



Self-Assessment Worksheet: Advancing Data Visualization at Your Agency

Purpose:

This self-assessment is designed to help agencies reflect on their current practices in data visualization across six key areas of competency. It is a first step in identifying areas of strength, recognizing opportunities for growth, and using the Visualization Adoption Roadmap to plan targeted improvements.

You can complete this worksheet on your own, but working through it as a team often leads to richer insights and a more complete assessment.

Instructions:

- Rate each statement from 1 to 5 based on how true it is for your agency, where:
 - **1 — Not Yet**
This is not in place or rarely happens.
 - **2 — Beginning**
Some early steps are happening, but inconsistently.
 - **3 — Sometimes**
This occurs regularly but is not fully established.
 - **4 — Mostly True**
This is well established, though occasional gaps remain.
 - **5 — Consistently True**
This is fully implemented and consistently practiced.
- Total your scores per competency and review the scoring guidance at the end to determine your agency's overall profile.
- Then, use the Visualization Adoption Roadmap sections of this report to explore how to advance to the next level.

Tools & Technology

Statement	Rating (1–5)
I have access / our staff have access to basic data visualization tools (e.g., Excel, PowerPoint).	
Relevant staff use specialized software (e.g., Power BI, Tableau, ArcGIS, Adobe Creative Products, Blender, etc.) for creating interactive visuals or dashboards.	
There are licenses and platforms across the agency for people who want to develop data visualization.	
Visualization tools are integrated with our existing data systems.	

Subtotal: _____ (Max 12)

Skills & Staffing

Statement	Rating (1–5)
We have a go-to person or team recognized as internal expert(s) for data visualization.	
Staff across various roles, such as planning, data, and communications, receive visualization training or support.	
Data visualization is often included in job descriptions or performance expectations.	
Staff collaborate across teams to improve visuals.	

Subtotal: _____

Leadership & Governance

Statement	Rating (1–5)
Leaders in our agency request visuals to inform their decisions.	
At least one senior leader champions improved communication through visuals and speaks publicly about its value.	
We have internal guidelines or standards for what good visualization looks like.	
Visualizations are built into key deliverables (e.g., performance plans, LRTPs, budget presentations).	

Subtotal: _____

Communication Strategy

Statement	Rating (1–5)
Staff tailor visualizations for specific audiences (e.g., simplifying for public use, highlighting key takeaways for executives, or preserving technical detail for engineers).	
Staff include narrative elements or callouts (e.g., key findings, headlines, or recommended actions) to help audiences interpret the visual.	
Designated staff and/or other resources are available to align messaging with leadership objectives for public and agency-wide visualizations.	
Templates and/or guidelines are available for staff to follow agency branding and logo use in their visuals.	

Subtotal: _____

Data Infrastructure & Governance

Statement	Rating (1–5)
Our data is stored in a way that supports connections and updates to visualization software.	
We have consistent field definitions, metadata, and formatting standards.	
Data updates and maintenance are automated.	
Staff know where to access approved data for visualization.	

Subtotal: _____

Evaluation & Feedback

Statement	Rating (1–5)
Staff review visualizations to assess whether they achieved their intended purpose (e.g., clarity, engagement, decision impact)	
Stakeholders and end users are asked to provide feedback on visualizations, either informally or through structured input.	
Staff have improved or adapted visual formats or tools based on lessons learned from past projects or feedback.	
Metrics are used to evaluate visualization effectiveness, such as click rates, comprehension scores, or stakeholder satisfaction.	

Subtotal: _____

Total Score Summary

Competency	Score
Tools & Technology	
Skills & Staffing	
Leadership & Governance	
Communication Strategy	
Data Infrastructure & Governance	
Evaluation & Feedback	

Scoring Guidance

Look closely at your scores within each of the six competency areas.

Score Range (per section)	Visualization Maturity Level	Suggested Next Step
4-10	Emerging	Begin building foundational capacity. Use the Visualization Adoption Roadmap to identify 1–2 “quick win” areas to strengthen. Focus on tools access, skills development, and small pilot efforts.
11-15	Developing	You have established practices and are ready to formalize and scale. Prioritize governance, cross-team collaboration, and performance evaluation. Use the Visualization Adoption Roadmap to move toward institutionalization.
16-20	Mature	You are a strong candidate for peer exchange, piloting advanced methods, or mentoring others. Focus on innovation, sustainability, and alignment with strategic goals. Consider contributing a case study to this guide.

Start by identifying your lowest-scoring areas, these are likely your biggest opportunities for improvement. Then, go directly to the corresponding section of the Visualization Adoption Roadmap to explore strategies and ideas tailored to that topic. Use the Visualization Adoption Roadmap to pinpoint practical first steps, explore ways to build sustainable practices, and see peer examples and case studies relevant to your agency context.

Reflections Before Reviewing the Visualization Adoption Roadmap

You can use the space below to guide internal discussion or personal reflection before you dive into the Visualization Adoption Roadmap:

- Which of these areas, if improved, would have the biggest impact on your agency's ability to communicate with visuals?
- What is one concrete step you could take this quarter to begin improving in that area?
- Who could you involve or learn from to build momentum in this area.