

Data Leadership Competencies Self-Assessment Instructions

July 2026

Read these instructions completely before beginning your self-assessment.

The Self-Assessment tool allows users to complete the self-assessment multiple times. The instructions address how to enter data for the first and subsequent self-assessments.

Download the Self-Assessment file and save it to begin. Note: You must enter your name (cell G3) and date (cell G4) into the SA worksheets to see the complete contents of those worksheets.

Completing your first self-assessment

There are 14 worksheets in this workbook:

- Information – Provides basic information about the tool.
- Instructions – Contains information about how to use the workbook to enter data and view results.
- Codes – Reference worksheet for the option choices in SA1 to SA8
- SA1 (Self-Assessment 1) to SA8 – Use these worksheets to complete your self-assessment for the first, second, third time and so on.
- Data Summary - Provides a summary comparison of the results of each of your completed self-assessments and the competencies marked for improvement.
- Overview of Data Entered – Shows the data entered for each self-assessment.
- For Team Workbook – Ignore this worksheet. The information is used by the Team Profile Tool to compile information across team members.

Entering data

Select the **SA1** (Self-Assessment 1) worksheet to begin. This worksheet is divided into four main sections:

1. Header: Rows 1-5
2. Competency and Competency Ratings: Cells A6:G42
3. Learning Plan: Cells J6:N42
4. Assessment Summary: Cells C44:F62

You can only enter information in yellow cells. The locations (e.g., cell D7) of these cells are specified in each worksheet in cell A1.

The Header

- Enter your name. (Cell G3). This is a required field and how your name will be displayed in the Team Profile. Your first name and last initial are probably sufficient.
- Enter the date of the assessment (Cell G4)

Competency Ratings

Rate (column D)

- Reflect on your current level of knowledge or skill for each competency and enter your rating using this scale:

- Min comp = Not yet or minimally competent
- Comp = Competent with room to grow
- Hi Comp = Highly competent.
- The “Codes” worksheet (a dark burgundy tab) contains the rating scale for the competencies.
- Enter your rating by typing into the cell or using the dropdown feature contained within each cell to select your rating.

Essential (column E)

- Indicate whether the competency is essential to your current job responsibilities by using the dropdown feature or entering Y, N, or ? for “don’t know.”
- If you don’t know, check with your supervisor or team lead to see if the competencies essential to your role have already been determined.
- The Codes worksheet (a dark burgundy tab) contains the response choices for “Essential.”

Improve (column F)

- Indicate whether gaining knowledge or improving skill on the competency is a professional priority for you (Y or N).
- If you rated yourself as “highly competent,” the Improve cell for that competency does not require that you enter a value for “Improve and the cell will be gray, but you can still indicate Y if you want to further improve in that competency.
- The Codes worksheet (a dark burgundy tab) contains the response choices for “Improve.”

Notes (column G)

- Use the optional Notes column to capture anything you want to remember about your reasoning for your responses or any other thoughts related to the competency.

Review your entries for completeness. Each cell in D7:F42 (shown on worksheets with a light yellow background) should contain data except for any cells in the “Improve” column where the competency has a rating of “Highly competent.” As explained under Improve, you may opt to enter a Y in those cells.

Learning Plan (columns J to N)

- Any competency marked with a Y in Improve will automatically appear in your Learning Plan.
- **Priority for the next 3 months? (col I):** Select Yes or No from the dropdown list or type in the word. to indicate whether improving in this competency is a priority for you in the next 3 months.
- **How will you acquire this competency?:** Enter the steps you will take to build your skills in this competency.
- **By this date:** Indicate the date by when you will complete the identified steps toward improvement.
- The Learning Plan is based on your responses to Rate, Essential and Improve and will update if you change a rating that impacts the learning plan.
 - Note: If you complete the information for a competency in the Learning Plan and then subsequently change your Y to an N under Improve, that competency will be deleted but the information in the Learning Plan for that competency will still be there but aligned with the wrong competency. **We strongly recommend you do not complete the three columns in the Learning Plan until you have finalized your ratings.**
 - If your self-assessment will be entered into the Team Profile Tool, do not complete your Learning Plan until after the team discussion as some of your ratings may change based on that discussion.

Assessment Summary (row 44 through 62)

Your information is summarized for all competencies and by competency component (Foundational, Infrastructure, and Building a Culture of Data Use) in rows 44 to 62. Each of the summary sections contains totals for the rating options (Minimally competent, Competent, Highly competent) for all competencies and for only the competencies you marked as essential.

Saving Your Completed Self-Assessment

The Self-Assessment Tool is an Excel workbook and needs to be saved just like any other workbook. We recommend saving the file with your initials and the date your self-assessment was completed in the file name, e.g., DLC_Self-Asmnt_DM_11-19-26.

If your team will be using the Team Profile tool, be sure to add your initials to the file name so your self-assessment can be efficiently merged with self-assessments completed by others on your team.

Printing Your Completed Self-Assessment

Each worksheet in the workbook has an existing default print area set up. The print areas may be redefined or resized using the Print Area option in Excel's Page Layout if desired.

Completing Subsequent Self-Assessments

If you are using the self-assessment as an individual and not with a team, repeat the assessment every 6 to 12 months. Consider those competencies where you intended to grow to see if you have acquired new knowledge or skill. Reflect on any new skills you have acquired that you did not mark as growth areas. Identify and celebrate your successes, identify new priority growth areas, and keep learning.

- To complete your second self-assessment, click on worksheet SA 2 and repeat the process for the first self-assessment.
- The competencies marked as essential on your most recent previous self-assessment will be automatically marked as essential on your next self-assessment. You can change these values if they are no longer accurate.
- Save the file with a new date in the file name when you complete another round of assessment. (e.g., DLC Self-Asmnt_DM_5-8-26).
 - The new file will contain your results from all previous self-assessments and previous Learning Plans.
- Use worksheets SA3 and beyond for subsequent self-assessments.

Data Summary

This worksheet provides a summary comparison of the results of each of your self-assessments.

Summary of Ratings Entered Across All Self-Assessments (cols. A through I)

- Shows total number of ratings by Minimally competent, Competent, Highly Competent by type of competency and across all competencies
- The toggle in Cell A5 allows you to change the values included in the summary. "All" shows all data entered; "Essential Only" shows only competencies you rated as Essential = Y in each self-assessment.

Competencies Marked for Improvement (cols. K through R)

- Lists the numbers (and colors) of each of the competencies marked with a Y for improvement.

Overview of Data Entered

This worksheet shows the data entered for each self-assessment.

- Toggle “Yes” or “No” in cells C5, D5, and E5 to indicate which columns of data you would like to display.
- Selecting “No” for Essential and Improve will provide a concise comparison of how your mastery of the competencies has changed over time.

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About Us

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