

Values Reflection Workbook

A guided exercise for nonprofit teams to name the values that should shape their data governance practice.

Handoff Package Section 1



Who This Workbook Is For

This resource is for nonprofit teams who are ready to have the conversation they have been avoiding: what do we actually believe about the data we collect, and whose values are we centering when we make decisions about it? It is for any organization that wants its governance work to be grounded in something real, not borrowed from a compliance checklist that was written for a different kind of institution entirely. Before you can govern data well, you need to know what you believe.

At ATL DataLab, we call this ***Values-Aligned Data Governance***.

What's inside:

- Part A: Your mission, in plain language
- Part B: A self-check on your current data responsibilities
- Part C: A real-world scenario where values collide
- Part D: Your draft data values statement

Before Your Get Started

Time: 20–30 minutes, solo or as a team.

Who should be in the room: This works best with a mix of perspectives — leadership, program staff, and anyone who directly interacts with participant data. If you can only get one person, that's fine too; just plan to compare notes with a colleague afterward (see page 8).

What you'll walk away with: A first draft of your organization's data values statement — two honest sentences that name what your data is *for* and what you're responsible for protecting. This isn't a policy document. It's the starting point for one.

How to format your group session

- **Digital option:** Use a shared spreadsheet (Google Sheets, Airtable, Notion) where all participants can edit simultaneously
- **Physical option:** Use sticky notes or a whiteboard; one data category per note or column
- **Hybrid option:** Work in a shared doc on screen while some participants are remote
- Assign a facilitator to guide discussion and a note-taker to capture final agreed responses

What Does Your Organization Believe About Data?

This workbook is designed to help your team begin the work of values-aligned data governance starting where it should start: with your organization's values. You can complete this worksheet individually or, ideally, as a team. Budget 20–30 minutes for a group session. There are no right or wrong answers.

Solo Reflection

Jot your responses on a separate sheet of paper, a sticky note, or as a comment in a shared document. The lines on this worksheet are a visual cue. Use whatever space works best for you.

■ Group Exercise

Each person captures their initial response privately first. You can use a sticky note, scratch paper — whatever works for you. Then share with the group. Differences between responses are the most valuable part of the conversation.

Part A: Your Mission in Plain Language

In this section, we'll talk about your organization's mission, the values you most consistently act on, and your beliefs about the information you hold.

1. In one or two sentences, why does your organization exist? Skip the official language. Write what you'd tell a stranger at a dinner party.

Example: "We help kids in our neighborhood get fed, get tutored, and get seen — because a lot of them aren't getting that anywhere else."

Part A: Your Mission in Plain Language

2. What are the 2–3 values your organization most consistently acts on — even under pressure?

Think about a hard decision you made recently. What did you hold onto? What did you refuse to compromise?

3. What do you believe about the people whose information you hold? Complete the sentence:

"We believe the people we serve deserve..."

Part B: Your Data Responsibility

Read through the list of responsibilities below. **Check all that feel true to how you deal with data right now** — not how you wish you did, but how you actually operate today.

- ☐ We collect only the data we truly need for our mission.
- ☐ We are transparent with participants about how their data is used.
- ☐ We protect data from misuse, even when it would be operationally convenient.
- ☐ We give communities some voice in how their data is collected or shared.
- ☐ We do not share data with funders or partners without thoughtful consideration.
- ☐ We delete data when it is no longer needed.

4. Is there a responsibility not listed above that your organization holds strongly?

Part C: Where Values and Data Collide

Read the scenario below and answer the two questions. There is no right answer. The goal is to surface what your organization actually believes.

The Scenario: A trusted funder asks for individualized, identifiable data about your program participants to support their own evaluation work. You currently report this information only in aggregate. The funding relationship is important to your sustainability.

5. Which of your organization's values are in tension in this situation? Name at least two that pull in different directions.

6. What would your organization most likely do, and why? Be honest. Not what you wish you'd do, but what you'd actually do given real pressures.

Part D: Your Draft Values Statement

Use your answers from prompts 5 and 6 to complete the two sentences below. Then answer prompt 7.
This is the seed of your organization's data values framework — worth holding onto.

We collect and use data in order to...

We believe our highest responsibility is to...

7. What would have to change — in policy, behavior, or conversation — for this statement to be real rather than aspirational?

What To Do With This Workbook

- | | |
|-----------------------------|---|
| If you worked alone... | Share the workbook with one colleague and compare your answers. Where you differ is where governance needs clarity. |
| If you worked as a group... | Compile the responses from your separate notes into a shared document. Disagreements are data. Don't resolve them too quickly. |
| Either way... | Use this as a warm-up for a full <i>Values-Aligned Data Governance</i> engagement, and start building your governance foundation together. |

Ready to do more?

This worksheet is the first step. Check out resources, classes, and workshops tailored for nonprofit organizations and community-based organizations at **ATLDATALAB.COM**.

ATL DataLab exists to answer a missing question in the sector:

“What should we do with the data we already have—and what does that say about who we are?”

Everything else flows from that.

