

Using Data to Tell Your Story

A short guide & examples from the NE partnership with North East Law Centre and Justice First

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1 Background to this work

Since July 2022 Apteligen have been supporting a joint project between the Justice Together Initiative (JTI) and the Justice Lab to provide data practitioner support to the North East Law Centre (NELC) and two of their partners in the NE Partnership who are funded by JTI - North of England Refugee Service (NERS) and Justice First. The aim of the project was to improve their data maturity¹ by supporting the partnership to better understand the data they collect about client profiles, engagements and referral pathways.

One of the specific objectives of the project was to develop guidance for legal advice and support organisations, to help with developing compelling case studies and stories which draw upon quantitative and qualitative data.

We provided training and created stories with NELC and Justice First. Our thanks to these organisations for their hard work and commitment to this process, and their permission to share their case studies here.

This short guide shares the steps and approaches we used to develop the two case studies. We hope this provides a useful framework with practical tips for developing case studies that combine qualitative and quantitative data. The appendix includes the case studies we produced with each organisation in our work together.

2 What this short guide can help with

The purpose of the guide is to help set out a clear journey to tell useful and useable stories with your data. It takes time to identify a focus, pull together the relevant sources of internal data, search for any secondary data that might be useful to include, and finalise the words and design of your case study. By breaking the journey down into steps and working with data you already have, you can develop the stories you tell about your work to fit your available capacity and data.

What this guide cannot do is identify the specific type of case study that would be best for you to produce at your organisation. As we will see in this guide, the decisions on approach, format and topic will depend on your purpose and the context you are working in.

Finally, there are many other guides and resources available on producing case studies, data visualisation and so on. At the end of this document we have included a few links to resources we have found to be helpful in our work, as well as some that we haven't used but that look interesting.

3 What we mean by 'data'

When we talk about 'data' we take a broad definition of what that includes. 'Data' includes all the types of information an organisation might collect, store, analyse, and use. Data can be recorded in many formats: numbers, text, images, video, maps. For example, it might include:

¹ https://www.dataorchard.org.uk/resources/data-maturity-framework

- Information about the people you serve (i.e. clients, people seeking advice) and unmet needs.
- What they seek advice about, services they receive, legal process they are supported with (matter type).
- Clients' experience of case management and the support they receive, from client feedback/satisfaction data.
- Resources involved in delivering services (money, time, expertise, staff, volunteers), and how this changes over time.
- Outcomes/impact measures (e.g. for JTI the number of people assisted/advised, the number of OSIC level 2 staff hired etc.).
- Information about population needs/the environment, held internally or externally (e.g. Legal Needs Surveys).
- Performance monitoring, evaluation and governance.

4 What we mean by 'case study'

A 'case study' is an approach in which a particular area of focus (for example, a person, theme, site or project) is described in depth. This is usually in a narrative format, as a story, although case studies often combine qualitative and quantitative data to do this.

For the purposes of this guide, a 'case study' is a way to combine different types and sources of data to tell a discrete story about your work.

Case studies can be a useful way to communicate about your work. This can be to describe what is happening, convey a specific message, or try to influence or create change in some way. The exact approach will depend on your intended audience and purpose. For example, stories on websites of the experiences that individual people or families have been through, and how they have been assisted, can humanise an issue and make the importance of the work taking place clear and tangible.

For this guide, we focus on how to combine stories that organisations often have to hand about people they have worked with and the difference their work has made, with different types of data. In particular we think about how quantitative data can be combined with this to tell richer, and more influential stories. There is no 'one size fits all' approach to combing data sources into useful stories, which makes it unhelpful to provide a very specific template or format for doing so. It is more helpful to think of developing case studies as a process, perhaps with a supporting tool for gathering data. For example, we have previously developed Excel tools that automatically calculate cost savings when populated for an individual which can then be used to build a case study. Similarly, there could be an interview schedule that is used to ensure core information is collected to build a standard case study.

In the rest of this guide, we outline some steps to support you to build useful case studies with different types of data and provide some examples of the different approaches you can take.

5 How to tell stories with data

We collect data for a number of reasons, such as to inform decisions, understand impact, and to report to and influence others. To do this, you need to share the information you have gathered in a way others can understand and engage with. One of the of the most powerful communication methods is to tell stories with data that demonstrate a change, or make the case for action of one kind or another.

For your case studies to be effective at telling these stories, there are a number of useful steps to go through when you are planning them. The options and questions to consider under each step are not exhaustive; you may have different and / or additional areas of focus and concerns that you want to address.

• Who is your audience?

- Who is it you are trying to influence? Are they people who are familiar with what you do?
- Are they people who understand or are already familiar with the kind of data you have?
- o What do we know has been influential with this audience?

• How do you want them to use the case study (thoughts, feeling, action)?

- Do you want your audience to feel moved by an individual's journey?
 Confident that you are delivering impact? Thinking about the way they could work with you? Or something else?
- This informs what kind of data story they will respond to something that is emotive (like an individual's story) or are they more influenced by seeing numbers or financial impact?

• What impact do you want it to have?

- o What do you want to happen as a result what would be different?
- Do you want people to provide funding / make use of your service / connect you to others / work in partnership with you?
- What else is needed for your story to have this impact what needs to be happening in the wider environment, particular timeframes of events, quantity and replicability of the data; relationships – routes to influence, advocates / champions of your story?

• What format should it take?

- A strong visual that sticks in peoples' minds snapshots that they can remember and share?
- A detailed written story that contains the information that you want people to understand?
- A video which could have beneficiaries or staff telling a story directly and / or a narrative that describes the story?
- Charts and graphs presenting numeric data?
- o What combinations would be most influential to your intended audience?

• What data should you include?

- What data do you know you already have that could contribute to this story?
- What data would you like to have to tell this story, what would be the steps and timeframe towards being able to have this data?
- What secondary data sources (data collected by others, for example academic, government data, geodata, and census or other population or large survey data) could be relevant to this story? The secondary data can be used to reinforce your argument and show how the impact that you make fits into a wider context and why it is important.

• What legal and ethical considerations are there?

- Do I have permission to share this person's data in some way? E.g. can I share it in a way where the individual cannot be identified or are they happy to be identified?
- Is there a risk of harm to this individual or a wider group of people by publishing this case study?

• Is it a replicable process underpinned by a tool?

 Consider the replicability of what you are creating. Do you want to build up a bank of similar stories so people know what to expect? Do you want a mix of story types to adapt to audiences? Do you need a tool to standardise or support the analysis? This could be an Excel tool with inbuilt calculations such as a cost benefit analysis, or a Word document with specific questions to ask case study subjects.

Can it be used in multiple scenarios?

 Balance designing stories so they can be as widely appealing as possible, and used for multiple purposes, with being focused and not giving people too much information that is irrelevant to them. Case studies that you can pick sections out of for use in different settings - social media, presentations, funding applications, requests for donations etc. - are very useful.

6 Some different approaches to building case studies

Here we set out four ways of presenting case studies. As with the steps above, this is not an exhaustive selection of the options available, and you can combine them to best fit your needs.

6.1 A basic case study structure

Perhaps the most likely format to come to mind when we talk about 'case studies', is a piece of writing split into sections, that tells an individual's story, or highlights a particular aspect of an organisation's work.

Combining an individual story with secondary data from elsewhere can make it more powerful. The individual story is the more human side to the aggregate account of an issue. For example, secondary data on the economic and wellbeing costs of delays in immigration proceedings, combined with an account of one family's experience. There is no single template for a basic case study structure; although these two examples share some common features in terms of the content that might be included. These could then be presented in a visually appealing way, using a picture of the individual alongside it, or simply using branded colours, etc.

Example 1

- 1. **Introduction:** sets the scene, introduces the focus, the individuals and/or the work
- 2. **Challenge:** details the main problem or issue being covered
- 3. **Experience:** details the experience of the main issue; or the experience of working to address it
- 4. Benefit: includes any positive change that was supported or experienced
- Where are things now / what next: covers the implications for others and/or future work; any calls to action

Example 2

- 1. **Snapshot:** of the work and/or personal circumstances that are the focus
- Background information: description of the problem or challenge the person was facing / the work was trying to address
- 3. Action: what happened / the solutions that were implemented
- 4. Outcomes: what happened as a result of the action
- 5. **Challenges & lessons**: reflective practice, learning
- Looking ahead: what does this mean for the future and/ or what is the 'ask'?

6.2 Telling the story of a journey

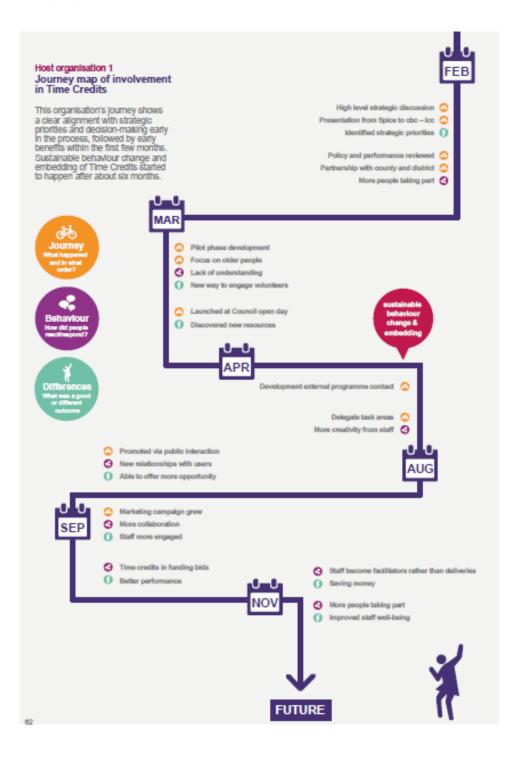
A useful way of helping readers to understand the impact a service has made can be to include a journey map. This may be the journey of a service user or client, or even another organisation as they interact with your service. It is typically represented visually and includes key points in time and what was happening. These do not always have to be points at which people connect with your service; they could include when something happens which shaped their need to interact with your service, or the outcome associated with support received.

A case study can include other information which sits alongside the journey map. For example, information highlighting how the interaction with the service had a positive influence; or making reference to external data which demonstrates what other positive benefits an outcome might be linked to.

Journey maps can take many forms, and are often created through a combination of existing data or focused research to find an example. They can be updated over time and can often use a similar structure to minimise the amount of work involved in creating multiple stories. A consistent structure for a journey map can also be helpful in extrapolating single stories, to suggest broader themes or patterns that they may be representative of.

The process of creating a journey map with a client can provide time for positive reflection for clients, to see how far they have come, and for service staff or volunteers to recognise what they have achieved through their hard work.

The image below provides an example of how a journey map can look.² At the end of this guide, you can also find the journey map we created with NELC as part of the wider project.



² Taken from Apteligen (2014), An Evaluation of Spice Time Credits

The case study above shows an organisations journey since their involvement in Tempo Time Credits. Tempo volunteers can earn Tempo Time Credits as for voluntary activities they do with registered organisations to support their local communities. These can be exchanged for a range of services and activities provided by partner organisations and can include health and wellbeing, educational, or arts and cultural activities. The journey map shows how at different points in time different impacts are experienced by the organisation. It helps demonstrate when organisations can expect to see impact, and the types of changes they might experience. By highlighting what is happening at each point, it also demonstrates some of the reasons why these impacts occur.

6.3 Multiple individual stories

Having a standard format for constructing individual stories is useful in three ways.

- 1. A standard format makes it easier to collect the data internally you know what to do with the information once you have it (incl. for example, verbal feedback etc.).
- 2. A standard format can be more effective as a communication tool people are more familiar with the communication after seeing it repeatedly, they understand what different parts of the format are telling them. It's user friendly.
- 3. If you have information in a standard format, you can aggregate it much more easily and to tell a powerful story that is about more than an individual but rather a story about a population, or group, or theme.

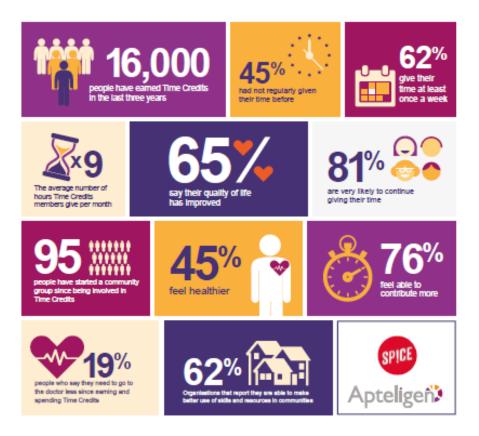
In this way, a case study can be an aggregation of stories on a particular theme, for example focusing on the costs and value perspective of the service you provide, and demonstrating how issues look at scale, beyond the detailed understanding provided through an individual case study.

6.4 Reporting outcomes and impact with strong visuals

One way to capture the attention of the audience, and create a case study that sticks with people, is to create strong visuals with your outcomes and impact data. The example below is a block of key statistics presented with icons, to satisfy those who respond best to numbers, and those who respond best to images.

It is increasingly common for icons to be used to draw attention to key statistics. Icons can be used in a variety of ways. One example is as a collection together, as on the image that follows, which was the front cover of an impact report for Tempo (previously known as Spice), a charity providing a volunteer reward scheme.³

³ Example taken from Apteligen (2014), An Evaluation of Spice Time Credits



Each of these blocks could be used separately, in the format as is shown above, or presented differently, as in the 'badges' below.⁴ This is useful for targeting audiences with the one or two data points that they are likely to be most interested in. These icons and 'badges', can be used flexibly, such as in email signatures or on presentations to help highlight specific aspects of your service. Some tips and tools for creating graphics can be found in Section 7.1.

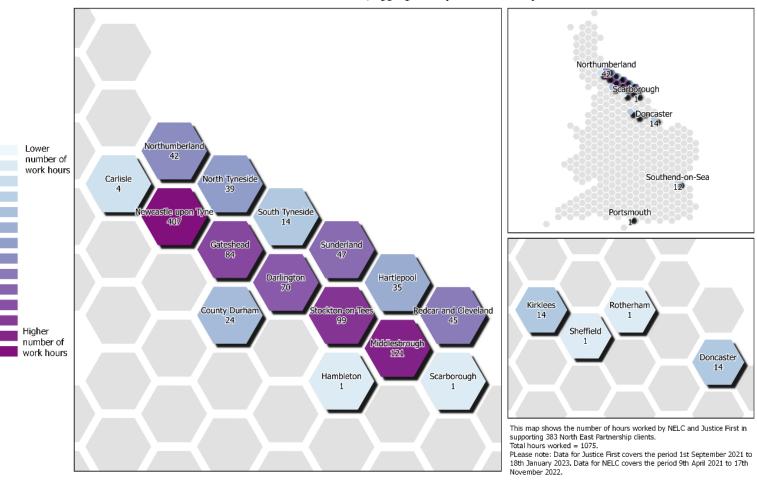
⁴ E.g. From Tempo (2020), Impact of Time Credits



6.5 **Presenting data on a map**

Lots of data contains a spatial/geographic element to it: postcodes, local authority names and boundaries, or ward names and boundaries. By presenting your data spatially, you can communicate the geographic reach of your work, or show comparisons between places or over time. People can often relate to maps in a way they don't with other visualisations; they can relate to a place or immediately understand the geography of an area, and may be more familiar with maps from their day to day life, compared with other ways data is presented.

In the map below, we have aggregated data on the postcodes where NELC and Justice First have delivered advice and support as part of the JTI funded North East Partnership. We have aggregated it to Local Authority level as this is a well understood geographic boundary and will be of interest to a range of partners and stakeholders. We have used equal hexagonal 'bins' to give each local authority area equal visual weighting. Maps are useful for reinforcing a point made elsewhere in a case study, or to provide information on the spatial impact or reach of your work. See Section 7.1 for some links to mapping tools.



Total work hours recorded on North East Partnership cases for the years 2021 and 2022 by NELC and Justice First combined, aggregated by Local Authority.

> The boundary file GB Local Authority Haxagon Cartogram by Ban Flanagan, ESRI UK, is licensed under a Creative Commons Attribution 4.0 International Licence.

7 Creating graphics

7.1 Some tips from our experience

Case studies can be developed using the free plans on online graphic design tools used to create infographics, data visualisations and reports. For this work we created the case studies using <u>Venngage</u>⁵, and have also used <u>Canva</u>⁶ for some graphics, although many other tools exist.

We only used the free plans for the online graphics tools for the case studies for NELC and Justice First.

⁵ https://venngage.com/

⁶ https://www.canva.com/en_gb/

All the tools available have merits and challenges associated with using the free versions. We have sometimes found that it is better to use a combination of tools to access the breadth of icons that we wanted, without having to commit to a paid subscription for one.

Although the use of the free versions creates some challenges and require some work arounds, a lot can be achieved and the free versions are likely to be adequate for your needs, if you are creating visual outputs infrequently, or using a similar structure for each one. More detail on how we created our own icons with the free tools can be found in the appendix in Section 9.

We have also used PowerPoint to create the case studies, by creating components in the online graphic tools and then bringing them together in PowerPoint. This can be easier as it allows a wider number of people to make tweaks to the case study when adapting it for a different audience, as you don't have to share a graphic design account, and more people are likely to be familiar with using PowerPoint.

We are not graphic designers or data visualisation experts, but through our work we have found some things to be helpful as we navigated the options and processes of online graphics tools, and we share our reflections with you here:

- We created our visuals from blank rather than using an existing template offered by online graphics tools. This gave us the flexibility to make things look exactly how we wanted them to. However, there are many templates available in the online tools which can be helpful in providing some inspiration and / or building blocks on which to start.
- In some of the online tools there is a limit to the number of documents you can create under the free plan. However, within each document, you can often add multiple pages which provides a lot of flexibility for trying different things, comparing options, or keeping lots of graphics together.
- The online graphics tools contain options for adding various types of images. We
 have mostly used fixed images ('icons' or 'elements'), but it is possible to create
 charts, images or word clouds which are based on data that you enter. You can
 also create images which include photos if this better fits with the style of your case
 study.
- For the case studies produced in this project, we generally used fairly basic icons which are largely outlines rather than the more detailed images with varied colours. This made it possible to get a more consistent look and feel to the case studies. However, there is no reason why you couldn't use a variety of different or more detailed, particularly if you only need a small selection, and you aren't trying to repeat a consistent look,
- It can be helpful to use icons from a variety of sources if you are struggling to locate something that best represents what your data is about. See the Appendix for the detailed steps.

7.2 Creating maps

A few tools for helping you to map your data:

- Superhighways have a good list of resources for mapping data. We'd recommend using Community Lens and AutoGeomapper for easily mapping postcode data and for creating interesting maps. <u>https://datawise.london/resources/our-round-up-of-geo-mapping-to/</u>
- There are more tools and blog posts referenced by the Data Collective https://data-collective.org.uk/resources/mapping-tools/

7.3 Inspiration on visuals

For inspiration with visualising your data, this compilation on Flickr of charity data visualisations is a good place to start: <u>https://www.flickr.com/photos/167769222@N02/</u>

For ideas for ways of presenting data see: https://datavizproject.com/

8 Other guidance on telling stories with data

We have not been able to find examples of guidance that specifically focus in detail on how to combine different types of data in a case study. But there are many good sources of practical advice on how to write a good case study, and how to produce effective data visualisations, which are helpful in combination.

NPC's resources on visualising data include a downloadable resource with lots of examples, including where organisations have combined numbers and stories. Scroll to the bottom of the article to find the additional links:

https://www.thinknpc.org/resource-hub/the-cycle-of-good-impact-practice-visualiseyour-data/

For considering how to turn a case study into a compelling narrative, we'd recommend exploring the Storytelling with Data blog and books: https://www.storytellingwithdata.com/blog/2020/5/21/the-structures-of-story

Some short, practical articles on how to write engaging case studies: https://www.dsc.org.uk/content/writing-engaging-charity-case-studies-the-basics/ https://charitydigital.org.uk/topics/topics/how-to-write-impactful-case-studies-10033 https://www.thirdsector.co.uk/sarah-dillingham-essential-tips-creating-great-casestudies/communications/article/1412829

9 Creating icons

This appendix gives some practical tips showing we have created icons without the need to subscribe to illustration or graphics software. We produced this to enable organisations to recreate and build on the case studies we created.

You can download icons from both Canva and Venngage and add them both to a single PowerPoint to edit them into a single story, by following these steps.

 If the exact icon you are looking for does not exist, it can be possible to create your own hybrid. For example, on a journey map you may wish to use a calendar icon with different years on it. To create this if the year required is not available, you can begin with a calendar icon which has a date showing, but does not have the option to edit the date (number) included as shown below.



A white box can then be created and laid over the number, to hide it.



The year, or desired date, can then be added over the top using a text box.

-0-0-	
2016	

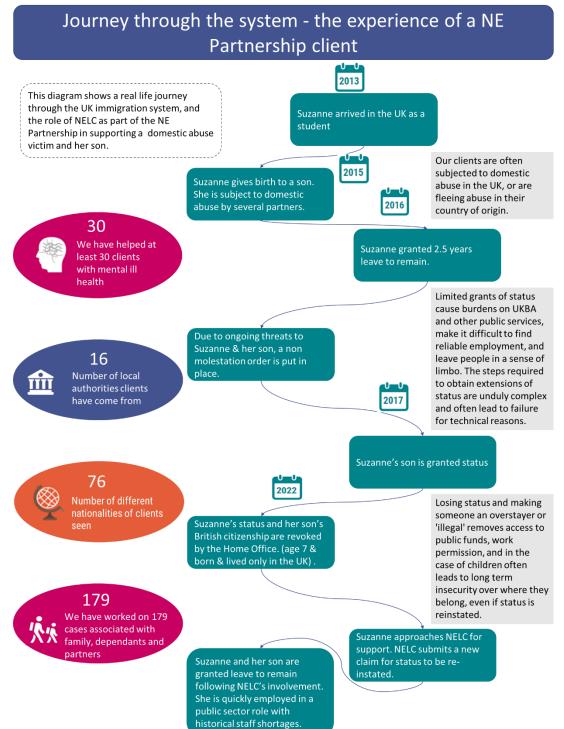
It may be necessary to change the font size to make it fit.

- When exporting from the online tool, we typically use OneNote to select a section to copy which can then be pasted elsewhere, although other screen shot software can work. You need a paid account to download from Venngage, and from Canva you can download, but still need to edit the image elsewhere so we have stuck with the screen copying approach. The quality of the image is typically not good enough to be able to expand it a lot but is good enough when being used as relatively a small icon. Try to keep a small boarder area around the image you are using to make it easier to use in the export, rather than having a large white boarder.
- If you know you are pasting your icon on a background other than white, before you
 export it, create a coloured shape behind your image so you have a boarder colour
 the same as the background you are pasting it to.
- There is a trade-off between the ease of editing in PowerPoint, such as it being
 easier if you need to tweak small details like updating a headline number in
 PowerPoint, but the online tools offer more design flexibility. It is personal /
 organisational preference as to what works best. For instance, it might be easier to
 do most of the editing in PowerPoint, to allow storage of case studies in a single
 document, easily accessible by more users.

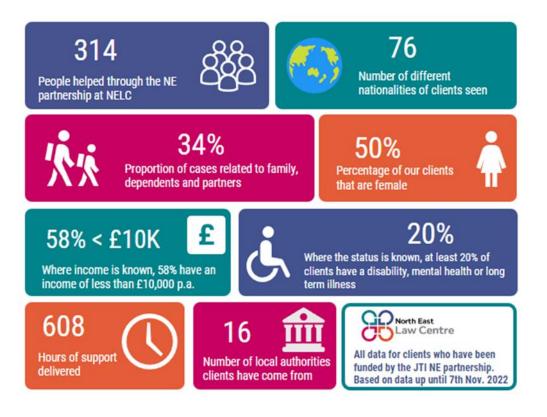
10 Case study Examples

10.1 NELC Journey Map and statistics box

The image below shows a journey map case study for the North East Law Centre. The case study shows an anonymised story of a client and gives some context to why it matters, whole service data to help illustrate how this story fits into the wider context of the organisation. It could be used to help funders or potential funders to understand the value the organisation makes. It can sit alongside quantitative data to help appeal to both heads and hearts.



The statistics box below gives the quantative part of the story of the organisation. It demonstrates the scale of activity, the profile of clients, and the challenges faced. The data and images within any of the boxes can be modified according to the audience.



10.2 Justice First short profiles, statistics box, map and

One of the requirements for Justice First was to be able to produce case studies that enabled the public to understand what they do and why it matters. The short profiles with an overall introduction to Justice First help to achieve this. The case study has been designed so it can be flexed so that sections can be changed based on the audience. The case study shares

> Justice Together North East Partnership is a regional partnership project, creating a Specialist Immigration Advice Hub across the North East and is funded by Justice Together.

What we do

As part of the North East Partnership, we provide specialist legal advice to clients who do not have access to legal aid and refer people on to other specialist support services.

Our cases help to reunite families, get individuals get the status they need to enable them to work and contribute to the economy. This support contributes to peoples' mental health and potentially reduces pressure on public services.

Rose's story

Rose and her son are from an African country and have refugee status. When no other support was available, Justice First supported Rose in successfully applying for indefinite leave to remain for her and her son and in obtaining their biometric residence permits. This means Rose and her son can continue their lives without disruption. The family have secured more stability in their status in the UK and will be able to apply for Citizenship soon. We were able to secure recourse to public funds for Rose and her son which provides for further financial stability, particularly in light of the current cost of living crisis.

Ali's story

Ali and his family fled Iraq in due to threats to their lives following political involvement. Ali's initial asylum claim was rejected. Justice First are supporting Ali and his family in applying for Leave to Remain in the UK under the Refugee Convention and the European Convention on Human Rights. This means that we believe the UK Government had a duty to provide safety to Ali as he is at risk of persecution in Iraq. Justice First supported the family in accessing local mental health services due to Ali's history of persecutory treatment and the ongoing stress that being within the asylum system was causing the family.

We support those in need of legal advice and help people to re-engage with the Home Office. When people have lost legal representation and have nowhere else to turn, we step in where we can, to help them find a way forward. We help people out of destitution, uncertainty, and legal limbo by using our specialist legal knowledge of asylum and immigration law to give meaningful, free and honest advice and support to those who use our service.

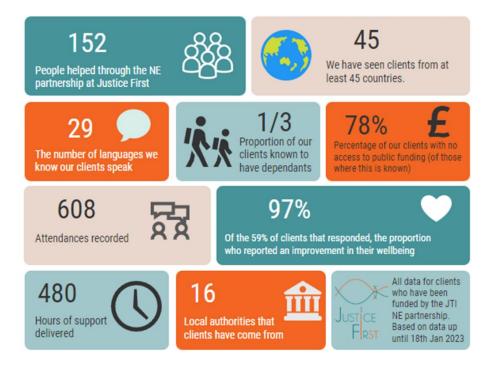


Between 1st September 2021 and 18th January 2023 we have supported 152 people.

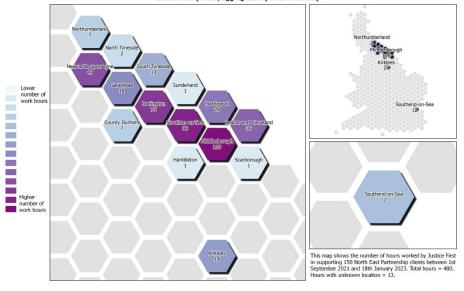
A third of our clients have dependants and over three quarters have no recourse to public funds.

A study in the British Journal of Psychiatry found nearly half of refugee children surveyed in London had a diagnosable mental health disorder, with depression, anxiety, and post-traumatic stress disorder (PTSD) the most common.





Justice First 'Hours worked' on North East Partnership cases between 1st September 2021 and 18th January 2023, aggregated by Local Authority.



The boundary file GB Local Authority Hesagon Cartogram by Ben Flanagan, ESRI UK, is lionsed under a Creative Commons Attribution 4.0 International Lionnes.



Of the people we work with for whom we have data, 78% (nearly 8 out of 10 of them) have no access to public funding, the mainstream benefits citizens are entitled to (for example Universal Credit, Housing Benefit, Disability Living Allowance, State Pension, Child Benefit and so on).



People without accommodation are allocated somewhere to sleep, usually in a hotel or hostel. People can be moved with very little notice, to new town or city, sometimes at the other end of the country, disrupting children's schooling, access to medical care through a GP and any relationships they may have.

A small amount of money is provided on a card, £45 per week per person, that can only be used in specific shops, and cannot be used on buses, for example. The weekly income threshold, after housing, for a single working age person in the UK to be considered on the poverty line was £141. The threshold for destitution was £70. These figures are from 2020, before the cost of living crisis.1

People who are seeking asylum are very rarely granted permission to work, and only for jobs on the shortage occupation list, which is mostly restricted to highly skilled jobs that require formal gualifications.

We know from the Royal College of Psychiatrists 2, the Mental Health Foundation 3 and other sources, that this uncertainty around housing, finances and employment, and difficulties during the process of seeking asylum, potentially exacerbate migration experiences such as experiencing conflict, violence, danger, exploitation and separation from family, increasing vulnerability to mental health problems.

Research suggests that asylum seekers are five times more likely to have mental health needs than the general population, and more than 61% will experience severe mental distress.4 In addition to the distress and harm that this causes to individuals, it also has an impact on peoples' ability to settle and integrate into life in the UK.

This process of restricted, heavily controlled asylum support, continues to cause problems even after people have successful claims for Leave to Remain, and are able to access mainstream benefits.

The transition from asylum support to mainstream benefits, can happen very suddenly, from having circumstances tightly controlled and administered, by being told where to live, with no choice or control over finances, to being completely responsible and without support. For example people have 28 days to find their own accommodation, set up their benefits and utilities etc. In a new country, often with mental health needs and with no savings to provide a rental deposit for example, due to having been unable to work prior to this point.

We therefore support those in need of legal advice and help people to re-engage with the Home Office. When people have lost legal representation and have nowhere else to turn, we step in where we can, to help them find a way forward. We help people out of destitution, uncertainty, and legal limbo by using our specialist legal knowledge of asylum and immigration law to give meaningful, free and honest advice and support to those who use our service.

References:

1 Data source: Poverty thresholds are from Households Below Average Income 2019/20, Department for Work and Pensions. Minimum Income Standard thresholds are based on the Minimum Income Standard (MIS) for London, Trust for London 2020. Destitution in the UK 2020, JRF via <u>https://www.trustforlondon.org.uk/data/poverty-thresholds/</u> 2 https://www.rcpsych.ac.uk/international/humanitarian-resources/asylum-seeker-and-refugee-mental-health

- 3 https://www.mentalhealth.org.uk/explore-mental-health/statistics/refugees-asylum-seekers-statistics

4 Eaton, V., Ward, C., Wornack, J., & Taylor, A. (2011). Mental Health and Wellbeing in Leeds: An Assessment of Need in the Adult Population. NHS Leeds via https://www.mentalhealth.org.uk/explore-mental-health/statistics/refugees-asylum-seekers-statistics

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