the changes feasibly happen?

        ☐ One month

        ☐ Six months

        ☐ One year

        ☐ Two years

        ☐ Five years

        ☐ 10 years

        ☐ Other: _____

6. At the end of this meeting, what are the three to five most important aspects of data collection and management your organization needs to focus on improving or changing?

1. _____

2. _____

3. _____

4. _____

5. _____

a. Who is responsible for overseeing the changes?

- _____

- _____

- _____

- _____

- _____

b. Who is responsible for updating the data governance protocol (and/or any other materials identified) with these modifications?

- _____

- _____

- _____

- _____

- _____

Moving forward:

- At the beginning of the next check-in, make sure to circle back to the points identified in your protocol template for data change management.

- Discuss where you stand with each area of improvement.

- Most importantly, make sure your protocol has been updated.

DATA GOVERNANCE PLANNING TOOL KIT — DISCUSSION NOTES

Please use this space to take notes on important points you and your team discussed. You may also want to include a list of any references or additional resources you used to complete this module or that you think are relevant to developing a data governance protocol based on this module.

Notes:

Resources and references:

1

2

3

4

5

6

7

8

Notes:

Resources and references:

1

2

3

4

5

6

7

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