How to...

...conduct a data audit: A Step-by-Step Guide

What is a data Audit?

A data audit is a systematic review of the information that advice and advocacy providers collect during their work. It means mapping the different types of client and case data held across forms, CRMs, emails, and spreadsheets. It is not concerned with how much data exists, but with whether that data is structured, consistent, and meaningful for evaluation purposes.

A good data audit highlights whether the information a provider holds can actually demonstrate client outcomes — or whether it only describes activity, contacts, or internal processes. It is a practical exercise aimed at understanding what is available, how usable it is, and where the gaps are.

Why is a Data Audit Important?

Youth service providers rarely lack data. In practice, many hold extensive volumes of client and service information, but often face challenges in the quality, structure, and operational usefulness of that data. The issue is not the quantity collected but whether that data can meaningfully support evaluation and service improvement. Most providers have detailed client records, demographic profiles, categories of need, and extensive case notes — but these are often inconsistently recorded, buried in open-text fields, or scattered across informal spreadsheets and emails, making systematic analysis difficult and often unused.

Many CRM systems are filled with unstructured narrative case notes, lists of client contacts, or ad hoc updates, rather than structured outcome data. In many providers, this information is collected "*because we have to,*" rather than because it is strategically used to understand client change or service impact.

Case data that is buried in free text fields, sporadic emails, or spreadsheets that are rarely reviewed cannot meaningfully inform evaluation, service development, or strategic decision-making.

The purpose of a data audit

A data audit is a practical exercise designed to map what data is currently collected, how it is structured, and what purpose it serves. It is not about quantity, but about quality and relevance. The audit is also an opportunity to assess whether existing data supports wider strategic objectives, including service improvement, organisational learning, and business development.

How to do a data audit in practice

The Data Audit Form in this toolkit has four sections. Each section is designed to walk you through a different aspect of reviewing your existing data.

Section 1: Identify Sources of Existing Data

The purpose of this section is to map where your client and service data is currently held. Many advice and advocacy providers, even if they have a CRM system, store data across multiple locations. This can make it difficult to locate and use information efficiently and often leads to duplication. Data collection is resource-intensive, particularly in terms of staff time, so this process also helps rationalise data collection across your service.

The form asks you to list where your client and service data is currently stored: CRM systems, spreadsheets, paper files, emails, or other places. You are asked to note the structure (whether the data is structured fields or free text), how often it is updated, and who is responsible for maintaining it.

This step helps you build a clear map of where your data sits, how organised it is, and who manages it.

Example: *In practice, many advice and advocacy providers rely heavily on case notes entered into CRMs or saved as Word documents on shared drives. This can lead to client information being buried in long free-text case notes, with important outcomes (e.g., "client avoided eviction") hidden within lengthy narratives. Because this data is unstructured, it is difficult to access systematically. A structured audit will help you surface these examples, highlight where important information is being lost in narrative fields, and set a plan for more systematic recording going forward.*

Section 2: Categorise Data by Type

The purpose of this section is to help you understand the kinds of information you are already collecting and whether that data is useful for evaluation. One of the challenges of evaluation is ensuring that you have the right types of data for the claims you want to make. A common mistake is to misrepresent data — not deliberately, but because services lack clarity about what type of data supports which outcome.

Youth service providers are especially at risk because they generate a wide range of data — from client intake forms and referral records to detailed case notes and feedback surveys. This section brings structure to that variety.

The form asks you to sort your existing data into five broad categories:

- Demographic Data
- Case Need/Issue Data
- Delivery Data
- Impact Data
- Satisfaction Data

For each type, you are asked to comment on the quality and consistency of what you collect — including whether the data is complete, regularly collected, and recorded in a way that allows systematic extraction.

This step gives you a clearer picture of the balance across your data. For example, many services collect a lot of delivery data (e.g., sessions held, forms completed) and satisfaction data (e.g., "helpful service" ratings), but have limited or no structured data showing client change. It is common for services to present satisfaction or delivery data as if it evidences impact, often without realising the difference. Impact data is distinct: it specifically shows a change for the client resulting from your service — such as improved financial security, increased confidence, or successfully accessing rights.

Example: *In many services, demographic and presenting issue data is collected well at intake, but outcome and impact data is missing or inconsistently recorded. In others, long-form case notes sometimes contain evidence of change (e.g., "client successfully appealed benefits decision"), but because this is hidden in free text and not categorised under outcomes, it cannot be easily reported. By categorising your data, you can expose these gaps, clarify where outcome data is weak or absent, and prioritise improvements that make your evaluation meaningful and defensible.*

Section 3: Assess Whether Data Shows Client Change

The purpose of this section is to encourage you to critically assess the role each type of data plays in your evaluation. It is not enough to collect data; you must understand what each data point actually tells you.

The form asks you to review each data type and consider carefully: does this information show client change (impact), or does it merely record an activity, contact, or background characteristic? You are encouraged to think beyond what is collected and focus on how it is used.

Ask yourself:

- *Does this data show that something changed for the client as a result of our work?*
- *Are we mistaking a completed action (e.g., "referral made") for a real outcome (e.g., "client accessed needed service")?*
- *Are we presenting satisfaction scores as if they show changes in wellbeing, stability, or empowerment, when in fact they do not?*

This stage is critical because it helps you separate evidence of delivery and experience from evidence of actual impact. Only data that shows a shift in a client's situation, wellbeing, rights, or independence can be counted as outcomes evidence.

Example: *If a case record shows that a client attended three advice sessions, but there is no record of whether their presenting issue (e.g., benefits dispute, housing threat) was resolved or improved, you have delivery data but not impact data. If, however, the record states "client secured PIP award after appeal," this is clear evidence of client change.*

Completing this section helps ensure that your evaluation focuses on the right evidence, avoids over-claiming, and produces findings that are robust, credible, and genuinely focused on client outcomes.

The form then asks you to assess whether each type of data shows client change (impact) or simply records activities or client characteristics.

This step helps you separate data that demonstrates outcomes from data that only describes processes or contact.

Section 4: Conduct a Gap Analysis

The purpose of this section is to bring together everything you have learned so far and turn it into practical insight. Completing a gap analysis means stepping back to ask: what is missing from our data collection that we would need in order to properly evidence client outcomes?

The form guides you to identify where evidence of client change is missing, incomplete, inconsistent, or of poor quality. You are asked to review each category of data critically and note gaps that could affect the credibility or completeness of your evaluation.

Ask yourself:

- *Do we have structured evidence of change for the main issues we support clients with?*
- *Are key outcomes (such as improved financial security, increased independence, better health) properly evidenced, or only partially recorded?*
- *Are there areas where we collect delivery and satisfaction data, but no outcome data?*

This step is critical because it defines where you should focus your improvement efforts. Strengthening data collection in the right places will significantly enhance your ability to evidence impact, respond to funders, and guide service development.

Example: *After working through the audit, a service may realise that while it records the number of clients attending advice sessions and collects general satisfaction feedback, it has no systematic way of showing whether clients' presenting problems were resolved. Without this, the service cannot credibly evidence its core impact. Identifying this gap allows the service to introduce simple outcome recording at the point of case closure, strengthening future evaluation.*

Completing a gap analysis ensures that your evaluation strategy is based on real insight, not assumptions, and that future data collection is focused, efficient, and fit for purpose. Finally, the form guides you to identify gaps in your current data collection — where important evidence of client change is missing, incomplete, or inconsistent.

You are asked to assess the quality of your data and prioritise areas for improvement. This step helps you focus future efforts where they will have the greatest impact on your evaluation capacity.

Once you have completed the form, you should produce a short summary of your key findings. This will give you a clear starting point for strengthening your data collection, improving your evaluation approach, and ensuring your evidence base is meaningful and usable.

Key things to consider:

- *High volumes of data are not a substitute for good data. Quality, relevance, and structure matter more.*
- *Client satisfaction data, while important, is not a measure of impact.*
- *Demographic and case need data are necessary for context but do not evidence change.*
- *Evaluation-ready data must be capable of being analysed systematically — either through structured fields or consistently recorded outcomes.*