Community Impact

Case Data Audit Tool

This tool is designed to help organisations systematically review their existing case data, assess its operational usefulness, and identify gaps in data collection for impact evaluation. It guides you through four steps: **identifying** your current data sources, **categorising** the types of data you collect, **assessing** whether that data shows client change or only service activity, and carrying out a **gaps analysis** to highlight areas where new or better data is needed. Used properly, it provides a clear foundation for strengthening your evaluation practice and ensuring that the information you collect is meaningful, usable, and directly linked to your intended outcomes

1. Identify Sources of Existing Data

This section is where you set out the different places your organisation currently records case data. You are not only identifying where information is held, such as in forms, spreadsheets or systems, but also considering how it is structured. Make a note of whether the data is consistently organised through set fields, or whether it relies mainly on free text, as this will affect how usable it is for evaluation. It is also important to record who is responsible for maintaining each data source and how frequently it is updated, as both of these factors will influence the quality and reliability of the information you are working with.

Data Source	Description	Format (structured, free text)	Frequency of Update	Responsible Staff

This toolkit should be cited as: Community Impact CIC (2025). Advice and Advocacy Evaluation Toolkit: Practical Guide and Tools for Impact Measurement. London: Community Impact CIC.

2. *Categorise the Data You Collect*

This section is where you review the data you collect and group it into broad categories. The aim is to distinguish between different types of information, such as demographic data, delivery data, and evidence of impact, and to make a brief assessment of how consistent and reliable each category currently is. This step will help you understand whether the data you hold is already fit for purpose or whether improvements are needed before it can be used meaningfully in evaluation.

Data Class	What we collect	Notes on quality/Consistency
Demographic Data		
Case Need/Issue		
Delivery Data		
Impact Data		

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Satisfaction Data		

3. Assess What the Data Shows

This section is where you take a closer look at what each category of data is actually telling you. The focus here is on assessing whether the data you collect shows evidence of client change, or whether it mainly records service activity or client characteristics. This distinction is important because only data that captures change can be used to evidence outcomes. Where data does not show change, it can still be useful, but its role needs to be clearly understood.

Data Class	**Shows Client Change (Impact)? (Yes/No)**	**If No, What Does It Show?**
Demographic Data		
Case Need/Issue		
Delivery Data		
Impact Data		

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Satisfaction Data		

4. Identify Gaps

This section is where you review what the previous steps have shown and identify any gaps in your data collection. The aim is to be clear about where you do not yet have the information you need to demonstrate client change, and to assess the quality of what you do collect. By doing this, you can prioritise improvements that will make your evaluation more meaningful and ensure that your data collection efforts are focused on the areas that matter most.

Area	Is data available?	Quality Assessment	Priority for improvement
Beneficiary change (Impact)			
Case Categorisation			
Satisfaction			
Delivery Metrics			

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