Outcomes Practice
Evidence Network
Child and Family
Services

Establishing a whole of organisation Monitoring and Evaluation system – Mission Australia (AES Seminar session) - Comments and questions from audience

How to scale to smaller organisations with less resources?
The foundations remain the same, to ensure you know what your minimum data standards. It's about the principle of action, democratisation of data, and whatever you've collected is treated with care, regard and is used in the context of that person's life.

How do you change or develop an evidence culture and mindset? We started with a pilot of 12 services. We learned from our mistakes. When we started using outcomes measurement with the case manager to note what changed for the client. We also ensure case workers and clients didn't feel judged by performance, but to understand why certain changes happen (or don't). Funders measure providers based on performance, so there needs to be a strong push internally to funders too.

What are some critical factors to build a common understanding, language and capability? Find your champions, the people who 'get it' and promote the heck out of it. There will be some people who immediately want to champion this and will pull the others along. They'll help to take the fear factor out of it for others. It's a continual challenge for data literacy in the sector, as most of those in the sector are social workers that want to work with people! This is changing across the sector, but it's a continual challenge.

How did you balance between different demands from the organisation, accountability, funders, service recipients etc? 5 years ago, the funders would have driven our data strategy. Now, we drive it, and the funders get it. We wanted to understand the differences across programs and contexts.

What are the data tools you use? We use alchema for our surveys, which is both qualitative and quantitative. We use an API, and Microsoft stack (Power BI), and variety of statistical tools eg SPSS, and salesforce for employment services. We hold a lot of data in the 'lake' (cloud), which unlocks this system wide approach at a service level.

Does a sophisticated MEL cycle result in significantly better services for clients? We're finding some great learnings through these cycles, but it's a work in progress. This cycle will be complete in 12 months. Anytime a service can collect client data is surely going to have an impact for our clients and communities.

How are you engaging clients in developing Theory of Change, goals, and identifying actions? This is crucial! Service design and innovation team engage in the development of Theory of Change, we also consult in identifying and measuring outcomes. We also have an evaluation management procedure, where at the end of any formal evaluation we feedback to the clients through either a summary or workshops with clients.

Big or small, what are the three top benefits from taking an organizational systems point of view, rather than outsourcing to academic consultants?

- Relationships. Having an internal function and capability means we can hear how our services are being delivered, the challenges etc. We understand our organizational context. If you were outsourcing that, those opportunities would be few and far in between.
- It's a values and ethical principal. The change happens with the client and caseworker, so the data should be there and the learning should happen as close to that relationship as possible

Value for money. Outcomes are provided to the best degree possible.

Enjoying the presentation Rachel! Would be great to hear a bit how did you balance between different demands from the organisation (accountability to donors/supporters/partners/service recipients, project management, evidence for advocacy work; fundraising etc.).

In general terms, the purpose of an evidence function in large NGOs is typically twofold; to drive client outcomes and service performance improvements, and also to develop compelling examples from within the organisation that can be used for policy/advocacy, business development and/or fundraising. Each organisation must determine the relative importance of each purpose to determine the balance between the two. At MA, we weigh the first purpose – to drive client outcomes and service performance improvements – heavier than the generation of promotional examples as this is clear in our organisational strategy. That said however, we believe that as we demonstrate our achievement of the first purpose in strategically important areas that compelling case study examples will follow. Rachel

Program data comes in all shapes and sizes, what is the approach to preparing data from different sources for analysis?

My answer might not be the direct answer you're looking for – but our approach is really about getting the best data in at the point of entry. This is done in a number of ways: mandating some practices through the CRM to ensure data quality, accuracy and completeness; training / training / training (!) and through validation processes that sit outside the CRM and show workers and management errors and/or missing processes and data. Then also of course, strong documentation of data definitions, data schemas and process flows. Rachel

We are currently focusing on establishing sustainable processes to consolidate and prepare date across the organisation through the MEL process. This includes 1) structuring our data around an interaction ID, clientID and/or a service ID, 2) developing calculations in PowerBi to prepare and extract the data (i.e. merging multiple rows of data against a client), 4) establishing syntax in SPSS so we can automate the merging and analysis of multiple files against the Monitoring and Reporting Framework, 4) using PowerBi to develop Dashboards that display data from multiple sources. Cherie

Yes, also interested to know what tools you use for survey data and how you integrate it with other data.

We use a product called Alchemer. It integrates with our Microsoft CRM so we can track and monitor individual clients responses. Before our Microsoft CRM, we entered a client id manually into the Alchemer system, which did create data entry errors. These two data sets then get joined in our data lake through their client id and interaction id. Rachel

Great presentation. My apologies if you covered this at the beginning (sorry had problems getting in) but I would love to know how you approached your approach for the team and the organisation. Was there a lot of sussing out the needs of the services areas and understanding

I'd say it's been iterative and has been driven by our org/team priorities. Depending on your service areas capacity for this work, I'd be hesitant to overwhelm them with everything unless you have the resources to support them well. For MA, first up was establishing and rolling out the IM program which we gathered like-services together to design a client outcomes pre and post survey tool using a program logic which gave them an idea about outcomes indicators (2017-2019). Then, we went through a major technology transformation and had deep conversations about funder requirements and service minimum data sets and what was good practice (2020-2021). Now, it's about the MELs and using all the data we have to better understand the context of services and for different cohorts. Rachel

As Rachel has mentioned the organisation has been on a long journey to build the capability to understand the importance of data and then to get data in (i.e. systems and processes). All of the has laid the foundation for the MELs, which are all about bringing together, synthesing and making sense of multiple data sources. In saying that our continued engagement with services at all stages of the process to understand their needs is critical. This is done through the development of our Flagship Service Models and also the MEL process. Cherie

Loving the presentation. You spoke about multidisciplinary approach and qual data. What qual data did you integrate and how?

While integrating qualitative data into our approaches is still in early days, we have a few things in our work plan. We have started integrating the Most Significant Change technique into our IM approach and we're rolling this out systematically now. Also, using free text fields in our CRM like caseworker notes which will likely yield a more nuanced understanding of what is happening in that person's life. Rachel

We in the early days of piloting Most Significant Change in the organisation, collecting stories from clients and staff. The plan over the next 12-18 months will be about scaling the approach and then embedding the story reflection and selection in the Evidence to Action process. Cherie

Do you use external datasets to track org progress against (eg: global indexes), as well as collecting your own data?

For your program evaluation or research projects, do you use or integrate datasets from ABS or other external data sources?

I'm answering your questions together! Yes we have a range of external data sets in our data environment. Generally, we have primarily used them for identifying areas of unmet need and for local service planning. In communities where we have a long-term community facilitation or backbone role and in our service category MELs we have identified appropriate external data points that we are tracking. On my work plan this FY, I'm determined to get a data linkage project up but we haven't done this before. I'm finding the quoted costings for MADIP data linkage a real challenge! Rachel

Thanks Rachel for your presentation, really interesting as I'm also in the same position of helping to build an organisational M&E system. One challenge for me is setting the culture of wanting to "learn" from your data. e.g. we have a problem of collecting lots of data but not doing anything with it. Curious how you helped set this learning culture?

Promote the heck out of your champions! Document and promote those services or examples that learn – take short videos, quotes, get them to speak to others. Make it fun. Make it useful. Rachel

Services need to see the data to value to data. Look for interesting ways to present data. For example we use a lot of infographic and visually client journey to engage services in the data (i.e. making complex insights as simple as possible). Work with your leaders to ensure that their clear expectations around the time and resources required (i.e., participation in a workshop) and have them communicate the benefits to staff. Establish a process for learning, ours is an Evidence to Action process, this is embedded within our evaluation policy. Also find a service, work with them closely, to identify areas they want to address and then use that as a case study across the organisation to generate interest. Cherie

Do you have access, inclusion and equity measurements in your ME strategy?

Across each of the Monitoring and Reporting Frameworks we have a range of measurements around equity priority groups/cohorts and are exploring access and inclusions in terms of service delivery as well as outcomes when analysing the data and developing Evidence to Action plans. Cherie

On Monitoring & reporting framework: Is the Theory of Change set at whole of organisation level, or service/project levels?

There are a few different levels in the organisation:

- Organisational outcomes hierarchy- we are currently streamlining this through the Mel development.
- Foundational Service Categories- work in progress. As we progress the MELs the plan is to have some high-level outcome maps/pathways for each Foundational Service Category ((i.e. Homelessness) to articulate the contribution of different service model to common outcomes.
- Flagship Service Model Theory of Change - grouping common service models/types together.
- Service level - program logic and/or outcome map that was developed as part of the Impact Measurement program

Cherie

What survey instruments do you use to monitor health and wellbeing? - are they based on existing instruments or have you developed your own?

The common outcomes tool we use is the Personal Wellbeing Index. This is the core instrument of the Impact Measurement program. Depending on a service program logic and/or funder requirements additional tools are also added. They will vary depending on the service, for example an AOD service will have specific health tools vs a mental services. With the MELs we are aiming for greater consistency across services. Cherie

Love idea of Evidence to Action plans and reflective practice - wondering whether you could provide an illustration of the types of actions developed in response to evidence

I didn't answer this one well on the night! We have recently been piloting the Evidence to Action process with some of our children and family services. This has included workshops with leadership, managers and staff. From that process a range of actions have been identified to further support vulnerable families to engage in our services for longer in order to achieve their goals. This includes the development of a Practice Framework at an organisational level to support staff to deliver evidence-informed practice and a range of local level actions developed in response to local context and data insights. Some local actions include: the delivery of a men's program to improve support for young fathers/male carers, increasing access to therapeutic support to address parental trauma, organising community events to increase connections, developing culturally safe processes to engage Aboriginal and Torres Strait Islander and/or CALD families and building relationships with Aboriginal controlled organisations. We are excited to monitor the impact of these actions over the next 12 months and hopefully be able to share what worked across the organisation and the sector. Cherie

Hi Cherie - Such great presentations. I was just wondering how at Mission you are engaging consumers; in developing Theories of Change, MEL and then taking the data and developing insights/ actions from the data/ identifying the improvements. Q2) As someone else mentioned I am interested in the surveys you are using to understand wellbeing and satisfaction? Thanks.

Wonderful presentation, thank you - have you developed any client centred ways of sharing service outcomes and impacts so that clients can decide if they want to take up MA services?

I have grouped these questions together with a focus on engaging clients and consumers! I mentioned in the presentation that this is a core focus in our work, something we are exploring more and more. We engage clients through the development of the Theories of Change and the MEL signs of progress (we use client centred resources and paid participation). This provides valuable insights to ensure we are measuring the outcomes that matter most to clients. Part of evaluation policy is disseminating data and findings to clients either through resources and/or interpretation of insights/service improvements ect. We are currently thinking of the best way to do this with the homelessness MEL so it's a work in progress! Cherie

Really interesting and clear presentation - thanks very much. I missed the begining of the session. Would be really interested in getting a feel for the amount of organisational resources allocated to the overall MEL effort in Mission Australia.

I covered this somewhat at the beginning and showed the MA Centre for Evidence and Insights structure. Cherie's team has 5 FTE who are responsible for MELs, but also all the client outcomes collections (incl funder mandated) and any evaluations (internal and commissioning external projects). I think actually the real effort is invested by services in committing to reflective activities and taking teams off-line for workshops! Rachel