Data Story Template

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How to Use the Data Story Template

The Data Story Template is a planning tool designed to help you clarify your purpose, audience, and evidence before creating a data story about your organization or program's initiatives. Use it to map key data points, goals, relationships, and timeframes, and to check that your story is cohesive, well-supported, and feasible given your timeline and capacity.

Step 1. Identify Your Goals

Why are you telling your data story?

(Select all that apply and describe briefly.)

- ☐ Increase buy-in with your community
- ☐ Build or strengthen partnerships
- ☐ Support sustainability or funding efforts
- ☐ Document progress and achievements
- ☐ Other:

Describe why you are telling your data story (1 – 3 sentences) If someone remembers only one thing, what should it be?

Step 2. Audience

Part A. Map your Audience Ecosystem

Primary audience Who can make the decision?	
Secondary audience Who shapes or influences the decision?	
Beneficiary audience Who experiences the impact?	
Trusted messenger Who can carry the story credibly?	

Part B. Identify Your Priority Audience

Priority Audience • *Who most needs to hear the story of your work?* • *Who would benefit from better understanding your outcomes or impact?* • *Who could help your organization move the work forward?* • *Who could make, influence, or support a decision related to your work?*	
Why they matter • *Why is this audience important to your organization or this particular story?* • *What role could this audience play in advancing, supporting, or sustaining the work?* • *What could change if this audience understands your story?*	

Need: How important is it for this audience to hear the story now? • *What do they need to know or understand?* • *Is there a problem, gap, opportunity, or decision that makes this information relevant to them?* • *Why might this story matter to them right now?*	
Influence: How much ability does this audience have to help move the work forward? • *Can they make a decision related to your work?* • *Can they provide funding, resources, partnerships, referrals, advocacy, or other support?* • *Can they influence someone else who has decision-making power?*	
Readiness: How ready are they to hear and respond to the story? • *Do they already know something about the issue or your work?* • *Does the story connect to something they already value or prioritize?* • *Are there signs that they may be interested in learning more or taking action?* • *What might make them more or less ready to engage?*	

Access: How realistically can you reach this audience? • *Do you already have a relationship or connection with them?* • *Is there someone in your network who could make an introduction?* • *What opportunities or channels do you have for reaching them?* • *Can you reach the actual decision-maker, or only people around them?*	

Step 3. Identify Your Data

Data Sources

List the data sources you will potentially draw from in crafting your data story.

Data Element	Quantitative	Qualitative	Output, Outcome or Impact?	What key trends or outcomes might this data show?

What data do you still need?

Step 4. Assess Your Data

What findings or examples best illustrate your message? Limit to the most compelling highlights for your audience. As you complete the table keep in mind that you are looking identify key outcomes or impacts, promising practices, or challenges or lessons learned.

Theme	Data Source(s)	Related Outcomes or Themes	Notes and Examples

How well does your data support the story?

- Does each data point connect clearly to your goal?
- Do the data pieces work together to form a cohesive narrative?
- Examples from practice
- What additional data might strengthen the story?
- What evidence will you feature to support your highlights?
- Short data points or visuals
- Quotes or brief narratives

Step 5. Map Your Story Elements

Use the prompts below and the information from your tables to identify key components of your story.

Key Components	1-2 Sentence response	Notes
Who is the audience for this data story? What are their priorities?		
Goals: *What goals or priorities do your organization or program have?*		
Context*: What does the audience need to know to understand what you do and why?*		
	1-2 Sentence response	**Associated Data**
Challenges*: What major challenges does your work address? What challenges or gaps still remain?*		
Action*: What are the important outputs from your work to being change? How can you succinctly capture your outputs?*		
Impact*: What changed based on your actions? How does your data show that? Is there a narrower compelling narrative story you could include?*		

***Call to Action**: What do you want your listener to do now?*		

Five sentence elevator pitch
