Worksheet: Review your existing data

Many charities, social enterprises and voluntary groups have to make tough decisions about their activities and resources. We’re all looking for useful ‘data’ (basically meaning information) to help us make those decisions and communicate our decisions.

Perhaps you and your colleagues have questions like these...

* “What data have we already got about the people we work with and our activities?”
* “What data would help us to make decisions now?”
* “What data are we missing that might help us to make better decisions?”

This worksheet should help you to answer these questions, so that ultimately you can **better collect and use data to shape your organisation's services or influence change.**

## How to use the worksheet:

* The worksheet is split into three sections. Part 1 explores what existing data you have, Part 2 explores how and why you use it, and Part 3 explores what this means for your planning now. Work through each section in order.
* The worksheet can be completed independently or with input from colleagues. It should take 30-60 minutes to complete, depending on the amount of information you have and your familiarity with the information.
* We’ve tried to make this useful for a range of situations, but it’s up to you to consider what’s helpful for your context. We suggest focusing on one target group, project, or service to start with, then you can consider other projects/services with similar groups.

|  |  |
| --- | --- |
| **Name of project / organisation** |  |
| **Key groups of people that your project/ organisation targets** |  |

## Part 1: What routine data have you already got?

Use the five types of data framework to think about the routine data you already collect and hold. The first three types (user, engagement and feedback) represent data that should be collected routinely.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Type of data**  *(Find out more about the 5 types of data* [*here*](https://www.thinknpc.org/resource-hub/the-cycle-of-good-impact-practice-the-five-types-of-data)*)* | **Do you have any of this type of data?**  *Y / N* | **What data do you collect? Who do you collect it from?**  *Do you collect data from service users, their family or carers? Do you collect any data from referral agencies?* | **How is the data collected?**  *Who collects the data? How, when and how often? Do you use paper forms, an online survey, chats?* | **Where is this data held?**  *Is this in a database, spreadsheet or paper? Is it held on local computer files, shared files or online? Who is it available to? Do you still have access to it?* | **How is this data used currently?**  *Who analyses the data and who uses the results of the analysis? Is it used internally or externally?* |
| **User data**  *Characteristics of the people you’re reaching.* |  | E.g. Names, date of birth, postcode, why people signed up. | E.g. Sign up forms (online). | E.g. Some in database, some in sign-up forms saved online. Everyone can access. | E.g. We sometimes look at why people signed up. Not really using other data. |
| **Engagement data**  *How individuals interact with your service, and to what extent. Includes face-to- face and online engagement.* |  | E.g. Attendance record, enquiries, social media engagement, website views. | E.g. Attendance log weekly (online), emails and phone calls with project team, website & Facebook analytics. | E.g. Spreadsheet saved online. Everyone can access. | E.g. We check attendance log weekly to send reminder emails to people who haven’t turned up. |
| **Feedback data**  *What people think about the service.* |  | E.g. What people like & don’t like. | E.g. Online survey and phone conversations. | E.g. Back-end of Survey Monkey account, everyone can access. | E.g. We read feedback forms to get quotes, report to funders and to change activities for next time. |

## What outcomes & impact data have you already got?

The final two types of data in the five types of data framework are outcomes and impact data. **Note:** Not everyone will have these types of data. Impact data is the hardest data to collect and so many services do not need to collect this. You can consider data you have collected, or other sources of data about outcomes and impact that you might be able to access. This includes outcomes and impact on individuals, groups and the wider community.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Type of data** | **Do you have any of this type of data?**  *Y / N* | **What data do you collect? Who do you collect it from?**  *Do you collect data from service users, their family or carers? Do you collect any data from referral agencies?* | **How is the data collected?**  *Who collects the data? How, when and how often? Do you use paper forms, an online survey, feedback via text or in person?* | **Where is this data held?**  *Is this in a database, spreadsheet or paper? Is it held on local computer files, shared files or online? Who is it available to? Do you still have access to it?* | **How is this data used currently?**  *Who analyses the data and who uses the results of the analysis? Is it used internally or externally?* |
| **Outcomes data**  *Short-term changes, benefits or assets people have got from the service.* |  | E.g. Before & after measures about wellbeing. | E.g. before & after online survey of a sample of people. 6 months apart. | E.g. Back end of survey monkey, then analysed in a spreadsheet saved online | E.g. reporting to funders |
| **Impact data**  *Long-term difference that resulted from the service.*  *Have outcomes (above) helped people to change their lives for the better?* |  |  |  |  |  |

## Part 2: How can we use this data?

Once you have mapped out the data you currently collect in Part 1, it’s time to consider how useful that data really is to you. This will help you to decide what information to review when making decisions about your services. It’s worth starting with what’s useful to you **right now**, and then considering what might be useful to you in the future.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Type of data** | **Why is this data useful?**  *What does this information tell you? Who do you collect it for? Can you pinpoint the data that is useful to you?* | **Do you really need this data?**  *Does it help to inform decision-making for your work? Could you get the same info elsewhere?* | **Is the data accurate and consistent?**  *Data is only useful if it is accurate and consistent.* | **Are we missing anything important?**  *Consider what you would like your data to tell you. What questions aren’t being answered? Does anyone else have this info?* |
| **User data** |  |  |  |  |
| **Engagement data** |  |  |  |  |
| **Feedback data** |  |  |  |  |
| **Outcomes data** |  |  |  |  |
| **Impact data** |  |  |  |  |

## Part 3: What do we do now?

Consider what you have learned about your data from the questions in Part 1 and Part 2 and outline what this means for your day-to-day work. Also, remember to think about how you can use this information to communicate with your stakeholders in marketing documents, commissioner reports, funding bids etc. You might structure your actions like this:

|  |  |
| --- | --- |
| **“I will [continue or start] collecting…”** | **… “because it will help us to…”**  *Remember: You could use your notes from above to answer this* |
|  |  |

|  |  |
| --- | --- |
| **“I will stop collecting…”**  *Remember: If you do not need the data now or in the future, consider whether you can stop collecting it. If it is not possible to collect certain data accurately, it is not worth collecting it at all.* | **… “because it will help us to…”**  *Remember: You could use your notes from above to answer this* |
|  |  |

|  |  |
| --- | --- |
| **“I will change the way I collect…”** | **… “because it will help us to…”**  *Remember: You could use your notes from above to answer this* |
|  |  |

|  |  |
| --- | --- |
| **“I will change the way I use…”**  *Remember: If there is potential to make better use of data, work out what needs to change to make this happen.* | **… “because it will help us to…”**  *Remember: You could use your notes from above to answer this* |
|  |  |