Data Inventory Worksheet

Organization: _____

Date: _____ **Completed by:** _____

List the data your organization currently collects. Don't edit yourself, and include informal sources.
For each source, answer the three questions across the columns.

Data type or source	Who collects it & how often	How it has been (or could be) used

Reflection Questions

1. Which data sources are most underused? What would it take to use them more intentionally?

2. Are there two data sources you could combine to answer a question you can't currently answer alone?

3. What is one data source you could start using differently in the next 30 days?

Pulse Survey Template

Before You Write Any Question

Answer these four questions first. If you can't answer #4, revisit whether the survey is the right tool at this time.

What program, service, or campaign will I survey?	
What do I most need to know right now?	
Who will fill this out, and when?	
What will I actually do with the results?	

Respondent Introduction

Write this before writing your questions. Keep it to 2 - 3 sentences.

We are asking [# of questions] short questions about [program name] to help us understand what is working and where we can improve. Your responses are [anonymous / shared with staff only]. This should take [X] minutes. Thank you.

Your version:

Draft Your Questions

Aim for 3 to 5 total questions. Use a mix: 2 to 3 scale items and 1 open-ended question.

#	Question text	Scale anchors or "Open"
Q1		
Q2		
Q3		
Q4		
Q5		

Pre-Send Checklist

Before you launch the survey, check each of these:

☐	Every question is in plain language (could a 6th grader understand it?)
☐	There are 5 questions or fewer
☐	You have decided when and how you will administer it (in person if possible)
☐	You know who will see the results and by when
☐	You know what you are willing to change based on what you learn
☐	You have a plan to share results back with respondents (even briefly)

Low-Lift Habits Refresher

When	Habit	What it looks like & tips for getting started
Monthly	**Monthly data check-in**	15 minutes at a staff meeting to look at one metric together. Not to analyze deeply, just notice what's there. How to start: Put it on your next staff meeting agenda. Pick one number to look at first. Set a 15-minute timer for discussion.
At intake	**One question at intake**	Add a single open question to your intake process. For example, "How did you hear about us?" or "What's the issue that brought you to us?" How to start: Draft your question, and add it to your intake form or welcome materials.
Per cohort	**End-of-program exit or pulse check**	3 to 5 questions administered on the last day. Capture it in the room while you have people there; don't wait to email it afterward. How to start: Write the survey before your next cohort ends. Print or link to it in advance.
Quarterly	**Case note pattern review**	Pull 10 random case notes (meeting summaries, action reports, etc.) and look for themes. What comes up repeatedly? What is missing? How to start: Block 30 minutes at the end of this quarter. Block it on your calendar, and don’t schedule over it.
Ongoing	**The 'Aha!' log**	A shared document or chat location where staff jot down surprises, barriers, and wins as they happen. How to start: Create a Google Doc. Share it at your next staff meeting and explain how it works. Plan to look at it at upcoming staff meetings as a group.

Impact Sentence Worksheet

Data become meaningful when connected to your mission and your people. Use this worksheet to build a data-informed impact statement for one of your programs or campaigns.

The Impact Sentence Formula

In [time period], [your org] served/engaged [# people] through [program or campaign]. [X%] reported/achieved [outcome]. This matters because [why it connects to your mission].

Step-by-Step

Step 1: Start with your outputs

In _____ (time period), _____ (your org) served/engaged _____ people through _____ (program).

Step 2: Add an outcome

Of those, _____% reported / achieved / demonstrated _____ (outcome — what changed for them).

Step 3: Add the "so what"

This matters because _____ (why this connects to your mission and to the people you serve).

Step 4: Put it together

Write it as 1-3 complete sentences. Read it out loud. Is it compelling? Would someone who knows nothing about your organization understand why this matters?

Examples

Service delivery

"Last year, 85 individuals accessed emergency financial assistance. 72% avoided eviction, and 60% remained stably housed six months later. Housing stability is the foundation on which other services and supports are built."

Advocacy & organizing

"In our fall campaign, 320 community members contacted their legislators. 68% of them were from the zip codes most directly affected by the proposed policy. This supports what we have repeatedly seen — people with the most at stake are driving the fight."