Data Leadership Competency Team Profile Tool (Without Macros) Instructions

October 2026

Read these instructions completely before using the Team Profile Tool.

Before using the Team Profile Tool, the leader of the self-assessment process should identify all members of the state data team. A state data team consists of state staff and contractors who are responsible either directly or indirectly for the IDEA Part C or Part B 619 processes and systems for collecting, managing, analyzing, reporting, and using data. Include, as appropriate, members of your IT staff who provide ongoing support to the early intervention (EI) or early childhood special education (ECSE) team. Each team member needs to complete the Data Leadership Competency Self-Assessment and provide the saved file to the team leader for merging.

Overview of the Team Profile Tool

There are 17 worksheets in the Team Profile Tool in addition to the information worksheet and instruction worksheet:

- Control Panel
- Data
- Team Profile
- Add to Learning Plan
- Individual Responsibilities
- Team Members (TM_1 to TM_12)

The purpose of each worksheet is described below along with step-by-step instructions.

Like the Data Leadership Competencies Self-Assessment, the yellow-shaded cells throughout the worksheets of the Team Profile Tool allow for or require data entry. In Cell A1 on each worksheet, these data entry cells are explicitly named.

Download the Team Profile Tool and save it. Do not open it directly from the DaSy website.

Worksheets

Control Panel

This worksheet is a read-only summary table of the individual self-assessments in the TM_1 to TM_12 worksheets. The summary table contains columns for Date of Import, Data of Rating, Filename, and Team Member Name. There is one row of data for each team member entered. If a TM_* worksheet contains no data, the corresponding summary table cells will indicate, for example, “TM_7 is blank.” Otherwise, the information about each team member’s self-assessment file will appear in Columns B to E.

Data

This Data worksheet displays the self-assessment data that was copied for each team member listed in the Control Panel. No action is taken on this worksheet. It is view-only.

If team member data have been copied properly into the Team Profile Tool, the Data worksheet will display each team member's name, the date they completed their individual self-assessment, and their individual data.

Team Members (TM_1 to TM_12)

Each team member's current self-assessment information will be entered into a unique worksheet. A member's worksheet number will correspond to their team member number in the Control Panel. DO NOT RENAME THESE TABS. These worksheets are linked by their tab titles to the Data Sheet.

Entering data for each team member: Open the self-assessment file for Team Member 1. From within the file, click the bright blue **ForTeamWorkbook** tab. Carefully follow the instructions provided in Cell A1 of that worksheet.

- In the individual workbook, highlight Columns A:E from the **ForTeamsWorkbook** worksheet.
- In the team workbook, select the appropriate **TM_*** worksheet and right-click in Cell A1.
- From the popup menu, select **Paste Special** and select **Paste Values** and click OK. Do not select Paste All. If you Paste All, this workbook will stay linked to the self-assessment workbook, which may introduce errors or unexpected results later. **It is important to select Paste Values.**

You can check that each member's data has been copied correctly by making sure the name, assessment date, and other information for each team member appears correctly in the Control Panel and the Data worksheets.

Team Profile

The Team Profile worksheet provides an overall view of your team's strengths and gaps on each of the Data Leadership Competencies.

- **Essential for our team?** (Column C) allows the team to indicate if any competency is not essential for the team.
  - All competencies default to Yes because most will be essential to most teams.
  - Given the unique organizational context for any EI/ECSE team within a state, there may be a few Data Leadership Competencies that are not needed by anyone on the data team because that function is not performed by the organization or because someone within the organization performs the competency on behalf of the team as needed. Indicate a competency is not needed by using the dropdown in Column C to select No. Changing the cell to No will gray out the corresponding cells in Columns K to V because no team member will need to have this competency on their learning plan.
- **Count of Team Members With** (Columns D, E, and F) shows the number of team members who rated themselves as "Min comp," "Comp," or "Hi comp" on each competency. These are read-only cells that calculate automatically based on your data.
- **Names of Team Members With** (Columns G, H, and I) shows the names of the team members who gave themselves that rating. Column J shows the names of the team members who indicated they wanted to improve on this competency (which automatically puts the competency on their learning plan).

Use the dropdown in Cell C3 to show the data in Columns D through J for **All** the competencies or only for those competencies that have been rated as **Essential** by any team member.

- In the **All** view, the ratings for all competencies for all team members are displayed. The **Highly Competent** column (Column I) will be shaded red if no team members have rated themselves as highly competent for that competency.
- In the **Essential Only** view, only ratings for competencies that team members indicated as essential to their job responsibilities are shown. The **Names of Team Members With** columns for **Minimally competent** (Column G) and for **Competent with room to grow** (Column H) are shaded light orange if no one on the team considered the competency as essential to their job responsibilities. The **Names of Team Members With** column for **Highly competent** (Column I) is shaded dark orange if no team members rated themselves as highly competent for that competency.

How to Use This Information

Review each competency looking at who has marked the competency as essential (are these the appropriate team members?) and how they rated their skill level.

- **Team's strength**: If a competency has been marked as essential to the job responsibilities of the appropriate team members and those team members indicated they are highly competent in this competency, this is a strength of the team.

  Example of what this looks like in the Team Profile worksheet: With "Essential Only" selected in Cell C3, the Counts columns (Columns D:F) show 0 team members with Min comp for this competency, 0 team members with Comp, and 4 team members with Hi comp.

Count of Team Members With Min comp [formula]	Count of Team Members With Comp [formula]	Count of Team Members With Hi comp [formula]
0	*0*	*4*

- **Team's area(s) for improvement**: If no one indicated a competency as essential or the appropriate team members did not mark it as essential, this is an area for improvement. The team needs to identify those members for whom the competency should be considered essential and who therefore should master this competency.

  Example of what to look for in the worksheet to see how many rated the competency as essential: With "Essential Only" selected in Cell C3, any row in which Columns D to F—the three Counts columns—are 0 is a competency that no team member has indicated as essential. In this example, the team will need to decide for which members this competency is essential.

Is this competency esential for our team? [Data entry]	Count of Team Members With Min comp [formula]	Count of Team Members With Comp [formula]	Count of Team Members With Hi comp [formula]
Yes	*0*	*0*	*0*

  Example of how to know who rated the competency as essential and what rating they gave themselves: Look at Columns G to I to see which team members marked the competency as essential and what rating they gave themselves. In this example, two team members indicated the competency as essential, but only one is already highly competent. The Data Manager, for whom the competency is essential, has room to grow but did not indicate this competency as an area for improvement, although they should have because it is essential to their job.

Names of Team Members With Min comp: Not yet or minimally competent [formula]	Names of Team Members With Comp: Competent with room to grow [formula]	Names of Team Members With hi comp: Highly competent [formula]	Names of Team Members With: Competency Already on Learning Plan [formula]
-	*Data Manager*	*Program Coord*	-

The team needs to decide if these team members are the appropriate people for whom this competency is essential. Columns K to V should be marked with an "X" to indicate any team member who will need to update their individual self-assessment and learning plan after the team discussion because either (1) they did not mark the competency as essential but the team discussion determined it was essential for their job or (2) they marked the competency as essential but are not yet highly competent and they did not mark it as an area in which they wanted to improve.

- Many of the Foundational Data Skills (FD) and Data Culture (DC) are basic to effective functioning with data and should be considered as essential to multiple or, for some competencies, all team members.

The goal is to have a Team Profile in which every team member is highly competent in every competency that is essential to their job. Until that goal is achieved, individual learning plans should be created to support each team member in becoming highly competent in the competencies essential to their job.

- **Add to Learning Plan**: Use Columns K to V to indicate any team member who needs to add a competency to their learning plan.
- A **Notes** space (Column W) is provided to record any notes helpful to the team for documentation, such as why the team does not need this competency or why these two team members need to master this competency.
- **Names of Team Members Needing to Add Competency to Learning Plan** (Column X) provides the names of team members who will need to make learning plan revisions after the team discussion.

Add to Learning Plan

This read-only worksheet displays the name of each team member and the list of competencies that have been identified as needing to be added to the team member's learning plan (i.e., team member needs to change **Improve** to Y).

Individual Responsibilities

This worksheet shows the competencies by team member that were marked as needing to be added to the team member's learning plan on the Team Profile worksheet along with the team member's original values for the **Rating**, **Essential**, and **Improve**. Select the name of the team member by using the dropdown in Cell B4.

If there is an N in the **Essential** column (Column D), it means the team member on their individual self-assessment did not consider the competency as essential to their job responsibilities. The team discussion, however, resulted in the competency being determined to be essential for this team member because the team concluded the team member needs to improve on that competency and add it to their learning plan.

Saving the Team Profile Tool

The Team Profile Tool is an Excel workbook and needs to be saved just like any other workbook. We recommend saving the file with the date it was completed in the file name (e.g., DLC_Team_Profile_12-10-26).

****Save the file often while you are working in it.****

Printing the Team Profile Tool

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

Individual Actions After Completion of the Team Profile

Once the Team Profile is completed, individual team members should revisit their most recent self-assessment results and make any adjustments based on the Team Profile discussion as shown on the "Individual Responsibilities" worksheet. Team members whose values on any of the categories (**Rating**, **Essential**, **Improve**) changed during the Team Profile discussion should update their recent individual self-assessment with these new values. Likely adjustments include:

- Changing one or more additional competencies to Y under **Essential**.
- Indicating one or more additional competencies as Y under **Improve**. This will automatically add that competency to the person's learning plan.

After finalizing the self-assessment for this time frame, the individual should complete Columns L to N in the learning plan and proceed to implement it.

Updating the Team Profile after Individual Revisions

If the Team Profile discussion resulted in multiple changes to individual self-assessments, the team lead should consider creating an updated Team Profile. To do this, make a copy of the previous Team Profile and give it a new name with today's date. For those individuals who have updated their self-assessment results, the team lead can copy and paste their new results over their previous results in the appropriate TM worksheet. This will retain your notes from the previous discussion.

Completing a Second and Subsequent Team Profiles

We recommend updating the Team Profile regularly, such as every 6 to 12 months, to capture new competencies acquired by team members. Teams may opt to redo their Team Profile on a shorter timeline if a team member leaves or a new team member joins in the interim.

If a team member has multiple self-assessments on their individual tool, be sure to use the most recent self-assessment for copying and pasting into the new Team Profile.

Staffing Changes

- A team member has left the team.
  - Make a copy of the current Team Profile and save it with a new date.
  - Open the new file.
  - In the corresponding worksheet for that individual's self-assessment results—for example, TM-3—delete their data in Cells B3, C2:C3, C5:E40, and A41. Highlight those cells, right-click

and select “Clear Contents.” This will keep the table gridlines and shading but remove the cell entries.
  - On the Team Profile worksheet, delete any Xs for that team member in Columns K:V.
- A new team member has joined the team.
  - Make a copy of the Team Profile and save it with a new date.
  - Open the new file.
  - Copy and paste in the individual’s self-assessment results in the corresponding TM worksheet following the same procedure used with the other team members.

If team members have left the team, the Team Profile will need to be reviewed to identify any competencies that are essential but no longer assigned to any team members or other gaps in responsibilities. Decisions will then need to be made about which competencies to assign to existing or new team members.

Using the Team Profile Tool to Reexamine Your Team’s Data Leadership Competencies over Time

In preparation for the 6-month or annual review of the Team Profile, each team member should redo their individual self-assessment. To create a new Team Profile, open a blank Team Profile and copy each team member’s self-assessment results into one of the TM worksheets following the procedures described above in the “Team Members (TM_1 to TM_12)” section.

Because this is a new file, team will again indicate any competencies not needed by the team on the Team Profile. This can be done easily by reentering the information from the previous file if the competencies needed and not needed by the team have not changed.

DaSy Center staff are available to help with the self-assessment or the Team Profile Tool. For technical assistance, please contact DaSy.

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About Us

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To learn more about the DaSy Center, visit the DaSy Center website at https://www.dasycenter.org/.