1) Consult Data Experts

Meet with and gather information from those individuals with any knowledge or information on the topic of interest.

☐ Determine what metrics are available
☐ Review data for completeness and accuracy
  - How often is the data refreshed?
  - How is the data packaged (Paper? Spreadsheet? Typed text?)
☐ Begin to brainstorm what metrics should be included based on the story you are trying to tell
☐ Determine stakeholders
  - Who controls the data?
  - Who is impacted by the data?
☐ Determine if information has been tracked/measured historically and how

2) Meet with Stakeholders

Meet with and gather information from those individuals who are directly impacted by the information or data; this can include consumers, program staff, or external funders.

☐ Get stakeholder input on what metrics would be most beneficial and actionable to them and help them align with larger goals
☐ Determine if benchmarks or targets exist for potential metrics
☐ Determine available and needed resources in order to make gathering the data process as little of a burden as possible
☐ Review how data is entered with people who enter it
☐ Determine timeline for process
☐ Determine audience for the report

3) Create a Prototype

Based on the collaboration process thus far, draft a preliminary report or deliverable.

☐ Ensure all data is accurate and up to date (include date pulled in report)
☐ Design clear and concise depictions of data
☐ Create and disperse a proof of concept
Pilot Prototype

Share a preliminary version to get feedback/process improvement ideas before wide scale distribution.

☐ Share with a small group of stakeholders
☐ Get feedback on how useful and actionable the report is
☐ Gain context of data from stakeholders
☐ Ensure data is easily understood and clear
☐ Gather preliminary data/information to increase buy in from external stakeholders and leadership
☐ Ensure data supports goals of stakeholders
☐ Create a set of instructions of guidelines for internal consistency

Monitor Distribution

Determine logistics of how the report or data will be distributed.

☐ Determine a continual report dissemination plan (i.e. email, in person)
☐ Determine frequency and recipients

Follow up with stakeholders

Have a continual method of receiving feedback as priorities and needs are constantly changing.

☐ Determine process for continual feedback on report
☐ Determine method of communication for stakeholders to ask questions and have open discussion on data and findings
☐ Ensure continual dissemination to all stakeholders (continual reassessment of stakeholder list)
COLLABORATION, MONITORING, & INTERNAL COMPLIANCE REPORT CYCLE

7) Continually Monitor Data

*Data should be monitored at the detailed level to determine if there is anything that needs to be followed up on or needs more information.*

☐ Create method for identifying red flags when data is collected/analyzed

☐ Determine process of following up on critical findings

8) Implement Process Improvement

*Utilize the data to improve processes and programs.*

☐ Utilize findings to set action items to improve programs/systems you are reporting on

☐ Ensure follow up on needed improvement

☐ Collaborate with various departments internally and externally to ensure data informed improvements are successful

9) Reevaluate Report

*Routinely revisit report or data to make sure it is measuring and showing information in the most accurate, relevant, and timely way.*

☐ Continually reassess report as needs and metrics change

☐ Continue to meet with stakeholders to ensure report is useful and meaningful
COLLABORATION, MONITORING, & INTERNAL COMPLIANCE REPORT CYCLE

References


