



► Developing a data inventory

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This reference guide provides employers' and business membership organizations (EBMOs) with guidance to develop a data inventory. It supplements the ***Guidance for Employers' and Business Membership Organizations to Position and Use Data as a Strategic Asset*** handbook.

► What is a data inventory?

A data inventory is a list that provides details of all the data an EBMO maintains. Such details include what data exist, who collected it, for what original purpose, where data are located and who has access to them, among other useful information.

A data inventory helps improve data collection, analysis, storage, sharing, retention and retirement practices. The data inventory helps staff understand what data are available and where and why it is needed. Additionally, a data inventory increases the extent to which data are accessible and shared across departments, units or divisions.

► What data should be included in the data inventory?

Managing data takes time and resources. It is important to be selective when deciding which data are required to support your objectives. Not all data are useful or needed. Staff who create or access data across departments, units or divisions should be consulted to determine what information is used at the operational level. This would help clarify what should be included in the data inventory. The following questions are useful to define the scope of the data inventory.

- Will both digital and physical data assets be included in the data inventory?
- Will data generated by external parties (such as the government statistics office) that are used to support the EBMO's work be included in the data inventory?
- Will conversations with members or partners or other forms of unstructured data be included in the data inventory?
- Will data from all departments, units or divisions be included in the data inventory?

Establishing a data inventory is an essential part of creating a data management strategy (see the reference guide on developing a data management strategy). Data assets considered in the data inventory should be taken into account for the data management strategy and vice versa.

► What details should populate the data inventory?

It is important to be realistic about the level of detail that staff will comply with to ensure that the data inventory is always up to date. Each EBMO should decide which details to include in the data inventory based on their needs. The following details or attributes could be included in the data inventory

- **ID:** Unique number that identifies each datum or data set.
- **Title:** Unique name for each datum or data set.
- **Content:** Short description explaining what the data entails so that other staff quickly understand the content.

- ▶ **Purpose:** Short description explaining why the data were collected or generated.
- ▶ **Data creator:** Name of person or organization who created or generated the data.
- ▶ **Data owner:** Name of person or organization who manages the data set.
- ▶ **Department:** Name of department, unit or division that manages the data (membership, research).
- ▶ **Location:** Physical or digital location of the data.
- ▶ **Creation date:** When the data were collected or generated.
- ▶ **Update frequency:** Recommended frequency to update data (monthly, quarterly, annually).
- ▶ **Type:** Description of data set by (text, numbers, images, database).
- ▶ **Format:** Format of data (Word, Excel, JPEG, CSV).
- ▶ **Restrictions:** Short description of any restrictions in terms of who can access and use of the data.
- ▶ **Sensitive or confidential data:** Short description of any sensitive or confidential data that restricts with whom it can be shared.

The list is extensive. It is recommended to decide what level of detail to include and maintain a high level of consistency for all data sets in the inventory. The data inventory should also include considerations of data quality to signal whether each data set is of high, medium or poor quality. Data set quality can be ranked from 1 to 10:

	10	High quality: Data are complete, accurate, understandable and updated regularly.
	5	Medium quality: Data are somewhat complete, accurate, understandable and updated fairly regularly.
	1	Poor quality: Data are not complete, accurate, understandable or updated regularly.

▶ How to ensure the sustainability of the data inventory?

It is recommended that staff from different departments, units or divisions populate the data inventory as soon as they create or generate a new data set.

Staff should be made aware of their responsibilities to maintain the data inventory (or parts of it) so that its contents are always up to date. Job descriptions should be modified to ensure that maintaining the data inventory is part of staff responsibilities.

All staff should be involved in the effort to create and maintain the data inventory. However, this effort should be led by the data steward, who is a designated staff person responsible for implementing data use and security practices across an EBMO. The data steward should regularly check that the data inventory is appropriately used and up to date to ensure that it remains useful and sustainable.

▶ Next steps

This reference guide includes a form that EBMOs can use to develop their data inventory. This form 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 inventory form

The following form can be used to guide the creation of the data inventory. This form can be used as is or modified based on an EBMO's needs or preferences. The data inventory should be kept in an accessible location, preferably in digital form and in formats that staff know how to use (such as Microsoft Excel).

Title	Content	Purpose	Data creator	Data owner	Department [Unit or Division]	Location	Creation date	Update frequency	Format	Quality

