



Module 5



Optimizing Your Current Data System

Module 5 is designed for agencies/programs who want to customize an existing data system to better meet program requirements. Once your team has chosen a system (Module 1), planned and documented the implementation of the system (Module 2), navigated the complex landscape of data ownership and privacy (Module 3), and made decisions about displaying and reporting data (Module 4), some additional “tweaks” will help to ensure you get the system you want.

This module addresses two actions related to customizing an existing system.

Assess system requirements and identify potential changes.

Many agencies have frustrations with their data systems but identifying the particular issues that require changing is difficult. Module 5 offers two tools for assessing systems: a guide for understanding best practices for system assessment and a checklist for identifying potential changes.

Plan for system improvements.

Once your team has identified areas for improvement, finding time and identifying staff to make these changes can be difficult. System changes are time consuming and expensive. Also, staff are not necessarily comfortable doing this type of work. Planning tools will help your team to carry out this work. The toolkit offers a charter template for planning an improvement effort.

Assess system requirements and identify potential changes

Tool	Type of tool	Description
5.1: Guide to Data System Self-Assessment	Guide <i>Used with Data System Assessment Checklist</i>	This guide provides a brief introduction to data system assessment. The guide describes assessment, when it should take place, and the core components to examine. It is designed to be used with the <i>Data System Assessment Checklist</i> .
5.2: Data System Assessment Checklist*	Checklist/Assessment <i>Used with Guide to Data System Self-Assessment</i>	This checklist facilitates a team conversation about the current strengths and requirements of your data system. If there are gaps in the assessment, the checklist also includes suggested enhancements or changes.

Plan for system improvement

Tool	Type of tool	Description
5.3: Data System Improvement Charter*	Template	This template is designed to be modified by teams who are interested in undertaking a data system improvement project. The charter describes objectives, goals, timelines, and benefits of an improvement project.

Visit www.tribaleval.org to download individual tools from this toolkit. Those tools marked with an * are available in modifiable forms (Word, Excel, or PowerPoint).