

Institutional Data Capacity

Worksheet 2 from *Philanthropy and the Social Economy: Blueprint 2017*

Use this worksheet to inform your thinking about what types of digital expertise you need at your organization.

1. What data does your organization have that is sensitive (personally identifiable or could be used to harm individuals if accessed inappropriately)?

- a. What staff controls are in place to protect this data?

- b. What board protocols are in place?

- c. What security protocols are in place for vendors that access this data?

2. What data do you have/rely on that is licensed?

- a. Who on your staff manages these licenses?

- b. What board practices are in place to abide by these licenses?

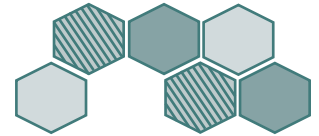
3. What data do you have that is regulated under laws about health, children, consumer protection, intellectual property, or other regimes?

- a. Who (staff and/or board) ensures compliance?

- b. How do they stay current on regulatory changes?

- c. How do they educate/inform others in the organization?

Institutional Data Capacity, continued



4. Who at your organization is responsible for data security?

a. Do they have the resources they need?

b. How is the board involved in data security practices and policy?

c. Does your board liability insurance cover data breaches? Have you updated it?

d. How is security addressed by your key vendors (IT, finance, human resources, web development, evaluation)?

5. How is your staff/board kept up-to-date on digital resource management?

a. Is digital data management covered in your employee handbook?

b. Are there professional development opportunities for staff? Trainings for board members?

6. How do you keep an eye on the future? (See worksheet 3, *Digital Data and Strategic Planning*.)

a. Do you have any board advisors who are experts on digital technology, policy, or law?

b. What resources can you access to stay aware of digital developments and who needs access to them?
For example, who knows about and who needs to know about the evolution of remote sensors in your community, or the use of algorithms by policymakers?

See digitalIMPACT.io for related tools and policies.

Directions

- Review worksheet 1, *Digital Data Inventory*, to see all the data your organization has.
- Ask department managers to answer questions 1, 2, and 3.
- Compile those answers into a single place (worksheet 1).
- Assemble managers and senior decision makers to discuss and identify priorities on subquestions a through c for questions 1, 2, and 3.
- Have senior leadership (staff and/or board volunteers) answer questions 4 and 5. Develop plans for addressing unmet needs or answering unanswered questions.
- Question 6 can be used by board recruitment committee, HR manager, and senior leadership as part of future planning.

This worksheet is part of a series focused on the use and governance of digital data in organizations, from *Philanthropy and the Social Economy: Blueprint 2017*, available at grantcraft.org/blueprint17.



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