

## TOOLKIT FOR INCREASING UPWARD MOBILITY IN YOUR COMMUNITY

# Evaluating Potential Supplementary Data Sources and Metrics

This worksheet is part of the Upward Mobility Initiative's [Toolkit for Increasing Upward Mobility in Your Community](#). Use it to evaluate potential supplementary data sources (and metrics) before investing time in collecting and analyzing additional information. Consider the following questions related to your needs, priorities, and capacity:

1. Are these data going to give you insights that you cannot find with information you already have access to?
  - a. What information gap would these data fill?
  - b. Is the information gap a high priority, or is it something that would be nice to learn?
2. Are these data available at the geography of interest to you?
3. Are these data representative of the entire community?
  - a. Could there be populations or areas that the data misrepresent or leave out because of how they are collected?
4. Are these data timely and relevant?
  - a. How far back do these data go?
  - b. Will these data continue to be collected consistently in the future?
  - c. When was the most recent collection of the data source?
  - d. Have these data been collected reliably and consistently over time?
5. Do these data exist in a format compatible with your systems and analysis capacity?
  - a. How and where are these data stored?
  - b. Does the storage method affect its accessibility?
6. Are these data housed by a partner organization?
  - a. Are they held by an organization willing to contract with your team for access and could they easily provide it?

- b. Do you have connections who could provide points of contact or access to such organizations?
- 7. Are there any data privacy laws (i.e., HIPAA) that govern the use of this data?
  - a. If yes, and it is not available at the individual level, could you ask partners to share a summary of the data?
  - b. If a high-level summary of the data is all you can access, will it still be helpful to you?

As you evaluate specific metrics or indicators within each data source, you may want to additionally consider the following questions:

1. Does this metric account for disparities or inequities in outcomes across different demographic characteristics, such as race/ethnicity, gender, socioeconomic status, or geographic location?
2. Will this metric be clear and compelling to diverse audiences?
  - a. Ask yourself if this metric would meet the “public square” test—that is, if you had to share this indicator in a public forum with a large audience, would it be clear enough for people to understand?
3. Does this metric serve as a reliable proxy for the underlying condition or set of conditions you are hoping to measure?
4. Is this metric reported on a timely and regular basis?
5. Does this metric directly capture the condition you’re interested in without relying on proxy or indirect measures?
6. Are there significant costs associated with the collection, analysis, and reporting of this metric? How do those costs compare to the value of the information provided by the metric?
7. Is this metric available at the level of granularity (for example, zip code, census tract, or something else) you need?
8. How important is this metric to your coalition’s overarching goals and priorities?