Monitoring, Evaluation and Impact: A call for change

Position statement, January 2016

Introduction

In the current climate of increasing need for community resilience, our vision is to begin a conversation through which we collectively seek more dignified and meaningful ways of ensuring services provided in the community are both accountable to their funders and reflective of the needs of those who access them. Specifically, we wish to draw attention to the issue of **community data burden** and the increasing need for **simple and dignified community data collection**.

This position statement seeks to support dialogue on these issues and proposes a **call to action** based on consultation with 68 community organisations (74 individual representatives). This call to action has relevance to a range of stakeholders involved in the monitoring and evaluation of services provided in the community. We recognize that this is a challenging area but in being member led have responsibility for representing the experiences of our members. In doing so, this call to action asks for a solution-focused conversation with funders and commissioners based on an agreement or 'concordat' through which all those concerned seek to recognise and reduce community data burden.

Background

The Monitoring, Evaluation and Impact (MEI) Partnership was formed in response to a capacity building need identified by voluntary and community organisations in Brighton and Hove. The partnership was initiated by Community Works, brokered by Community University Partnership Programme and responded to by the University of Brighton. The partnership has brought together academic knowledge of data collection, analysis and research ethics with intelligence and current experience of sector needs to develop a capacity-building approach that enables community practitioner expertise and experience to come to the foreground.

Consultation

Formed in June 2014, the MEI Partnership has co-designed and delivered 7 MEI workshops across the South East region and one symposium event hosted in Brighton and Hove. In total, these events have attracted 74 attendees from 68 different community organisations across the region.

The workshops have provided an opportunity for voluntary and community organisations to voice their significant and widespread concerns regarding the community data collection and reporting environment. With their permission we have collated and summarised their feedback into a position statement and as directed by attendees of the MEI symposium, we propose a **'call to action'** based on the need for proportionate and appropriate community data practice which prioritises the dignity of people seeking support in our communities.

Therefore, as **a matter of dignity**, this call to action asks for community data practice that is:

I.   **Proportionate**
II. **Appropriate**

University of Brighton

Social Science Policy and Research Centre

University of Brighton

Community University Partnership Programme

COMMUNITY WORKS

CHARITIES • VOLUNTEERS • BUSINESSES

I.   Proportionate

Key Issues

Impact of multiple income streams
- multiple short-term grant applications
- multiple monitoring and evaluation requirements

Implications for organisational capacity
- implications for data collection, storage, analysis and reporting requirements
- impact on volunteer training and retention

Impact of multiple income streams

The funding environment for voluntary and community organisations is such that their sustainability depends on multiple income streams. In Brighton and Hove on average 47% of voluntary and community sector income comes from service contracts and 17% from grants (Taking Account 3, June 2014). Grant and contract-based income streams are time limited, lasting between 6 months and 5 years, after which point re-application is required. In addition, each individual grant or contract held brings individual requirements for monitoring, evaluating and measuring the impact of funded activities. For the majority of organisations monitoring and evaluation requirements are stipulated by the funder.

A single 'encounter' or point of contact with a person seeking support may be funded by multiple income streams. For example, a drop-in or outreach service may provide access to money-related, health-related and advocacy-related programmes of support. Each of these three programmes is likely to be individually funded with each funder stipulating its own data collection requirements. Organisations are obliged to meet these requirements in order to be eligible for future grants or contracts. These data collection requirements are likely to include: an equal opportunities monitoring form containing an average of six questions and an outcome-centred monitoring survey consisting of 20 or more questions. Figure 1 below shows the relationships between multiple funding streams and their implications for the amount of data collection potentially directed at the encounter.

Figure 1
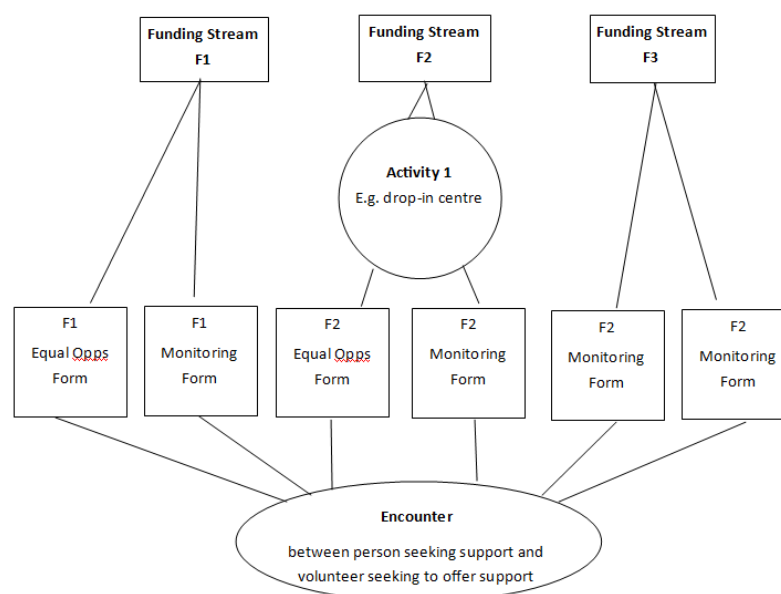
The quantity of data collection directed at the encounter quickly becomes disproportionate to the encounter itself. These effects are exacerbated when funder monitoring requirements are measurement-related whereby funders insist on a specific scale, survey or target for return rates. In a number of cases, it was reported that contract and grant managers stipulate how many monitoring forms they expect to be returned (e.g. 90% or in some reported cases 100%) along with a stated expectation that the majority of service users should report an improvement in specific measured outcomes, such as 'activity levels' or 'confidence'.

Call to action: funder and recipient organisations recognise and seek to reduce the quantity of data collection that the funding environment imposes on people seeking support in our communities.

Implications for organisational capacity

The majority of organisations consulted considered these requirements excessive yielding little if any data that informed organisations about the people they support. Nonetheless, since successful re-application for funding is dependent upon meeting monitoring requirements, collecting funder-requested monitoring information remains a strategic priority. Collecting, storing and reporting out monitoring information absorbs significant amounts of volunteer and paid staff capacity and requires staff and volunteer training in this task. Clear justification as to why data is required, how it is used and what broader benefits it produces is typically absent, making this expenditure increasingly hard to justify.

Call to action: in the current climate of reduced public spending, funders and commissioners have a responsibility to proactively demonstrate their awareness of this data environment and seek ways to reduce the data burden experienced by community organisations by asking those organisations to indicate what level and form of data collection they think is proportionate and appropriate.

Implications for volunteer experience

For volunteers, who have elected to give their time freely to be of support to others, a focus on data collection and storage often detracts from their capacity to engage in person-centred work. Many organisations described this tension as difficult and costly to manage with regular data audits and training required to ensure data is collected according to funder requirements. Volunteers and paid workers report an acute unease at the lack of ethical regard for the quantity and nature of questioning they are required to undertake.

Call to action: volunteer feedback on the experience of asking multiple questions about people and their personal situations should be heard and the ethical burden placed on them by this questioning attended to and reduced.

II. Appropriate

> **Key Issues**
> Implications for the citizen experience of seeking support
> - surveying citizens who are in crisis or need is inappropriate
> - intrusive and personal nature of questioning
> - directed toward citizens who are at their most vulnerable
>
> Implications for volunteer motivation
> - conflicts with volunteer values of seeking to support people in the community through person-centred communication

Implications for the citizen experience of seeking support

Voluntary and community organisations who attended the MEI workshops reported serious concerns over the purpose and ethical standing of community data collection. People seeking support in the community can be experiencing complex, challenging and distressing situations. To be asked multiple questions at these times of crisis or need, especially where those questions are of an intrusive or personal nature, can be inappropriate. For example, asking someone who appears vulnerable and socially isolated a set of questions that includes 'how lonely have you felt?' asking them to respond on a scale of 1 to 5 from 'extremely lonely' to 'not lonely at all' is likely to be upsetting and yet this could be 'a standard question' that volunteers have to require them to answer. In addition, monitoring requirements often place a need on community organisations to collect data from people **the very first time they make contact with a service(s)**. This is frequently when they are experiencing the most profound need. However, in many cases, data is collected at this moment because this constitutes the 'before' measure against which it is assumed an 'after' measure can be compared if contact maintained.

Call to action: protecting the dignity of people seeking support through ensuring they are not inappropriately questioned at times when they are in need or experiencing crisis **has** to be the foundation of all community data collection practice.

Implications for volunteer motivation

Offering a timely, informed and empathetic response to the situations facing people in the community was reported to be one of the most crucial roles that community organisations feel they fulfil. This informal, person-centred response that organisations aspire to often constitutes a counter-experience to people who have found engaging with institutional public or statutory services challenging. However, the quantity and nature of questioning required in order to meet monitoring requirements alters the character and tone of these vital encounters.

In this context, volunteers are placed in the difficult position of being required to collect data at times and in ways in which they feel deeply unhappy about due to the need to meet funder requirements. Crucially, this aspect of their role may be unaligned with their personal motivations for volunteering. Many responsible for overseeing volunteer activity described the situation as lacking in dignity with the only justification for data collection being one of 'the need to ensure continued funding'. Some had sought to find 'workarounds' to reduce the burden on people seeking support.

A matter of dignity

We envisage a City where ensuring the dignity of people seeking support in our communities is a priority shared by all those involved in funding and offering support and where accountability is maintained through simple, substantive data reporting that enables us to learn and collectively respond to the needs of our communities.

We ask voluntary and community organisations, commissioners and funders to consider this call to action and to respond. We propose a next step is to seek agreement on the need to reverse the trend for excessive data collection requirements that result in a loss of dignity for people seeking support in our communities and which are disproportionate to the encounter. We encourage those concerned to invoke a **community data agreement** through which principles of proportionality, appropriacy and dignity can be collectively invoked and upheld.

Through ongoing dialogue with funders, grant professionals, commissioners and contract managers we would encourage a **community data agreement** that:

- Refocuses on the support of citizens rather than requirements to collect data from them
- Reorients data practice around maintaining dignity
- Prioritises compassion in citizen experiences of seeking support
- Assesses proposals for data collection according to their capacity to support person-centred values and maintain dignity
- Recognises and takes action to change methods of data collection which place undue strain on organisations and citizens
- Recognises examples of good community data practice that ensure compassion and dignity within the sector.
- Protects citizens from over-surveying and implements alternative methods of assessing performance and ensuring accountability that are simple, substantive and dignified

MEI Partnership 21.01.16

#databurden

University of Brighton

Social Science Policy and
Research Centre

University of Brighton

Community
University
Partnership
Programme

COMMUNITY
WORKS

CHARITIES • VOLUNTEERS • BUSINESSES