A Data & Analytics Audit Framework for Nonprofits

How to assess your data environment, understand what's working, and create the foundations for reliable insight and evidenced impact

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3 out of 5	76%	75%+
average nonprofit data maturity score (Data Orchard, 2024)	of nonprofits lack a data strategy (Salesforce.org)	of organisations struggle with data literacy (Data Orchard, 2024)

About This Framework

This framework is for anyone in a nonprofit, charity, NGO, or social enterprise who has ever looked at their organisation's data and thought, "*Something isn't working here.*"

Maybe your reports tell different stories depending on who produces them. Maybe your team spends hours cleaning spreadsheets before they can do any analysis. Maybe your funders are asking for impact evidence you can't confidently provide. Maybe you've just inherited a data environment you don't yet fully understand.

A data and analytics audit is the starting point. It is a structured review of how your organisation captures, manages, and uses data and what needs to change for data to become a genuine asset rather than a source of frustration.

Why this framework	This framework was developed from direct experience conducting a real organisational data audit from scratch in a complex, multi-service nonprofit. It is not theoretical. Every section reflects practical decisions made in a real data environment, tested against real constraints, and validated by the findings that emerged.

What this framework covers

This guide walks you through:

- Why a data audit matters and what it can do for your organisation
- The seven dimensions of a nonprofit data audit
- How to scope, plan, and conduct the audit
- Who to engage and what to ask them
- How to assess data maturity and communicate findings
- How to write a report that drives action, not just sits on a shelf
- How to turn audit findings into an implementation strategy

It is designed to be used by a data analyst, M&E lead, operations manager, or any technically minded person who has been asked to understand and improve their organisation's relationship with data. You do not need a data science background to use it. You need structured thinking, good questions, and the willingness to look honestly at what you find.

1. Why Nonprofits Need a Data Audit

The data problem in the nonprofit sector

Nonprofits are under more pressure than ever to demonstrate impact, justify funding, and operate efficiently. And yet the data infrastructure most organisations rely on was never designed for that level of scrutiny.

The evidence is consistent and sobering. According to Data Orchard's 2024 State of the Sector report, which benchmarks data maturity across more than 1,000 organisations, the average nonprofit scores just 3 out of 5 on data maturity, and that score has shifted only marginally over four years. Skills is the worst-performing theme across all sectors, with data literacy a challenge for more than 75% of organisations. Change, the report notes, is slow.

Sector finding	Research consistently shows 76% of nonprofits lack a formal data strategy. Many collect data without a clear plan for how it will be used, who is responsible for its quality, or how it connects to demonstrating impact. (Salesforce.org Nonprofit Trends Report)

The consequences are real. Organisations that cannot reliably evidence outcomes are increasingly vulnerable in competitive funding environments. A 2025 analysis by Forvis Mazars found that nearly half of nonprofits lack sufficient funds to deliver their programmes, while donors increasingly rank programme outcomes as a primary factor in funding decisions, making the ability to evidence impact no longer optional. Funders are asking harder questions, and organisations without clean, reliable data cannot answer them.

At the same time, many nonprofits are collecting more data than they can meaningfully use. The problem is not usually a lack of data. It is a lack of data infrastructure: the governance, processes, tools, and skills to turn data into reliable, repeatable insight.

What happens without an audit

Without a structured assessment of the data environment, organisations tend to:

- Produce inconsistent numbers. The same question generates different answers depending on who pulls the report and from where
- Spend disproportionate time on manual data cleaning that should be automated
- Build fragile reporting systems that break when one person leaves, or one formula is accidentally overwritten
- Miss data quality problems at the source that compound over time and undermine trust in all outputs
- Struggle to demonstrate outcomes to funders in a way that is credible, consistent, and replicable
- Make strategic decisions based on incomplete or misleading data

These are not hypothetical risks. They are the observed reality in a large proportion of the sector. The Data Orchard 2024 report found that while culture and usage have improved, the technical and skills infrastructure required to translate data into reliable insight has largely stagnated.

What an audit can unlock

A well-conducted data audit does not just identify problems. It creates a shared understanding of where the organisation is, provides a credible basis for prioritising investment, and generates the implementation roadmap to get from where you are to where you need to be.

Specifically, a data audit enables an organisation to:

- Understand its data environment clearly and honestly, often for the first time
- Identify the root causes of reporting inconsistency rather than patching symptoms
- Make the case for infrastructure investment with evidence, not opinion
- Design governance structures that are proportionate and practical
- Build a foundation for modern BI tools, automated reporting, and outcomes measurement
- Demonstrate to funders and leadership that data is being taken seriously

Key insight	Research from Johns & Taylor (2025), drawing on data from over 8,500 nonprofits, found that organisations using integrated measurement approaches combining clean data infrastructure, CRM systems, and analytics tools reported 44% year-over-year increases in online donations and significantly improved mission outcomes. This clearly shows that the data foundation matters.

2. The Seven Dimensions of a Nonprofit Data Audit

A data audit is not just a technical exercise. It is an end-to-end assessment of how an organisation captures, manages, uses, and governs its data. To be useful, it needs to cover all the dimensions that shape whether data can be trusted and used effectively.

The framework below covers seven core dimensions. Each is assessed separately, but they are deeply interconnected: poor data quality at entry undermines reporting; weak governance creates conflicting numbers; absent outcomes measurement limits the organisation's ability to demonstrate impact. A good audit examines all seven.

Audit Dimension	What to Assess	Key Questions to Ask
1. Data Systems & Infrastructure	What systems capture, store, and extract your data? Are they fit for purpose?	What is your primary data system? How is data extracted? What are its limitations?
2. Data Quality	How complete, accurate, consistent, and trustworthy is the data held?	Which fields are consistently filled? Where are blanks, errors, or inconsistencies most common?
3. Data Governance	Are there shared definitions, ownership, access controls, and standards?	Does everyone count the same thing the same way? Who owns each dataset? Who can access what?
4. Reporting & Analytics	How is data transformed into insight? Who produces reports, and how?	How are reports produced? How long does it take? Is reporting manual or automated?
5. Outcomes Measurement	Can the organisation systematically evidence the difference it makes?	How are outcomes recorded? Are they consistent and reliable? Can you evidence impact to funders?
6. Data Culture & Skills	Do staff understand, trust, and use data in their day-to-day work?	Do frontline staff know why data entry matters? Is data seen as a burden or a tool?
7. Compliance & Ethics	Is data collected, stored, and used in line with GDPR and ethical standards?	Is a data protection register maintained? Are consent processes in place? Who is the DPO?

Each dimension should be assessed on a 1–5 maturity scale, with 1 representing an unaware or absent state and 5 representing consistent, embedded practice. The overall maturity profile across all seven dimensions tells a more useful story than a single score. An organisation might be strong on data systems but weak on outcomes measurement or have good governance processes that are not yet reflected in data quality. The dimensional breakdown shows where to focus.

3. Data Maturity: Understanding Where You Are

Before you can plan where to go, you need an honest picture of where you are. Data maturity frameworks provide a structured way to assess organisational capability across the dimensions that matter. The model below, adapted from Data Orchard's widely used five-stage framework, is designed for nonprofit contexts.

Stage	What it looks like
Stage 1: Unaware	Data collected inconsistently, no shared definitions, no analytics function. Reporting done ad hoc.
Stage 2: Emerging	Some data collection. Basic spreadsheet reporting. Awareness of data gaps but no structured approach.
Stage 3: Developing	Shared definitions emerging. Central reporting started. Data roles being established.
Stage 4: Managing	Standardised processes. BI tools in use. Governance frameworks in place. Reliable repeatable insight.
Stage 5: Mastering	Data-driven culture. Predictive analytics. Continuous improvement. Impact evidenced systematically.

Most nonprofits sit between Stage 2 and Stage 3: they collect data, produce some reports, and have staff who care about using data well but lack the governance, processes, and tools to make insights reliable and repeatable. Data Orchard's 2024 sector benchmarking places the average nonprofit at 3 out of 5, with Skills consistently the weakest dimension.

When assessing maturity, be honest. The purpose is not to produce a score that looks good in a report. It is to create an accurate baseline that makes the case for investment and guides prioritisation. An inflated maturity score produces an unhelpful implementation plan.

Practical note	Maturity assessments are most useful when done per dimension, not as a single overall score. An organisation can be at Stage 4 in data systems and Stage 1 in outcomes measurement simultaneously. The gaps between dimensions often reveal the highest-leverage improvement opportunities.

4. Planning Your Audit

Define your scope

Before starting, define clearly what is in and out of scope. A data audit that tries to cover everything simultaneously often covers nothing well. A focused audit that clearly defines its boundaries is more useful, more manageable, and more actionable.

Questions to define scope:

- Which data systems are included? (primary database, secondary trackers, funder templates, external platforms)
- Which services or projects are in scope?
- What time period does the audit cover? (A recent annual dataset is often a useful starting point.)
- Is governance and reporting included, or just data quality?
- Is outcomes measurement in scope?
- What is explicitly out of scope? (technical security review, procurement, historical data before a defined date)

Documenting scope, including what is out of scope, protects the auditor and sets appropriate expectations with stakeholders. It also ensures that findings are not inadvertently applied beyond their evidential basis.

Build your business case

In most organisations, a data audit will need to be justified to leadership before it can proceed. The business case does not need to be long, but it needs to be honest about the problem and clear about what the audit will and will not produce.

A strong business case addresses:

- What is the problem the audit is responding to? (reporting inconsistency, funder pressure, data quality concerns, system change)
- What will the audit produce? (a report, a maturity rating, a set of recommendations, and an implementation plan)
- Who will conduct it, and what will it require in terms of time and access?
- What are the risks of not doing it?

For leadership	Nearly 70% of organisations in BDO's 2024 Audit Innovation Survey identified data governance and internal data management as barriers to effective operations. An audit is not an optional extra, it is a foundational investment in organisational capability.

Estimate the time required

The time required depends on organisational complexity, the number of systems in scope, and the availability of stakeholders for interviews. As a general guide:

- Small organisation (under 50 staff, one or two main systems): 3–6 weeks
- Medium organisation (50–200 staff, multiple systems and projects): 6–10 weeks

- Large or complex organisation (200+ staff, many systems, decentralised reporting): 10–16 weeks

These estimates assume the auditor is working on the audit alongside other responsibilities, not full-time. The most time-intensive phases are stakeholder engagement (interviews) and data quality assessment (field-level review). Budget for these accordingly.

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5. Stakeholder Engagement: Who to Involve and Why

A data audit that only looks at spreadsheets and systems misses half the picture. The behaviours, constraints, and informal practices of the people who create and use data are as important as the data itself. Structured stakeholder engagement is not optional; it is central to producing findings that are credible, complete, and actionable.

Who to Engage	Why	When
Senior Leadership / CEO	Set organisational context, strategic priorities, and data vision. Their buy-in is essential.	Early — ideally first
Operations Manager	Understand day-to-day data flows, system constraints, and cross-team dependencies.	Early
Programme / Service Leads	Know how data is captured at service level, what reporting they produce, and what they need.	Phase 1–2
Frontline / Casework Staff	Closest to data entry. Understand practical barriers, field confusion, and workflow realities.	Phase 1–2
IT / Database Administrator	Understand system architecture, access controls, extraction limits, and what is technically possible.	Phase 1
Finance Team	Understand how financial and programmatic data intersect and how income is reported to funders.	Phase 2
M&E / Impact Lead (if exists)	Understand outcomes frameworks, funder reporting requirements, and evaluation methodology.	Phase 2

How to conduct stakeholder interviews

Interviews should be semi-structured: you have a set of core questions, but you follow the conversation where it leads. The goal is to understand both what is happening and why. Often, the most important findings come from unexpected directions.

Key principles for effective data audit interviews:

- Frame the interview as learning, not assessment. You are trying to understand the data environment, not evaluate individual performance.

- Ask about what people actually do, not what they are supposed to do. The gap between policy and practice is often where the most important issues sit.
- Ask about pain points first. “What is the most frustrating part of working with data in your role?” surfaces problems faster than any structured set of questions.
- Follow the data journey. Ask how data is created, who uses it, how it moves through the organisation, and where it tends to go wrong.
- Take notes in real time but synthesise later. Do not try to write the report during the interview.

Sample interview question bank

The following questions can be adapted by stakeholder group:

On data systems and infrastructure:

- What system do you use to record client or programme data? Is there more than one?
- How do you extract data for reporting? How long does this typically take?
- What are the biggest limitations of your current system?

On data quality:

- Which fields do you find most consistently incomplete or inaccurate?
- Are there fields where staff are unsure what to record, or where different people record things differently?
- Have you ever caught errors in data that had already been reported externally?

On reporting and governance:

- How do reporting requests reach you? Is there a formal process?
- Do different teams sometimes produce different numbers for the same metric?
- Is there a central place where approved reports are stored and shared?

On outcomes and impact:

- How does your team currently record whether clients or beneficiaries achieved the outcomes you were working toward?
- Are there outcome fields in your system that are consistently blank or inaccurate?
- What would you need to more confidently demonstrate your service’s impact?

6. Assessing Data Quality

Why is data quality assessment the hardest and most important part?

Data quality is where most nonprofit data problems originate. It is also the most labour-intensive part of the audit, and the part most likely to be underestimated. You cannot assess quality at a surface level. You need to look at the data itself.

The six core dimensions of data quality, completeness, accuracy, consistency, timeliness, validity, and uniqueness, should each be assessed across the key fields in your primary data system. Not every field needs the same level of scrutiny: prioritise the fields that drive reporting, inform funding decisions, and underpin outcomes measurement.

A tiered approach to field-level assessment

Not all data fields are equally important. A tiered approach allows you to focus your effort where it matters most and communicate findings in a way that is immediately useful to leadership:

- **Core —** Core fields: Fields that are used in regular reporting, funder returns, or outcomes measurement. These must be assessed thoroughly. Any quality issues here have direct operational and reputational consequences.
- **Recommended —** Recommended fields: Fields that support analysis but are not currently used regularly. Quality issues here represent missed opportunities rather than immediate risk.
- **Optional —** Optional fields: Fields that are collected but rarely used. Low investment justified; quality issues are noted but not prioritised.

For each core field, document: its purpose, current usage, sensitivity level (particularly for personal data), observed data quality issues, future analytical potential, and recommended action. A column-level review of this kind is the most granular and useful output of the data quality phase. It transforms vague concerns (“our data is messy”) into specific, addressable findings (“the Spoken Language field has significant missingness and inconsistent formatting across 15+ variants of the same language; a controlled list and mapping table would resolve this”).

What to look for: common patterns in nonprofit data quality

Based on common patterns in nonprofit data environments, the following issues appear most frequently:

- Uncontrolled free-text fields: Where a dropdown or controlled list should exist, staff are entering free text, producing dozens of variants of the same value. This is one of the most common and damaging quality issues in casework systems.
- Outcome fields used for operational notes: Staff enter narrative information in fields designed for structured outcome data because the field is visible and accessible. The outcome data is lost.
- Inferred or guessed outcomes: Where outcomes are unknown at case closure, staff record a plausible outcome rather than “unknown.” This inflates reported success rates and produces unreliable impact evidence, sometimes dramatically so.

- Overwritten data in shared Excel files: Multi-user Excel trackers are vulnerable to accidental overwrites, formula corruption, and version drift. Data that appeared to exist may no longer be recoverable.
- Duplication across systems: The same client or case appears in both the central database and a project-level tracker, often with different information in each. There is no reconciliation process.
- Missing closure data: Cases marked as active in the system have not been updated in months or years. The organisation cannot reliably report on case volumes, closure rates, or time-to-resolution.

Sector context	The 2026 CCS Philanthropy Pulse report found that 36% of organisations reported difficulties leveraging data for decision-making, up from 14% the previous year and 33% cited data management and CRM issues, more than double the prior year's figure. These are not isolated problems: they reflect systemic data quality and governance failures that an audit is designed to surface.

7. Assessing Outcomes Measurement Capability

For many nonprofits, the most important and most underdeveloped area of their data environment is outcomes measurement. Funders increasingly require evidence of impact, not just activity. And yet, as the Stanford Social Innovation Review (SSIR) has documented, most organisations either collect the wrong data, collect data they cannot analyse, or rely on informal evidence that does not stand up to scrutiny.

The distinction between outputs and outcomes is foundational:

- Outputs are what you do: the number of people served, sessions delivered, referrals made, and documents processed. These are important, but they do not, by themselves, answer the question "so what?"
- Outcomes are the changes that result from your work: whether a person achieved the legal status they needed, whether their employment situation improved, and whether their confidence and wellbeing changed as a result of your service.

Most nonprofits are strong on output measurement and weak on outcome measurement. This is understandable: outputs are captured as a natural by-product of service delivery, while outcomes require intentional follow-up, structured recording, and agreed definitions. But the gap is consequential in a funding environment that increasingly demands evidence of change rather than evidence of activity.

Key questions to assess outcomes measurement capability

- Does the organisation have an agreed definition of what constitutes an 'outcome' for each service or programme?
- Are outcome fields consistently recorded in the primary data system, or are they blank, inaccurate, or used for other purposes?
- Are outcomes collected systematically, or only for specific programmes or clients?
- Are there any processes for following up with clients after closure to collect outcome information?
- Does the organisation collect case studies, satisfaction data, or feedback surveys, and if so, how are these stored and analysed?
- Can the organisation currently produce a reliable, evidence-based answer to the question: "What percentage of clients achieved their desired outcome?"

A useful audit output in this area is a clear statement of what the organisation can currently evidence reliably, what it cannot evidence at all, and what a realistic first step toward better outcomes measurement would look like. The goal is not to create an overnight transformation; it is to identify the highest-leverage, lowest-burden change that would meaningfully improve the organisation's ability to demonstrate impact.

Research note	Research consistently shows 76% of nonprofits say impact measurement is a priority, but only 29% are doing it effectively. The gap is not ambition; it is data architecture. Organisations that cannot collect clean outcome data at source cannot retrospectively reconstruct it. The audit is the moment to identify that gap and plan how to close it. (Sopact Impact Measurement Research, 2026)

8. Writing a Report That Drives Action

The audit report is the primary output of the process. Its purpose is not to document everything you found. Its purpose is to create a shared understanding of the current state, make a compelling case for change, and provide clear, prioritised guidance on what to do next.

A report that is read and acted on is worth infinitely more than a comprehensive report that sits untouched. Write for your most important audience first, usually senior leadership/management, who will decide whether to resource the recommendations, and structure accordingly.

Report Section	What to Include
Executive Summary	1-page overview: what you found, key risks, top recommendations, and maturity rating. Written for a non-technical leadership audience.
Audit Scope & Approach	What you assessed, how you did it (methods), who you engaged with, and what was out of scope.
Current State: Systems & Architecture	How data currently flows through the organisation from entry to extraction to reporting.
Data Quality Assessment	Field or dataset-level review of completeness, consistency, accuracy. Use a tiered approach (Core / Recommended / Optional).
Governance & Reporting	How reporting is requested, produced, and governed. Identify fragmentation, duplication, and absence of standards.
Outcomes Measurement	Current ability to evidence impact. Where outcomes are captured reliably and where they are not.
Data Maturity Rating	Overall and by dimension. Use a simple 1–5 scale. Visual representation (radar chart or table) is effective here.
Recommendations	Prioritised, actionable, and realistic. Separate quick wins from longer-term structural changes.
Appendices	Detailed field-level data quality notes, KPI starter definitions, SOP templates, glossary.

Writing principles

The following principles distinguish reports that drive action from reports that inform and disappear:

Lead with the so what.

The executive summary should make the case for action in plain language. Avoid technical jargon. Every finding should be accompanied by its consequence: not just “outcome fields are inconsistently recorded” but “outcome fields are inconsistently recorded, which means the organisation currently cannot reliably evidence whether clients achieved the support they sought, a significant risk in any funding conversation.

Be specific.

Vague findings produce vague responses. “Data quality needs improvement” is not actionable. “The Referral Agency field contains over 40 variants of the same agency names because there is no controlled list. Standardising this field to a dropdown would immediately improve the organisation’s ability to report on referral pathways,” is actionable.

Acknowledge what is working.

A report that only identifies problems creates defensiveness. Explicitly naming what the organisation does well and why demonstrates intellectual honesty, builds trust with the reader, and makes the critical findings more credible.

Separate the current state from the future state.

Be clear that the findings reflect the data environment as it currently stands, not as it is planned to be. Improvements that are in progress but not yet embedded should be treated as aspirational, not as resolved issues. This protects the credibility of the findings.

Prioritise recommendations ruthlessly.

A list of twenty recommendations is not a prioritised list; it is an abdication of analytical judgment. Identify the five to seven changes that will have the greatest impact on data quality, reporting reliability, and outcomes measurement capability. Frame them in terms of what they will enable, not just what they will fix.

9. From Audit to Action: Creating an Implementation Strategy

An audit without an implementation strategy is a diagnosis without a treatment plan. The findings create momentum; the implementation strategy sustains it. Without one, even the strongest report risks being shelved after the initial leadership presentation.

A good implementation strategy translates audit recommendations into an executable plan with clear owners, realistic timelines, dependencies, and success measures. It is not a wish list. It is a commitment document.

Priority Window	Actions	Owner	Resources
Short Term (0 – 3 months)	Agree shared definitions for key terms. Create a reporting request form. Set up a central report repository. Conduct first data entry training session.	Data Analyst + Manager	Time; SharePoint or equivalent
Medium Term (3 – 6 months)	Build a repeatable data cleaning pipeline. Standardise key fields and validation rules. Pilot an outcomes measurement approach for one service.	Data Analyst + Service Leads	BI tool access; developer time if needed
Longer Term (6 – 12 months)	Full BI implementation. Organisation-wide KPI framework. Outcomes measurement embedded across services. Data literacy training for all staff.	Senior Leadership + Data Team	Budget; training investment; governance commitment

Key principles for implementation planning

- Assign real owners, not teams. “The data team” does not own an action. A named person does. If no one person can be identified as the owner, the action needs to be broken down further or escalated to leadership to assign accountability.
- Identify dependencies explicitly. Some actions cannot start until others are complete. Mapping these dependencies prevents the plan from stalling when a blocked action creates a ripple effect.
- Create review points. A monthly or bi-monthly implementation review, even a brief one, maintains momentum and surfaces blockers early enough to address them.
- Distinguish between what needs resources and what needs only time. Many of the most impactful quick wins require no budget, only coordination, agreement, and someone to do the work. Separating these from resource-dependent changes avoids using budget as an excuse to delay zero-cost improvements.
- Celebrate early wins publicly. When a recommendation is implemented, even a small one, make it visible. This builds organisational confidence in the process and maintains leadership engagement.

From practice	In one implementation of this framework, the two most impactful early actions cost nothing in budget but required significant stakeholder coordination: agreeing a shared definition of 'client' across all teams and creating a single SharePoint library for approved reports. Both changes reduced reporting inconsistency within weeks of implementation. The data infrastructure investment followed because the organisation could now see clearly what it was working toward.

10. Common Pitfalls and How to Avoid Them

Even well-planned audits encounter predictable problems. The following are the most common failure modes, drawn from practice and sector research:

Pitfall 1: Audit scope creep

The audit expands as it progresses, incorporating more systems, more stakeholders, and more questions than originally planned. The result is an unfocused report that is difficult to write and harder to act on. Mitigate by defining the scope clearly at the start and explicitly noting when findings fall outside it, rather than incorporating them.

Pitfall 2: Findings without root causes

Reporting that "data quality is poor" without identifying why is not analytically useful. Most data quality problems have identifiable root causes, no controlled lists, unclear field definitions, no closure process, staff uncertainty about what to record, etc. Trace findings to their causes; the recommendations that emerge will be far more targeted and effective.

Pitfall 3: The report is written for the auditor, not the reader

Technical thoroughness is not the same as communicative clarity. If the executive summary requires data literacy to understand, it will not be acted on by senior leadership or management. Write the executive summary as if the reader knows the organisation but has no data background.

Pitfall 4: Recommendations without prioritisation

A long list of equally weighted recommendations puts the burden of prioritisation on the reader, who will often default to doing nothing or only the easiest items. Prioritise explicitly. Distinguish between what is urgent, what is high-impact, and what is aspirational.

Pitfall 5: The report is presented once and never revisited

The audit is a starting point, not an endpoint. Build in a review process: a three-month check-in on implementation progress, a six-month re-assessment of key quality metrics, and an annual re-evaluation of data maturity. This transforms a one-time exercise into an ongoing improvement cycle.

Pitfall 6: Treating ongoing improvements as resolved issues

It is common for organisations to begin making changes during the audit period and to want those changes reflected as completed in the findings. Resist this. An improvement that is in progress is not an improvement that is embedded. The audit reflects the current state; the implementation strategy reflects the path to the future state.

Conclusion: Data as an Organisational Asset

The nonprofit sector exists to create change. Data is one of the most powerful tools available to understand whether that change is happening, to demonstrate it to funders and partners, and to use it to continuously improve.

But data that is fragmented, inconsistent, ungoverned, or misunderstood does not enable any of that. It creates noise, inefficiency, and risk. A data and analytics audit is the structured, honest assessment of the gap between the data environment an organisation has and the one it needs.

This framework provides a starting point. The seven dimensions give you a map of the territory. The maturity model gives you a language for describing where you are. The stakeholder engagement guidance ensures you capture the full picture. The data quality assessment approach turns vague concerns into specific, actionable findings. The implementation structure ensures that findings become change rather than documentation.

The organisations that will demonstrate impact most credibly, attract resources most consistently, and serve their communities most effectively in the years ahead are not necessarily the ones with the most sophisticated technology. They are the ones that take their data seriously enough to understand it honestly, govern it responsibly, and use it intentionally. A data audit is how that journey begins.

Appendix A: Audit Readiness Checklist

Use this checklist to assess your readiness to begin a data audit and to track progress through the process.

Before you start

1. Audit scope defined and documented (systems, services, time period, exclusions)
2. Business case prepared and approved by senior leadership or management
3. Stakeholders identified and interview schedules created
4. Access to the primary data system and key datasets confirmed
5. Confidentiality and data handling approach agreed (especially for personal/client data)

During the audit

6. Stakeholder interviews conducted across all relevant roles
7. Primary dataset(s) reviewed at field level
8. Data quality assessment completed for all core fields
9. Reporting and governance processes documented
10. Outcomes measurement capability assessed
11. Data maturity rated across all seven dimensions

Report and implementation

12. Executive summary written in plain language for a non-technical audience
13. Findings include root causes, not just symptoms
14. Recommendations are prioritised (short-term, medium-term, longer-term)
15. Implementation strategy created with named owners and timelines
16. Report presented to senior leadership
17. Implementation review schedule agreed

Appendix B: Sample KPI Definitions Starter Set

One of the most immediate and high-impact outputs of a data audit is a shared set of definitions for the terms your organisation uses to count and report its work. Without these, the same question can produce different answers depending on who answers it.

The following starter set can be adapted to your organisational context. Each definition should be reviewed, discussed, and formally signed off by relevant stakeholders before being published as the organisational standard.

Term / KPI	Recommended Definition	How to Count It
Client / Beneficiary	A unique individual who has received direct advice, support or service from the organisation.	Count unique IDs or reference numbers. Deduplicate before reporting.
New Client (period)	A person whose first-ever registration falls within the reporting period.	Count unique IDs where registration date falls within the date range.
Case	A distinct issue or request for help opened for a client on a specific date.	Count each case record once using case date. Deduplicate appropriately.
Interaction	Any activity linked to a case (call, email, meeting, form completion).	Count by interaction date and type. Link to case or client ID.
Closed Case	A case marked as closed following agreed closure criteria (e.g. outcome known or follow-up exhausted).	Count cases with a valid closed status. Deduplicate accordingly.
Outcome Achieved	The client achieved the intended result of the case as recorded in the outcome field.	Use controlled values: Achieved / Partially Achieved / Not Achieved / Unknown. Do not leave blank.
Beneficiary (distinct from client)	Where an organisation counts people affected indirectly by its work (e.g. family members), document how this is defined and counted separately from direct clients.	Define calculation method explicitly and document assumptions.

These definitions should be published in a glossary tab on every dashboard, in a definitions section of every formal report, and in a shared document accessible to all staff involved in data entry or reporting.

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Tess Ogamba is a Data Analyst with a BSc in Biostatistics and almost a decade of experience across research, policy analysis, programme evaluation, and analytics. She has worked in Kenya and the UK across government programmes, private sector research firms, NGOs, and complex multi-service organisations.

Her work spans data infrastructure, governance, and impact measurement. She designs data systems from the ground up, creates governance frameworks that are proportionate and practical, and specialises in translating fragmented, inconsistent data environments into reliable, decision-ready insight.

She also creates data and professional development content for a growing audience of 300,000+ across platforms with a focus on making complex analytical thinking accessible to practitioners at every level.

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How to Cite This Framework

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