



► Developing a data management strategy

January 2025

This reference guide provides employers' and business membership organizations (EBMOs) with tips for developing a data management strategy for their organization. It supplements the ***Guidance for Employers' and Business Membership Organizations to Position and Use Data as a Strategic Asset*** handbook.

► What is a data management strategy?

A data management strategy is a plan on how to improve how an EBMO collects, analyses, stores, shares, retains and retires data. It provides the necessary structure to use and share data efficiently to support decision-making at the strategic, organizational and operational levels. A data management strategy also articulates the methods, practices and processes to manage and share data in a repeatable manner.

► How to develop a data management strategy?

A data management strategy must align with an EBMO's long-term strategic direction and objectives. The first step to developing a strategy is to make an **EBMO strategy statement**, by answering the following questions.

- **Objectives:** What objectives will drive our EBMO over the next five years?
- **Scope:** What will our EBMO do and not do? What are our operational boundaries?
- **Advantage:** Why do members join our EBMO?

It is then important to rely on the EBMO's objectives, scope and advantage of the strategy statement to develop the data management strategy. An EBMO should establish the scope and purpose of the data management strategy first, before establishing the other processes for managing data across its full cycle.

The data management strategy should be a formal process that is digitally available and provides detailed answers to the following questions.

1. Scope and purpose

What data will our EBMO intentionally manage to support our objectives? How can we measure the success of the data management strategy?

2. Data collection

What data are needed now and will be needed in the future? How frequently do we need to update our data? Have members and other sources of data consented to have their information gathered?

3. Data analysis

What can we do to promote data analysis and collaboration across departments, units or divisions? How will we share data analysis internally and externally? How will we develop and manage analytical results?

4. Data storage and security

Where should data be stored? What data should be protected or secured and how? Who will be responsible for securing the data across our departments, units or divisions? What guidelines or procedures are needed to ensure data security?

5. Data access, sharing and dissemination

What actions can be taken to integrate the data silos? What data should be shared across departments, units or divisions and how frequently?

6. Data retention, retirement or destruction

What data should be kept and for how long? What guidelines are needed to maintain and archive historical data? Do such guidelines align with perceived risks?

► How do we ensure that the data management strategy is implemented across departments, units or divisions?

It is important to involve all of the EBMO's leadership and staff in the development of the data management strategy: The CEO and board members can contribute their experiences and familiarity with strategic objectives and organizational goals. Department managers can provide insights specific to their department, unit or division and staff. Staff can contribute their practical knowledge and understanding of operational realities of how data are used.

The data management strategy should be shared with staff across all departments (units or divisions) and levels. It should be written in simple language that is understandable across functions to ensure that staff understand its main objectives and the changes that might impact how they manage data in their role.

► What can be done to maintain the data management strategy?

A data management strategy is a living document that must be adjusted based on changing data uses and needs. The following recommendations can help in managing a living document.

- Review and update on a regular basis, at least annually.
- Number and date each version of the document as it evolves.
- Maintain all versions in a digital folder so that the history of the changes is accessible to relevant staff.
- Staff across different functions should be encouraged to propose changes to the data management strategy. The final changes should be approved by the data steward, who is a designated staff person responsible for implementing data use and security practices at the EBMO. The data steward should also be responsible for maintaining all data governing documents and procedures.

► Next steps

This reference guide includes a form that EBMOs can use to develop their data management strategy. It can be used as is or modified based on an EBMO's needs or preferences.

Additional information to implement a data management strategy, including guidance on data collection, storage and security, as well as access and sharing is available in Section 6 of the ***Guidance for Employers' and Business Membership Organizations to Position and Use Data as a Strategic Asset*** handbook.

Data management strategy

This data management statement outlines recommended practices to collect, analyse, store, share, retain and retire data at [insert name of EBMO].

Date of creation: DD/MM/YY

Date of revision: DD/MM/YY

Version: [insert number]

Scope and purpose

[Insert what data your EBMO will intentionally manage to support its objectives.]

[Insert specific ways in which you could measure the success of your data management strategy.]

Data collection

[Insert what data are needed and will be needed, how data are or will be collected, how frequently data should be updated and how to obtain consent from members and other data sources to have their data collected.]

Data analysis

[Insert ways in which you can promote data analysis and collaboration across departments [or units or divisions], the recommended ways to share data internally and externally and the recommended practices to manage analytical results.]

Data storage and security

[Insert where data should be stored, which data should be secured and how, whom among the staff will be responsible for data security, guidelines or procedures to ensure data security, steps to follow in case of data breaches.]

Data access, sharing and dissemination

[Insert recommended practices to integrate data silos and what data should be shared across departments [or units or divisions] and how frequently.]

Data retention, retirement or destruction

[Insert what data should be retained and for how long and the recommended practices to maintain and archive historical data, with a view to minimize the data management risks.]

Developed by: [insert name] on [DD/MM/YY]

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