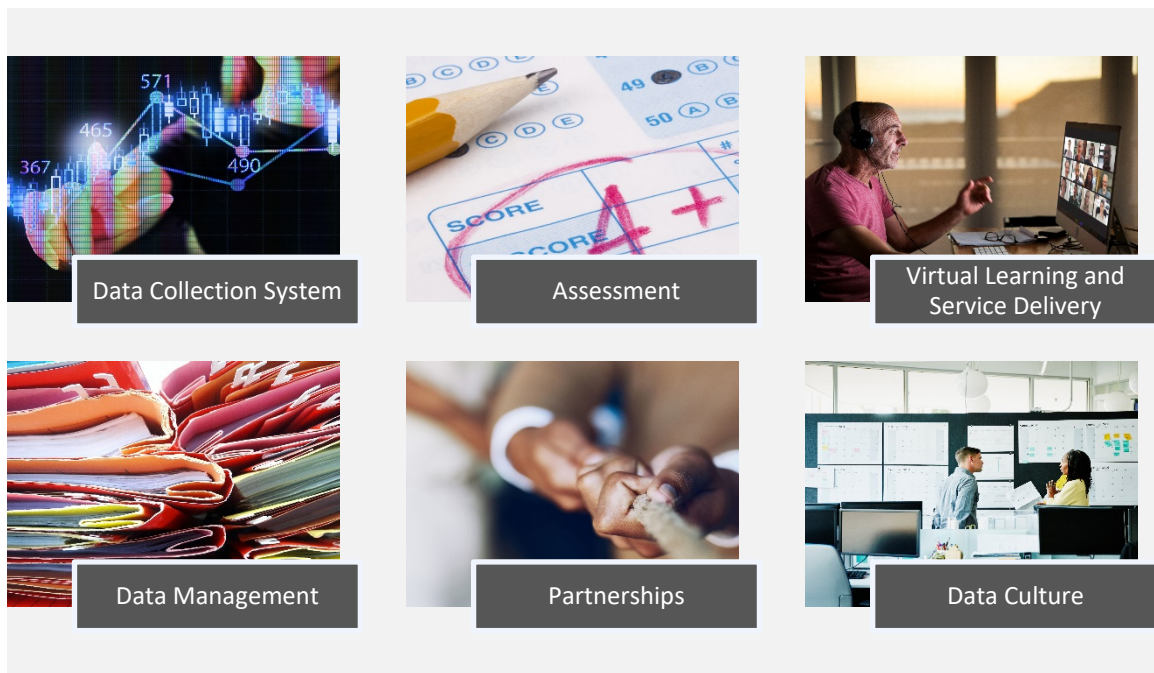# The First 90 Days: A Checklist for New NRS Data Leaders

Being an NRS data leader can be one of the most important, challenging, and interesting jobs you will ever have. As with many jobs, it comes with a sharp learning curve. This tool will help you develop a strategic plan for the first 90 days in your role. Your plan will reflect your review and assessment of several components of your program:

Data Collection System	Assessment	Virtual Learning and Service Delivery
Data Management	Partnerships	Data Culture

Using this checklist, you will:

- Clarify and describe your role as an NRS data leader.

- Set near-term and long-term goals for your role and program.

- Identify and assess processes and resources that will support data quality and use.

- Identify data strengths to position your data teams and programs for success.

- Identify areas for improvement in data leadership for yourself and your programs.

The checklist breaks down major tasks for each component into three, manageable 30-day increments:

- The First 30 Days: Learn the Lay of the Land.

- The Second 30 days: Assess Data Quality and Use in Your Program and Identify Goals.

- The Third 30 Days: Develop a Strategic Plan for Meeting the Identified Goals.

The First 30 Days: Figure Out the Lay of the Land

Start date: _____   End date: _____

The first 30 days are a busy time and a great time to get your footing. If you are new to adult education, you may have a million questions, or you may not even know where to start. The following is a suggested list of activities to establish an understanding of how data are collected and managed in your program. Each activity can be completed in 1–2 hours.

Tasks you will accomplish during the first 30 days:	Target completion date
1. Familiarize yourself with the National Reporting System for Adult Education (NRS).	
2. Learn about the data requirements under the Workforce Innovation and Opportunity Act (WIOA).	
3. Familiarize yourself with your data system.	
4. Familiarize yourself with your state's requirements for assessment and reporting.	
5. Outline the data flow for your state.	
6. Complete a data stakeholder analysis.	

First 30 Days Task Details

1. Familiarize yourself with the National Reporting System for Adult Education (NRS).

- Listen to the NRS Podcast: Past, Present, Future.
- Read the first chapter of the NRS *Technical Assistance Guide.*
- Scan NRSWeb, the website for the NRS support project.

Check for understanding: How would you describe the NRS to your data team? To program administrators? To instructors? To students?

2. Learn about the data requirements under the Workforce Innovation and Opportunity Act (WIOA).

- In the NRS *Technical Assistance Guide,* read "Chapter II, National Reporting System Primary Indicators of Performance, Measures, and Data Collection."
- Review the NRS Foundations Toolkit for quick access to key WIOA resources.

Check for understanding: What are the key NRS data requirements?

3. Familiarize yourself with your data system.

- Note your data system provider and administrator(s), how to access the data system, and the data reports available to you.

4. Familiarize yourself with your state's requirements for assessment and reporting.

- Read your state policy and procedural documents on assessment and reporting.

- Note key points, including which assessments can be used in your state, how often students should be assessed, what needs to be reported, and how often reports need to be submitted.

5. Outline the data flow for your state.

- Complete the self-paced online course, *NRS Data Flow*. Map out the flow of data to and from your state program. You must create an account, if you do not already have one, which you can do easily the first time you log in.

Check for understanding: What steps, if any, in the data flow process are you directly responsible for?

6. Complete a data stakeholder analysis.

- List your program's data stakeholders. A stakeholder can be anyone that has an interest in your program and can either affect or be affected by your program. This includes all staff, students, and external partners (such as employers, education programs, social services, etc.). You may want to include members of the community as well. Note individuals by name if possible. Indicate whether there are data sharing agreements with partners.

Data Stakeholder Analysis			
Name (Stakeholder name)			
Position (Position or title in the organization)			
Role (Function on the project)			
Contact information (Phone, email)			
Requirements (High-level needs or wants for the program)			
Expectations (Expectations of the program)			
Classification (Type of stakeholder)			
General attitude toward data (positive, negative)			
Impact (importance: low, medium, high)			
Recommended action (see stakeholder analysis matrix)			

- To complete the stakeholder analysis, use the grid/matrix below to plan for engagement of your stakeholders based on their level of interest and impact in or on data. Then, note the recommended action with the stakeholder in the table.

Stakeholder Analysis Matrix

		Engagement	
High	Keep Satisfied		Key Partners Manage Closely
Impact on Program	Monitor (Minimum Effort)		Keep Informed
	Low/ Passive		High/ Active

- **High impact, positive data attitude (Manage Closely):** Because of their potential impact on your program, expend the greatest effort here to engage these stakeholders. They can influence the beliefs and actions of others concerning data and serve as data champions in your program.

- **High impact, negative data attitude (Keep Satisfied):** These stakeholders can impact your program positively or negatively. Target your efforts to keep them (1) satisfied with your program's use of data and (2) informed about how your program benefits from data.

- **Low impact, positive data attitude (Keep Informed):** These stakeholders have less impact on the program but can lend their voices in support of data initiatives. Engage these stakeholders by sharing information with them and having regular talks to stay ahead of issues that may arise.

- **Low impact, negative data attitude (Monitor):** Relative to other stakeholders, their impact on your program is very minimal. Observe these stakeholders for changes in attitude and impact. Minimally engage them in your data use and data sharing efforts.

The Second 30 Days: Assess Data Quality and Use in Your Program and Identify Goals

Date the 30 days start: _____   Date the 30 days end: _____

Now that you have a better understanding of the foundations of data reporting and how to manage your data system, it is time to determine how well your program's approach to data serves your program's objectives and what you can do to improve the approach, if necessary.

Tasks you will accomplish during these 30 days	Target completion date
1. Select one to two areas to evaluate.	
2. Identify three to five questions to guide your evaluation.	
3. Identify three to five data-focused questions.	
4. Determine what data you will use to answer the questions.	
5. Use data to evaluate how your state is doing in the selected area.	
6. Identify data strengths that will help position your data teams and programs for success.	
7. Identify areas for improvement in data leadership for yourself and your programs.	
8. Develop a SMART goal related to the results of your evaluation.	

Second 30 Days Task Details

1. Select one to two areas to evaluate.

In the first 30 days, you gathered and reviewed a lot of information. It can be very overwhelming! As you settle into your role, you may want to work on everything at once. Instead, you're encouraged to select only one to two areas on which to focus. Don't worry! There will be plenty of time for other areas later.

- Identify specific areas of focus related to data quality and data use for further exploration over the next 30 days.

    Examples of things to consider when selecting your areas of focus:
    - What does not seem to be working the way it should be?
    - What systems or processes need to be updated?
    - What are areas in which stakeholders are struggling?
    - What needs further clarification, either for you or your stakeholders?
    - Which performance indicators are low?
    - Where do you notice possible data quality issues?

Area(s) I will be looking at in depth:

2. Identify three to five questions to guide your evaluation.

To start, you will want to develop some questions to guide your evaluation of your focus area(s). Guiding questions suggest ways to understand how things are going and what to do next. These questions focus on the who, what, and why.

- Identify your guiding questions.

  Examples of guiding questions:

  - Why is this challenge happening?
  - Is it widespread or limited to only some programs or participants?
  - Why is the data point the way it is (low/high)?
  - What performance indicators are most affected?
  - What data collection procedures go into these indicators?
  - What stakeholders are affected?
  - Who are the participants affected by or causing the challenge?

My guiding questions are:

3. Identify three to five data-focused questions.

You will also want to consider some specific data-focused questions to identify what data you need to review and how you will use data to help analyze the challenges you identified. Review, disaggregate, and analyze the data to help understand the challenge.

  Examples of data-focused questions:

  - Review and disaggregate the data.
  - Is [X] lower or higher for groups of participants or programs? Why?
  - Examine program and data collection and reporting procedures.
  - What are programs doing that affects the data and challenge?
  - What data will we examine to understand procedures?

My data-focused questions are:

4. Determine what data you will use to answer the questions.

Which data will you need to collect, review, and analyze to answer your data-focused questions? Some data may already be available to you. You may need a plan to collect other data or to improve the quality of existing data. Note which data will be helpful to your evaluation and indicate whether the data are available.

Potential Data Sources	
Adult education state and program data • State data system, NRS, and state tables • National NRS database • Participant surveys	**State and program-developed data collection instruments** • Surveys, observations, focus groups, document review guides
Partner databases • Workforce agency, employment databases, supplemental wage and employment records • Community college databases: local and state, National Student Clearinghouse • Referring agency databases	**Extant databases** • U.S. Census and American Community Survey • Labor market data • Adult education research and surveys

The data I will use are:

5. Use data to evaluate how your state is doing in the selected area.

What insights were revealed by your review of the data? What data answered your guiding questions? In this section, summarize your assessment of your program's approach to data quality and data use.

Overall, this is how we're doing:

6. Identify data strengths that will help position your data teams and programs for success.

In your review of your program's data and data practices, what strengths could you identify? Strengths may include your strongest assets, resources, or skill sets related to data quality and use.

Our data strengths are:

7. Identify areas for improvement in data leadership for yourself and your programs.

What did your assessment of data quality and data use in your program reveal about areas that could be improved? Note any areas where expertise is lacking, where issues were identified by stakeholders, or where staffing levels are insufficient.

The areas in which we could improve are:

8. Develop a SMART goal related to the results of your evaluation.

Data goals are the outcomes your organization wants to achieve as a result of your data collection, management, reporting, and analysis efforts. They describe the reasons you want to ensure data quality and effective data use. These goals are what your organization aims to accomplish, whether to meet federal or state mandates, to provide services that meet local conditions, or other requirements set by stakeholders. These are broad statements that frame your action plan for the next 30 days. What end results do you want to see after executing your plan?

Writing a SMART goal is one way to ensure your goal fits within the identified constraints of your program.

SMART goals have the following characteristics:

- **Specific:** Specify what is to be achieved, by how much, and by when.
- **Measurable:** Make sure the objective can be measured—that it includes metrics and you have the resources in place to assess progress toward meeting the objectives (i.e., data are or will be available to measure progress).
- **Attainable:** Set objectives that are feasible for the agency.
- **Relevant:** Align objectives with the mission and vision of the agency.
- **Time-driven:** Establish a time frame for achieving the objective.

To determine the program goal(s) that will drive your action plan, think about what issue or situation you are trying to improve. What outcomes are you trying to achieve? You may choose goals that enhance your strengths or target areas for improvement. Write at least one SMART goal that will be the focus of your action plan for the next 30 days.

My SMART goal(s) is/are:

The Third 30 Days: Develop a Strategic Plan for Meeting the Identified Goals

Start date: _____   End date: _____

	Tasks you will accomplish during these 30 days	Target completion date
☐	1. Identify strategies for addressing a data challenge goal.	
☐	2. Create an action plan for implementing strategies to address data challenges.	

Third 30 Days Task Details

1. Identify strategies for addressing a data challenge goal.

Select a data challenge that you identified that you would like to focus on over the next 30 days. Identify one or more strategies to address the data challenge and complete this action plan for at least one of your strategies. Use this template or prepare your own.

Data challenge	
Strategy	

2. Create an action plan for implementing strategies to address data challenges.

Action Plan	
Action steps (List action steps relevant to this strategy.)	
Required resources (List the resources necessary to make the strategy a success.)	
Responsible parties (List the parties responsible for executing the strategy.)	
Affected adult education stakeholders (Identify stakeholders affected or involved in this action step.)	
Evidence of completion (List how you will know the action step has been taken or completed.)	

Action Plan	
Timeline (List due dates and key activities for completing each action step.)	
Evidence of improvement (List how you will know the action step improved or addressed the data collection issues.)	

3. Tips for Implementing Your Action Plan

Now that you have a strategic action plan, you must implement it. It is worth noting that many plans fail because of failure to implement. Implementation requires communication, resources, and follow-through. The exercises you've completed over the last 90 days have put you in a great position to implement your plan and have generated momentum you can use to move your plan forward. When put into action, your plan will not only move you closer to achieving the goals you identified, but it'll also help you to continue to learn about your organization's strengths and challenges and help you develop professionally. The following tips will help you avoid some of the common implementation challenges:

1. Ask your team to provide input on the action plan to strengthen your strategy. You will hold responsible parties accountable for implementing aspects of the plan and achieving goals, so allow them to create action items to support their assigned goals. Assign your staff to action items and SMART goals that leverage their strengths.

2. Keep the plan manageable. Take it one step at a time. Break larger tasks into smaller chunks and prioritize key actions. Integrate aspects of the plan into existing initiatives where possible.

3. Schedule regular (weekly, biweekly, monthly) meetings to review your progress with plan implementation as you work toward your goals. Be prepared to adjust the action items and parties responsible as conditions shift or if the plan isn't working. Revise the plan as needed as resources change and or as you develop new insights.

4. Track and monitor your improvement metrics. On a quarterly or monthly basis—or more often as needed—review your success metrics with your team to assess the plan and review your overall strategy.

5. Communicate the plan to stakeholders in your organization. Engage stakeholders beyond those you've identified as responsible for specific tasks in your action plan. For each action step, refer to your stakeholder matrix for notes on who to engage and how.

6. Recognize when you meet goals and celebrate!