Program Data Coordinator 30-60-90-day plan

Steph Turner, prospect **Program and Data Coordinator**, ready to start on day one.

First 30 days: LEARN systems, standards, and relationships

Focus on understanding programs, grants, data flows, and expectations while building trust with directors, managers, and branches.

1. Clarify expectations with my supervisor: top 3–5 priorities for my first 3–6 months, key grants I'll support, main reports I'll own, and how success will be measured.

2. Map all active programs and branches: what service each offers, who they serve, schedules, which have grant funding tied to them, and when is such grant reporting due.

3. Learn the CRM and related tools: what software we use, how registration is created, what fields are required, how data is entered and updated, and how people currently pull reports.

4. Review all active grants: summarize goals, activities, deliverables, timelines, and reporting requirements in a simple tracking sheet I keep updated, and make available to stakeholders.

5. Observe existing workflows: sit in on program planning meetings, watch how registration and data collection are handled, and note pain points (missing data, late submissions, unclear forms).

6. Begin supporting basic coordination tasks: help with supply lists, equipment tracking, and checklists for public outreach events (BMHW?) so I understand operational needs in practice.

7. Start building relationships as a supportive partner: cultivate rapport with each branch lead, Programming, Marketing, and development/grants staff, emphasizing that my role is to make their work easier and more aligned with funder expectations and organizational values.

8. Ensure each served person feels they are receiving personalized attention, that all pulled data respects their personal needs more than simply serving the reporting process.

Takeaway

By day 30, I should have a clear picture of the program portfolio, the main grants, the CRM structure, and who I must rely upon at each branch for timely, accurate information.

Days 31–60: OWN core coordination and data workflows

Begin taking full responsibility for recurring tasks, stabilizing data quality, and strengthening communication between Programming, branches, and Marketing.

9. Take primary ownership of program registration setup in the CRM: ensure all branches submit complete information (schedules, descriptions, fees, required details) using a consistent intake template.

10. Formalize a simple, equity-focused data checklist for branches: what must be submitted, by when, and why it matters (e.g., complete registration details, attendance, incident reports, receipts). Set deadline for grant reporting input at least two days prior to submission deadline.

11. Lead the quarterly data collection process: meet with each branch to review outcomes, gather required data, and draft clear, concise report-outs for leadership and quarterly reporting.

12. Start monitoring data trends: build simple views or reports in the CRM (or spreadsheets) that track participation, attendance, and key grant-related metrics, and share insights with directors to support decision-making.

13. Serve as an active liaison with Marketing: create a lightweight process where I provide timely, accurate information (program details, schedules, registration links, testimonials) for promotions and outreach, and confirm that promotions match actual offerings.

14. Begin organizing qualitative impact data: design a simple process to gather participant testimonials and feedback (e.g., brief survey, short prompt after programs) and store them in an organized way for use in grants, reports, and marketing.

15. Clean up and standardize documentation practices: work with branches to ensure incident reports, receipts, and data files are stored consistently (locations, naming conventions, required fields).

Takeaway

By day 60, I should be recognized as the point person for accurate program information, registration setup, quarterly data compilation, and coordination between Programming and Marketing.

Days 61–90: OPTIMIZE systems and strengthen grant alignment

Shift into improving systems, supporting evaluation and storytelling, and ensuring programs and data are tightly aligned with grant expectations and organizational values.

16. Conduct a mini "data and grant alignment" review: for each major grant, verify that programs, registration forms, and data fields actually capture what funders expect (goals, deliverables, participant characteristics, outputs, and outcomes).

17. Propose 3–5 concrete improvements to workflows: for example, a standardized program information template for branches, clearer CRM fields linked to grant metrics, or a shared calendar for grant reporting deadlines and program milestones.

18. Develop or refine standard reporting templates: internal planning summaries for directors, leadership quarterly report-outs, and external grant report data tables that can be reused and adapted. Integrate into Power BI or Excel pivot tables.

19. Build a small but robust impact "library": a curated set of data summaries, testimonials, and brief narrative descriptions organized by program/branch that development and Marketing can draw on for grants, reports, and outreach. Use as a dimension table in Power BI.

20. Strengthen compliance monitoring: maintain an updated grant tracker that flags upcoming reporting dates, required documentation, and any data gaps, and communicate proactively with branches and directors to close those gaps.

21. Collaborate with directors to interpret data through an equity and community-informed lens: review trends together, discuss what the numbers do and do not say, and identify questions for further inquiry rather than relying on numbers alone.

22. Document key processes: create concise SOPs or one-pagers for registration creation, quarterly data collection, testimonial gathering, and grant reporting support, so others can follow consistent practices. Invite feedback for continuous improvements.

Takeaway

By day 90, I should be helping Rootead not only "have the data" but use it responsibly and in alignment with its values—strengthening program integrity, grant compliance, and impact storytelling. These are dynamic, open to updating with fresh information.