Data in the not for profit immigration legal advice & support sector

Learning from a Justice Together Initiative, Justice Lab and North East Partnership initiative

March 2023

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1 To this project

This is a joint project between the Justice Together Initiative (JTI) and the Justice Lab. The project was commissioned to provide data practitioner support to the North East Law Centre 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 support was to improve their Data Maturity[1] by supporting the partnership to better understand the data they collect about client profiles, engagements and referral pathways.

The original focus of this project was on:

1. Nurturing the technical intuition and / or analytical capability of staff in the NE partnership organisations, who have a remit of data within their organisation. The purpose being to expand the technical and reasoning skills of data leads and increase the purposeful collection and use of data, including from easier data sharing between organisations in the NE partnership.
2. Exploring what is already possible with regard to shared data standards for understanding client profiles, client engagement with services, the types of services which are provided and referred to, and to reveal challenges for developing data standards.
3. Developing guidance for legal advice and support organisations to develop compelling case studies and stories which draw upon quantitative and qualitative data.

The outputs and lessons developed from this work will be shared across the JTI, and to the wider legal advice sector, to support similar organisations with their data journeys.

Throughout the project JTI and Justice Lab were very supportive of how the process would need to evolve to respond to the needs of the different organisations, and be sensitive to the realities of the contexts they are working in. We were all aware that this kind of data support work is relatively new in general, and especially in the not for profit immigration legal advice and support sector.

As expected, the original plan of work had to be adapted to reflect both the learning gained as the work progressed and the needs of the organisations involved. In order to more clearly reflect what we were doing, we began describing the focus of the work as:

1. Improving data maturity by understanding where organisations are in relation to data use, individually and as a partnership and as far as possible progress them on their data journeys. This was to include building an understanding of the blocks to this, and as a minimum not losing their engagement and motivation around doing more with their data, but ideally building their appetite and confidence to do more.
2. Through our work with the individual organisations, develop data informed insights on how the NE Partnership is working.
3. Support the individual organisations to develop 'case studies', with a particular focus on combining qualitative and quantitative data.
4. Engaging in regular reflective practice and document all learning, to inform how future work by the Data Lab and others, can support better use of data in the not for profits sector.

[1] Data Maturity as defined by Data Orchard i.e., an improvement across data leadership; skills; culture; uses; tools; and analysis.

There is no ‘off the shelf’ process for supporting these organisations with their data journeys as this is still a relatively new concept. We are all finding our way to the best approach, learning through doing, and documenting what we learn as we go.

2 To the organisations involved

A wide range of organisations have been involved in this project. We introduce each of them briefly here and more detailed information can be found on their websites.

2.1 Justice Together Initiative (JTI)

The Justice Together Initiative is a unique collaboration of thirteen (and growing) independent funders launched in 2020. The overall vision of the initiative is that people who use the immigration system can access justice fairly and equally, so that they can get on with their lives.

Over the next five years, more than £10 million of new funding has been committed by the following founding funders, with others likely to join: Paul Hamlyn Foundation, AB Charitable Trust, Barrow Cadbury Trust, Comic Relief, Joseph Rowntree Charitable Trust, Unbound Philanthropy, Oak Foundation, Metropolitan Migration Foundation, Baring Foundation, The Legal Education Foundation, Trust for London and Tudor Trust.

The initiative responds to the challenges facing the legal advice sector, and evidence that people in communities around the UK are struggling to access justice. The goals the Initiative seeks to achieve are:

- A fair, timely and accessible immigration system
- A more sustainably resourced immigration advice and legal system
- A more accessible, sustainable, collaborative, and co-ordinated sector to strengthen and increase access to immigration advice and legal provision.

The Initiative funds legal advice and representation and local and national influencing on access to justice related to immigration. JTI is the lead commissioner of this programme of work.

https://justice-together.org.uk/

2.2 Justice Lab

Justice Lab was a special initiative of the Legal Education Foundation which used data and evidence to tackle the most pressing problems facing the justice system. Justice Lab has now ceased operating, however resources are still accessible on the website.

https://justicelab.org.uk

2.3 North East Partnership (NE Partnership)

North East Law Centre (NELC), covers the North East

The North East Law Centre (NELC) is an independent, not-for-profit organisation that provides specialist legal advice in the following areas: family, education, immigration, discrimination and employment. It provides both free and paid services, to those living and working across the North East. The highly skilled team includes solicitors, legal advisers, caseworkers, office and project support.

NELC was provided a three-year grant under the JTI advice and representation programme and is the lead grant partner for the collaboration of three other organisations.

North of England Refugee Service (NERS), covers the North East

The North of England Refugee Service was established in 1989. An independent and charitable organisation which exists to meet the needs and promote the interests of asylum seekers and refugees who have arrived or have settled in the North of England.

https://refugee.org.uk/

Justice First, covers Teesside

Justice First was set up in 2006 in response to a lack of specialist legal advice and support for asylum seekers and refugees arriving in the Tees Valley. The core purpose of Justice First remains to respond to the needs of people in the Tees Valley who are seeking asylum in the UK but have had their initial application rejected.

https://justicefirst.org.uk/

Action Foundation, covers Tyne & Wear *(not involved in this data project)*

https://actionfoundation.org.uk/

The partnership also works with at least nine other organisations across the north east. [2]

The aim of the grant partnership is to create a Specialist Immigration Advice Hub that will increase access to advice for clients throughout the North East in three identified areas of Immigration advice. The aim of the hub model is to build a partnership between expert legal organisations and civil society organisations, to provide consistent, quality assured and holistic support to migrants throughout the North East. The partnership received the first grant payment in October 2021.

2.4 Apteligen (appointed data practitioners)

Apteligen has a long track record of supporting organisations with their data journeys. Data is an important part in the design of new ways of working, measuring outcomes, and for telling compelling and robust stories. We push boundaries and create new insights, but most of all we are pragmatic, and we work in genuine partnership with our clients.

The team for this project includes:

- Sam Mackay (Director and co-founder of Apteligen): Project Manager and principal analyst
- Kerry McCarthy (Apteligen Associate): Facilitator and learning lead
- James Bowles (Consultant at Apteligen): Analyst and project support

[2] These organisations are not included within the scope of work, but are part of the NE partnership. Friends of Drop-in (FODI), based in Sunderland; International Community Organisation of Sunderland (ICOS), Based in Sunderland; Angelou Centre, covers the North East; The Red Cross, covers the North East (Referral only); Open Door North East, covers Teesside & Durham; Freedom from Torture, covers the North East (Referral only); The Children's Society, covers the North East (Referral only); Rainbow Home, covers the North East; West End Refugee Service, covers Newcastle.

http://www.apteligen.co.uk/
https://www.linkedin.com/in/kerrymcc/

3 To this learning report

3.1 Who is this report for?

As noted above, one of the key objectives of this work was to provide learning. This report has useful learning for:

- **The not-for-profit sector**, in particular smaller organisations who are at an earlier stage of their data journey and who have more limited capacity for data work, and organisations working in the immigration legal advice and support sector;
- **Funders** looking to build the data capacity and capability of the not-for-profit sector; and
- Other **data practitioners** working in and with the not-for-profit sector.

We hope this report, along with other outputs from the project[3], will help not-for-profit organisations in a number of ways. First, to feel inspired and encouraged to begin working on their own data journeys, and feel confident that it is possible to adapt and evolve work in a way that takes account of their individual contexts and constraints. Also to build motivation and momentum to collect and use data to support day to day work, and help to communicate about the very important difference that their work makes. Furthermore, we hope it helps with scoping the work organisations may want support with, when looking to appoint data practitioners.

It was very clear through this project that organisations cannot progress their data journeys without more support. To that end, we hope this report helps make the case for increased funding to support organisations with their data journeys, and helps funders understand the kind of support needed and how to plan that support effectively.

This project is not alone in trying to support and build momentum for better use of data throughout this sector, with other data practitioners undertaking similar work. Through our honest reflections in this report we hope to contribute to the growing body of learning about how to do this work well, so we can all continue to learn and improve.

3.2 What this report is not

This report does not contain any of the data from the individual organisations, or about the NE Partnership. It is not an evaluation or assessment of data practice by NERS, Justice First or NELC. Instead it is a description of the process we collectively went through during this project, our reflections on that process and what might be useful to consider in future work to support organisations with their data journeys. It is not systematic research about data practice, nor a statement on 'best' or recommended practice.

It is also important to note that this report reflects our experience as the Apteligen data practitioner team. While our learning was obviously influenced by what we heard from the organisations while we were working

[3] See for example '*Using Data to Tell Your Story: A short guide & examples from the NE partnership with North East Law Centre and Justice First*'

with them, this is not the same as a specific piece of research or structured feedback, from their perspective, on their experience of the process, which was beyond the scope of this work.

3.3 What this report contains

In the following sections we describe the work that took place during the four work phases of the project, including the adaptations we had to make to the original plan, as well as details of how we overcame different dilemmas and what we learnt about doing things differently next time.

In the final section of the report we have restructured this learning according to what we think is most interesting and relevant to not for profit organisations, funders and other data practitioners

3.4 Terms we use in this report

Data Maturity: Within the proposal for this project, Justice Lab wanted to support the sector to build its capacity and capabilities around data. Data Orchard's Data Maturity[4] framework is what Justice Lab uses to describe the components that an organisation will typically need to review when looking to increase their capacity and capabilities.

Data Journey: In our work we often describe the route towards greater data maturity as a 'data journey'. In this report we use both terms – 'data maturity' and 'data journey' - somewhat interchangeably to refer to the general idea of an organisation developing their data practice. When we are referring to specific tools or processes that relate to Data Orchard's framework, we always use the term 'Data Maturity', and reference their work.

Data Practitioner: In this report we use this term to refer to individuals or consultancies involved in supporting other organisations with their data journeys, and because of the nature of this project, we are generally referring to support that is external to the organisation. However, we want to recognise that anyone working with data is a 'data practitioner', and that many organisations have dedicated data practitioners supporting them from within.

Organisations: We refer to NELC, NERS and Justice First as 'organisations'.

[4] Data Orchard '*Data maturity framework for the not-for-profit sector'* Version 2.1 © Data Orchard CIC January 2022

We can define data as being a representation of the world which when interpreted and understood in context, becomes information. Data may be qualitative (based on description and typically text based), or quantitative (based on measurement and typically numerical). In legal advice settings, quantitative data may include information on the number of clients seen over a certain period, the most frequent types of advice issued, or the time spent with a client. Qualitative data may include case notes outlining a client's current position, the outcome of an assessed claim, or a quote from a client describing the impact of the advice and support provided.

Data is important for the work of legal advice organisations. It can provide the necessary evidence base for organisations to ensure they are providing appropriate services and are able to advocate for wider legal and policy changes. We recognise the significant resource and capacity constraints experienced by legal advice organisations, but believe that it is worth advocating for greater investment, time and resources to support them to develop organisational data capabilities and embark on 'data journeys'.

From working with legal advice organisations, both in this project and more broadly, we can see that accurate data and intelligible and actionable data insights are necessary for the following purposes:

Casework: Legal advice organisations principally exist to advise clients on their legal rights and provide guidance on specific areas of law, represent them in legal proceedings, and pass them on to appropriate support agencies. This casework requires: accurate information to be inputted; for the caseworker to be able to see the right type and depth of information about the client to know how to support them; and to be able to share accurate and useful data and information with legal representatives and other support agencies.

Adapting their own services: Collecting data such as the profile of people who require support and enquire about the services offered, the legal issues that people present with, and the services that they require, can help advice organisations adapt their work to try and resource the services which are experiencing the most demand. In addition, capturing data on the time spent advising clients, client-reported outcomes, and the resolution of cases provides important service-insight into the overall success and resources expended on each case. Data is also central to any efforts to evaluate services.

Funding services: Accurate and useful data on information such as the profile of people supported, individual and aggregate case outcomes, and the extent of unmet demand are all insights that are required by funding bodies, both in reporting on currently funded services and in order to make the case for why future or additional services should receive support. Having data that is easily accessible and tells a compelling story is an important factor in reducing the burden on staff when applying for new funding and reporting on existing funding arrangements.

Campaigning for wider change: Legal advice organisations receive an important first-hand insight into the challenges of the system in which they work. For organisations in the access to justice sector can advocate for the collective needs of the clients they see, demonstrate the scale of demand on their services and the types of services sought, and failings in the system that could be rectified. This broader advocacy and campaigns work requires sound data and evidence (both qualitative and quantitative) that positions the organisations as experts in their field.

Showing a bigger picture: Finally, the data collected by legal advice organisations is necessary to inform research and campaigns which seek to explore geographic gaps in legal advice provision[5] and the broader

[5] https://www.refugee-action.org.uk/no-access-to-justice-how-legal-advice-deserts-fail-refugees-migrants-and-our-communities/

composition of the sector[6]. This is important for both understanding where gaps in provision exist and the regional and national scale of advice required.

Ultimately, if you are spending time collecting data, you need to make sure you can do something with it, and that you are collecting the right information.

[6] https://www.threesixtygiving.org/data/reports-publications-and-analysis/data-legaladvice/

Overview of the process

The table below provides an overview of the process, and as with the more detailed descriptions of each work phase that follows, it is structured according to what actually happened in practice, rather than what was originally planned based on the tender documents and our bid. This reflects the reality of the journey through the work and shows how our learning evolved alongside the process.

Again, it is important for us to emphasise that, just as with the rest of this report, ***what we are presenting here is not a guide to a recommended or 'best' process.*** This is a contribution to learning about how to support organisations' data journeys, based on our practice experience.

Phase 1: Building relationships, understanding & commitment **July - mid Sept 2022**	• Understand the wider NE Partnership project. • Confirm a shared understanding of the purpose and value of the project, including expectations about everyone's roles. • Develop positive working relationships with the three organisations; in particular with the nominated 'data lead' at each. • Begin the process of accessing & understanding each organisation's data.
Phase 2: Confirm project (re)design & first activities **Mid Sept – early Nov**	• Confirm the programme of work, based on a better understanding of the individual organisations. • Introduce the idea of a 'data journey' & attempt a more formal assessment of organisations' Data Maturity. • Introduce different types of 'case study', and explore what would be useful to each organisation. • Continue to work towards accessing data. • Build understanding of how data flows within and between organisations.
Phase 3: Data analysis, planning and a pause **Early Nov & Christmas Break**	• Analyse data, including communication with organisations to help with understanding and interpretation. • Following personnel changes, build new relationships and plan together how to progress in the new year. • Plan methods for sharing learning from the project.
Phase 4: Final push – meetings, analysis, insights pack & case studies **Jan and Mid-March 2023**	• Produce useful outputs for each organisation – Data Insights Pack and case studies. • Finalise this 'Learning Report' & 'Using Data to Tell Your Story A short guide & examples from the NE partnership with North East Law Centre and Justice First' • Design process for service user involvement, and final efforts to recruit (unsuccessful). • Confirm dates & processes for sharing learning from the project more widely. • Design a session to bring Justice First and NELC together, as the end to this project. • Final meeting with the project funders.

1 Introduction

In this section we describe each phase of work in more detail, including:

- A table comparing the original plans from the tender documents, the revised plan for each phase (if there was one), and what actually happened in practice.
- A summary of the dilemmas we encountered during each phase of work, and how we moved forward.
- The main learning points from each phase of work.
- Resources & tools we found useful.

As always, ***we are not making recommendations for a prescriptive process of how to work with organisations when supporting their data journeys***. This report is a summary of the process we went through, and our reflective practice and learning about that process which we hope can contribute to the ongoing development of data practice in the not for profits immigration legal advice & support sector and beyond.

2 Phase 1: Building relationships, understanding & commitment

Original Plan **(expected June – Sept)**	**What Happened in Practice** **(between July & mid Sept 2022)**

Design and commitment:
• Inception meeting with funders
• Draft project specification
 	
Developing the project brief:
• Document review
• Local support - project plan for each organisation
• Supporting presentation of the project plans
• Learning day with all 3 organisations – including Data Maturity assessment
• Reflection document
	• Attended Spotlight & Steering Group meetings (to introduce ourselves and develop our general understanding about the NE partnership)
	• One introductory conversation with each organisation (introducing the work, who to involve, routes to accessing to data, relationship building)
	• More in depth conversations with 2 of the 3 organisations we are working with (re - what would be useful with data, some initial understanding of their data processes)
	• Requested documents (very few, no formal review needed)
	• Requested NE Partnership data from both organisations. For one we only had very superficial access from 31st August, and were not able to identify NE Partnership clients until 20th December. For the other we had limited access to data from 14th October, and were only able to identify NE Partnership clients from 7th November.
	• Requested access to baseline JTI partnership data
	• Learning Day with 2 of the 3 partnership organisations, covering:
	  ○ Recap on overall purpose of the project
	  ○ What does 'purposeful collection & use of data' mean to each organisation
	  ○ Review ways the partnership impact data could be useful to organisations
	  ○ Introduce concept of Data Maturity & the Data Orchard assessment tool[7] & agreed completion date for 23rd Sept, with our support available if needed.
	  ○ Introduce the data audit & flow work
	  ○ Build commitment to next stage of work
	• A progress meeting with funders, incl. documenting reflections & learning to date.

[7] Data Orchard's Data Maturity Self- Assessment Tool https://www.dataorchard.org.uk/data-maturity-assessment-tool

2.1 Dilemmas and ways forward

There was no **widespread understanding about the focus, purpose and value of the project.** We spent time with the organisations to develop this, and to understand who we needed to connect with at each organisation, in particular individuals with responsibility for accessing data, managing data systems, data reporting and data entry who could act as the 'data lead' for the organisation.

It quickly became apparent that we **needed a specific one-to-one approach** with each individual organisation, rather than a single process for them as the NE Partnership. From the beginning we had to progress the project with only two of the three organisations, and be ready to respond when the third organisation was able to engage with the project (dependent on recruitment to a key post related to the NE Partnership).

In one of the organisations the 'data lead' left towards the end of this phase of work. And in the other, the data lead had very limited capacity. Neither of these individuals were purely responsible for data and had many other responsibilities within the organisation.

The three organisations were very **different in their capacity for data work**, and overall capacity in general. For example, the first learning day involved eight staff, all with different roles, from one organisation, with only one person representing the much smaller, second organisation.
While individuals were concerned about how to improve data about the NE Partnership, in general the organisational focus was on how data could be improved to be useful to their work, rather than to improve data about the NE Partnership.

Related to the capacity issue, **timeframes for progressing the project** were necessarily going to be dictated by the availability of people who are already very stretched in their day to day roles. It would have been unfair and unworkable to try and impose a pre-determined project timeline that had not been factored into their work schedules ahead of time. People recognised that data is important, but it is hard to make it a priority over the primary focus on supporting clients. In response we accepted there would be a lack of certainty about when things might happen, and that key meetings might be much later than we originally anticipated. Good communication and understanding from JTI and Justice Lab, made this less stressful for all.

A clear tension from the beginning of the project was **providing capacity *to do things for* organisations (to enable their meaningful engagement with the project)**, when the original intention was for *us to support* organisations to develop their internal capacity and capabilities. From the outset we felt we had to face the reality of what we could realistically expect the organisations to do themselves, and focus instead on the overarching aim of maintaining engagement and enthusiasm for developing their data journeys, at whatever pace was feasible.

For example, the original brief had assumed that individual organisations, with some support from us, would develop 'data plans' for understanding their data processes for measuring client needs, engagement and service provision and share them at a learning day. The organisations did not have the capacity to do this, and we felt that pushing this course of action was an unrealistic burden and risked what had been their positive engagement with the project as a whole. Instead we planned individual sessions with the two organisations we were working with, where we mapped how data flowed in and out of their organisation, allowing us to develop a better understanding of what data was being collected and through what processes. We were encouraged by the fact that when space was made for organisational team meetings, there was very good staff engagement.

2.2 Learning from this phase

- This kind of work needs to **take account of the time needed** to: build mutual understanding about the focus of the work; the starting point of individual organisations; and to build trusting relationships.

- It would be worth **investing in a 'pre-project' stage** before the external data practitioner is working directly with organisations. The purpose of this stage is to *develop clear understanding for all people likely to be involved from the participating organisations* with the aim of using the funded practitioner support efficiently. This would therefore seek to define and be clear on:
    - The purpose of the work
    - The resources involved
    - The need to set up access to data by a specific date
    - Peoples' time / availability to take part, and shaping project timelines to fit this.

  Clarity on these areas is *essential if the project needs to run to at a specific pace to a pre-determined timetable.* And they are likely to be easier to negotiate between parties with existing relationships, than by the contracted data practitioners.

  Prior to, or concurrently to the commissioning process for external support, it might be helpful for the funder and participating organisations to *prepare a 'terms of engagement' document,* detailing the respective roles and responsibilities of organisations, and individuals within organisations, time commitments, and specific processes for data access detailed.

- **Alternatively, data practitioners can work to the pace set by participating organisations**. This has the advantage of less commitment / burden for those organisations, giving them more autonomy but has implications for how quickly the work can progress, the ability to set a timetable for the work, and means the pace of participating organisations may be very varied.

- When working with a partnership that shares data**, be explicit about the role of each organisation in relation to data.** For example, what data does each organisation collect, who manages the data for the whole group, what data in what format can each organisation access, and what permissions, if any, do they need to do this? It would be useful to understand whether these data processes were designed for a specific reason, or if it evolved through, for example, pre-existing relationships, dynamics, or working practices?

- Before planning a schedule for joint working on the development of data maturity for a partnership or collective of organisations, it is essential to **understand where each *individual organisation* in the group is on their data journey**, and the capacity they can realistically bring to the project.

- Have a number of days of **capacity at the start of the project which is just focused on exploring and analysing data,** so there is something tangible to work with, and as a way of providing a simple output that shows how data is directly useful to organisations at the very start of the process. This may be helpful to quickly building broad engagement, by demonstrating the value of a data journey in a very practical way. It is also an efficient way for data practitioners to build understanding about an organisation's data.

- **At each phase of the project, it is helpful to provide a clear 'hook' to support engagement.** This means providing examples of benefits from spending time on a particular activity that are more immediate than the general benefit of contributing to an organisation's data journey. This helps to demonstrate why this phase of the project worth someone's time.

- It would be helpful to be able to **signal very clearly from the beginning what comes next**? For example, where can organisations look for ongoing support with their data journeys? Even if Data Maturity progresses in some areas - for example in how data is used, culture or leadership - some very fundamental capacity issues may remain. What are the implications of revealing the potential of data, and extent of the data journey ahead of them, to organisations already overstretched with current work, and without a clear plan for support over the longer term?

2.3 Resources & tools we used

- Data Orchard Survey
- Data Orchard Data Maturity Assessment (free version)
- Relevant examples of how data has been used to good effect
- Zoom – all meetings took place online

3 Phase 2: Confirm project (re)design & first activities

Original Plan (expected Sep - Oct)	**Revised plan (agreed mid Sept)**	**What Happened In Practice (between mid Sept & early Nov 2022)**

Mapping client and service pathways:
• Data audit template creation and completion support
• Visual schematic of data collection points
• Descriptive analysis of client data – data pack
• Learning day
• Synopsis – building on reflective document
	At the end of Phase 1 we revised the original plan and agreed with organisations & funders to:
	With Justice First & NELC:
	• Complete Data Orchard's Data Maturity Self-assessment Tool
	• Run a session on data flows with each organisation
	• Access data from both organisations, & a first review of what it looks like to work with
	• Plan some potential analysis, informed by our 'long list' of what they are saying would be useful combined with what we think is possible with the data at this stage
	• Plan the approach to data audit
	• Run a workshop with each organisation that involves the wider organisation, not just the data 'leads'
	• Reflect on where things are after these workshops & propose next steps
	With NERS:
	• Stay up to date on any changes ready for their involvement when the time is right.
		Justice First
		• Requested Data Orchard's Data Maturity Self-assessment & offered support, but no response
		• Data flow session with one member of the team, the designated 'data lead'.
		• We had limited access to data from 31st August (only access to the reports / summary data. However, at this stage no system and contextual information was available to help interpret the data was provided. As we also did not have sufficient levels of user access to allow us to properly explore the data, it was of limited use).
		• At this stage very low transparency in the data we had access to e.g. very complicated to get exact numbers from a report; no parameters (e.g. timeframe) for data in a report. So it was unclear exactly what the data is telling us about.
		• Unable to secure an organisation wide workshop session, only contact with the data lead.
		NELC
		• Data Maturity Self-assessment completed by two members of the team
		• Data flow session with two members of the team.
		• We had limited access to data from 14th October (able to identify NE Partnership clients from 7th November). Opposite issue to Justice First, only able to access raw data, unable to run reports; we had details on JTI clients (i.e. postcodes, age, details about them as individuals, but not their case) and no way to query the data systematically, i.e. by case type or time frame
		• Well attended, organisation wide workshop on 20th October, with high level of participation by all:
		    ○ **Content:** introduced project; feedback & discussion on the data flow; telling stories with data / case studies; introduced idea of Data Maturity & data journey.
		    ○ **Purpose:** learn more about their data; understand what they are looking for from 'case studies'; build engagement & understanding of wider organisation re data maturity & data journey (incl. beyond the timeframe of this project); inform next stage of project.

3.1 Dilemmas and ways forward

For various reasons (including personnel issues, systems being able to grant us access to only the relevant data for this project and so on) it was **slow to access data** from both of the organisations we were working with, taking 5 -6 months.

For Justice First, we had superficial access to their data from 31st August. While we could login and run reports, it was not until much later in the project, the end of December, that we were able to identify which were NE Partnership clients and access the contextual understanding and expertise of the organisation. NELC also had to work with us and Advice Pro to try and secure us access to the relevant parts of their data, and this took until early November.

Progressing access to data took ongoing commitment from everyone involved, and needs to be recognised as an ongoing, iterative process.

During this phase we were only actively working with one of the three organisations. They had evident interest and motivation for doing more with data, ideas about what would be good to do and the challenges to overcome, although **some of their ambition was beyond the scope and resources of this project, and would need ongoing capacity for the longer term**. Our focus was on doing what we could to maintain motivation, by showing what might be possible with limited capacity and how that could directly benefit the organisation.

We explicitly recognised the **tension between the project's original aim to develop the internal capacity and capabilities of the organisations, and organisations not having the capacity to do much data work.** Faced with this reality, we interpreted '*supporting their data maturity journey*' as doing data work on behalf of organisations, while being directed by their needs and interests, being transparent about what we were doing, and leaving organisations with insights so they could build on our work in the future (if support to do this is available).

For example, it was clear that the organisations could not independently complete a data audit, even with support**.** There was no capacity – a dedicated role, or spare time within existing roles – to assess the quality and potential of all their data in detail. Our intended process was not realistic in the context. It had involved having an organisation fill in an audit tool for all of their data, systematically answering approximately 11 questions for each data source, including:

- *How is this data collected? (Tell us about the process for gathering the data, tools used etc.)*
- *When and how frequently is this collected? E.g. weekly, yearly, one off ad hoc (give details)*
- *Where is data stored?*
- *What do you find easy or difficult about collecting this data? Are there any particular elements that are challenging either about the process or the data quality?*

Instead, we explored some of the quality issues by analysing the data ourselves, and taking the opportunity to ask questions about the data whenever that was possible. Within the scope and resource of this project, this could not be a systematic audit of all of their data. We focused on specific areas where we could access data, or where it was most relevant to progressing the case studies work.

Another dilemma during this phase was **how to agree a satisfactory end point** for the work; one which aimed to address as far as possible, all of the four drivers[8] for this project, while being mindful of the realities of the contexts we were all working in.

During the NELC workshop we explored different options for case studies and using data in different formats, and there was a high level of interest in doing more with their data in this way. We proposed focusing the remaining project resource on:

1. Analysis of each organisation's data, to produce a 'Data Insights Pack', including: a better sense of the quality and challenges in relation to their data, to guide their next steps on their data journey; and some analysis that can be immediately useful to their organisation, and possibly the wider NE Partnership.
2. Using some of this analysis to complete a 'case study'[9]. With the process of putting a case study together being way to work on some aspects of data maturity, while building organisation wide interest in committing to a longer-term data journey.

At this point in the project, we did not have access to the NE Partnership baseline data. Our intention was to use the analysis we did for the Data Insights Packs and case study process to identify if anything could be done to tell part of the NE Partnership story so far.

3.2 Learning from this phase

- What we suspected was an issue in Phase 1 was clarified during this phase - **individual data maturity and the data maturity of a partnership or group of organisations are two quite different things.** Based on our experience it seems important to have worked on progressing the data journey of each organisation individually, *before* working on the collective data journey of the group. The plan, tools and processes for individual journeys will not necessarily be exactly the same for collective journeys.

  These reflections raised a number of questions for future work (for which we don't have answers!). For example:
  - How would you assess the data maturity of the partnership, as distinct from the individual organisations?
  - Where do individual organisations need to be on their own data journeys to make effective data sharing between organisations possible?
  - By understanding where each other are on their data journeys, would organisations be better able to work collectively with their data?

- Some issues relevant to **using Data Orchard's excellent Data Maturity self -assessment tool[10]** (although our observations are based only on two people from one of the organisations completing the tool)**:**
  - It may be that when people are at a relatively early stage of the data journey, and self -assessing, they 'don't know what they don't know', which potentially leads to inflated scoring.

[8] Data maturity (as a minimum not losing motivation); data informed insights on the NE Partnership; support the development of case studies; gather learning about how to support data work.

[9] See for example '*Using Data to Tell Your Story: A short guide & examples from the NE partnership with North East Law Centre and Justice First'*

[10] https://www.dataorchard.org.uk/data-maturity-assessment-tool

    - The way an individual is scoring may be a conflation of how they assess their own, personal data practice, and how they see the organisation's Data Maturity.
    - We used the free version self-assessment tool but believe the 'paid for' version would be more accurate for understanding an organisation's Data Maturity. This enables everyone in the organisation to complete the assessment, and an organisation wide aggregate score is produced.
    - It was very hard to get a true 'before' score using the Data Maturity Self-Assessment tool, as we had done some work with individuals in both organisations, before we had an opportunity to introduce the tool.
    - A process to try in the future, if looking for a 'before and after' change in Data Maturity, might be organisation wide completion of the paid for version of Data Orchard's Data Maturity Self-Assessment tool, during the 'pre-project' phase we suggested in our learning from Phase 1, and then again at some point after the project has ended. It is worth noting that completing this organisation maturity framework will take longer and it is important that a good amount of time is set aside to do this properly. The exact amount of time required will depend on the number of participants and their different experiences with data.

- We also reflected on **how much background information on Data Maturity and data journeys is useful**. What is a good balance between presenting background information and getting going with 'doing stuff' with data?

  Based on our experience in this project, and especially for those at an earlier stage of their data journey, spending some time presenting background information was helpful. It meant people were able to see the entirety of the data journey, including aspects they might not have been aware of, which supported a less inflated assessment of how far along they are.

  We also found it helpful to share a few key findings from the Data Orchard annual survey on Data Maturity in the not-for-profit sector.[11] This provided reassurance of how few organisations are fully 'mature' in their data practice, including much larger and better resourced organisations, and really brought to life the nature of data maturity as an ongoing journey for organisations.

- If organisations are working in a context of always dealing with immediate, urgent issues, it can be difficult to see how there is time for the important, but perhaps less urgent, work on progressing their data journey. **Invest in a 'building the appetite' phase,** early on in projects. Particularly with organisations who have limited capacity, and are doing little with their data that is directly useful to their work.

  In this and previous projects, we have found doing some data analysis and creating something tangibly useful with data very early on, can help organisations justify time away from the 'urgent' work. It is also a helpful way for data practitioners to get practical insight into data at an early stage, both from the analysis and from the process of validating the analysis with the organisation.

  In this phase, the case studies / storytelling work we did with NELC during the workshop was popular, and something they had already been thinking about how to work on, to make more of the data they have. If we had our time again, we might start with a 'building the appetite' phase that combines doing some analysis of their data with this session on case studies / storytelling, with a view to getting a quick, useful output for the organisation at an early stage of the project.

[11] Data Maturity In the Not-for-Profit Sector, 2021 Report Written and researched by Sian Basker and Matthew Gosling, September 2022 https://www.dataorchard.org.uk/data-maturity-nfp-sector-2021-report

- **Mapping data flows** worked really well for understanding what is collected when, where it is stored, and who it is shared with. Particularly where there is no single 'data lead' with oversight of everything. The level of completeness is dependent on getting a wide range of perspectives on how data moves across an organisation. But it is a relatively easy process to spend a few minutes on in different meetings – taking the data work to people, rather than forcing extra meetings just to work on the data flow.

- The **tools (particularly Lamplight) can limit the data journey.** There are some particular challenges with Lamplight as it is not very easy to access the raw data behind the reports. Specific Lamplight issues include:
    - It can be very easy to get misleading totals when generating data summaries in Lamplight. Where multiple criteria are included in the report design, the totals provided may only give data where there is information for both criteria, rather than blanks as many data systems would do. This highlights the importance of only searching for as few combined criteria as possible when you want totals. It also demonstrates the importance of critically assessing the outputs for reports to ensure they are meaningful and seem plausible.
    - The download feature does not extract the bottom summary data from the tables, so totals and the mean figures are not included in the extract. This is useful validation information that supports critical thinking.
    - Care must be taken around how some fields are used. We observed that the system was set up in a way that a field is sometimes used for multiple purposes, capturing both client and staff activity data combined into one field. This can make it challenging to analyse the data.
    - Lamplight downloads do not include information on the filters applied as part of the queries of the data to generate the report. This can mean that data extracts do not have the same quality audit trail. Therefore, care needs to be taken to manually document the process of running reports.
    - There is no way of gaining or extracting simple subsets of the data. The only way of gaining a whole-system view is by requesting 'a backup file' which is structured as a SQL database, and then joining the constituent tables to establish a client-centred perspective. This requires advanced knowledge of SQL and contextual information regarding the structure and keys that link the tables together.

  These issues can make it hard to trust the data without extensive triangulating of information. It is also worth noting that these tools are used as case management systems, which is a different purpose than for extracting data for other purposes, and their value cannot therefore be assessed purely in terms of data analysis and reporting.

Resources & tools we used

- Data Orchard Data Maturity Assessment (free version)
- Data Orchard 'State of the Sector' 2021 report
- Miro
- Zoom

4 Phase 3: Data analysis, planning and a pause

Original Plan (expected Oct - Dec)	**Revised Plan (agreed early Nov)**	**What Happened In Practice (between early Nov & Christmas break 2022)**
Identifying data needs and gaps • Group learning session • Development of topic guides for interviews • Interviews with a range of stakeholders • Local support - identification of data needs and gaps • Group session to identify shared needs and gaps • Slide pack written synopsis	**With NELC:** • Design some support to bolster their internal efforts on 'case studies' / storytelling • 'Case studies' might mean a process / tool, and / or a storytelling format. Emphasise the value of standardised approaches that can be replicated easily & aggregated up. • Populate chosen format with the available data • Ability to do this within project timeframe dependent on NELC capacity **With Justice First:** • Run a shorter version of the NELC workshop from Phase 2, with the data lead. Focus on the case studies elements. The purpose being to work towards a completed 'case study' for Justice First (previously identified being interested in a costing tool & further GIS work on postcode data). • Have the data lead complete the outstanding Data Maturity assessment during this session. Explore options for engaging with service users to hear their perspective on providing data (including a request via the NE Partnership Steering Group and through Justice First).	• Between agreeing the revised plan and the Christmas break, we were told the data lead at Justice First had left. • Met with Justice First team mid Dec, and agreed a date for a workshop in mid-January. • Made first contact with the newly appointed person at NERS, with the possibility of their engagement in this project to be explored in the new year • Agreed a date for a meeting with two members of the NELC team in the new year, to progress work on their case study • We were granted administrator access to Lamplight which allowed us to explore the data set up behind the Lamplight front end (20th Dec) • Submitted the proposed structure for this learning report, and agreed other opportunities to share learning.

4.1 Dilemmas and ways forward

Planning to bring all three organisations together for **a group session felt impossible** at this stage as the specifics of what would be possible with two of them was still to be decided in the new year. However, we recognised that a final reflection and sharing session on their individual journeys through this project would be useful. We concluded that it might be useful if they were able to see the contents of each other's 'insights pack' and share their case studies. The aim was that this might encourage and support them to continue their individual data journeys, and spark some thoughts about their collective data on the NE Partnership.

Without **raw baseline data on the NE Partnership,** we started to explore what might be possible to say about the partnership, using data from individual organisations. Specifically, postcode data, showing where people seeking advice were coming from, with the possibility of building some narrative around how this might have changed since the partnership started.

Lamplight was a barrier here, because of the system issues identified above. As a result of these issues, and particularly the limitations of the reporting system, we focused on trying to access the raw data. However, this also proved to be a complex challenge within the system and produced a series of many linked datasets which required detailed context and data entry knowledge in order to join tables together into a useable database.

Time started to feel tight, with the planned end of the project in sight and needing to start again with Justice First. The responsiveness, commitment and enthusiasm from their team meant it still felt possible to make some good progress in the remaining time.

4.2 Learning from this phase

- There are a range of different skills with respect to data that need to be applied in order to improve data maturity and make better use of available data. It is necessary for instance, for everyone to have some degree of skill in terms of critically reviewing the data that they are presented with, with some potentially having more advanced skills than others. You also need at least one person with the technical skills necessary to extend the use of data beyond simply the reports that are generated by software. Improvements in data is not something that can happen overnight and changes to software and collection process and mechanisms take time. The need to improve data needs to be balanced with the day to day service operation and the capacity requirements this entails. As such some **prioritisation around changes is necessary.**

  The data insights packs, and case studies we produce for organisations, and the statements we were able to make from them can help inform how organisations prioritise the next steps on their data journeys. These outputs from the project help organisations think through the stories they are most keen to tell, and work backwards to identify where they are most interested in improving their data and what support, if any, they need to be able to do this.

  In determining prioritisation, ideally the organisations need to look both at an individual and partnership approach. There will naturally be some benefits around having similar priorities and timelines so that shared categories and definitions can be developed and agreed at the same time across the partnership. The extent to which this is possible alongside organisations working on their own priorities, is something to work through.

5 Phase 4: Final push – meetings, analysis, data insights packs & case studies

Original Plan (expected January 2023)	What Happened In Practice (between Jan & Mid- March 2023)
Reflections • Data Maturity assessment (repeated) • Group reflection session • Learning paper, building on reflections documents • Support for a client led external report **Case study / storytelling** • Detail to be agreed – guide and / or example case studies	No further formal revision of the plan, the previously agreed version had enough flex built in to be able to respond to change during this phase. **With Justice First:** • Workshop on 16th January with the whole team; introduced and agreed a focus for the case study work • Draft Data Insights Pack, based on analysis of their data, sent to Justice First (27th Jan) and met with them for feedback a few days later (30th Jan) • Finalised Data Insights Pack based on the team's feedback • Meeting with team to progress focus and design of case study (6th Feb). • Finished case study based on team's feedback • Final Data Insights Packs and case study sent on 28th February and 9th March respectively **With NELC:** • Workshop with broad participation on 19th January to try and pin down focus for the case study • Follow up meeting on 27th January to confirm focus & design of case study & confirm what baseline data is available for the NE Partnerships • Data Insight Pack, based on analysis of their data, sent to NELC on 28th February along with a draft case study that we subsequently met to review and consider refinements • Finished case study based on team's feedback • Final case study sent on 16th March **Overall:** • Analysis of each organisations data, and postcode data to produce maps of where NE Partnership clients are coming from • 'Learning Report' and 'Using Data to Tell Your Story: A short guide & examples' submitted • Final meetings with funders, including planning to share learning from the project more widely • Planning for a session to bring Justice First and NELC together, as the end to this project • Process for service user involvement designed, and final efforts to recruit (unable to complete)

5.1 Dilemmas and ways forward

We were all **working with a tight timeframe and limited capacity** to get to a positive and useful end point, after delays in accessing data and personnel changes at the start of the project. We shifted focus from 'supporting' organisations to produce case studies, to producing them ourselves, with the organisations' essential input and guidance along the way. For example, to identify case journeys from their work to compliment the quantitative data from the data insights packs; advise on accuracy of content in case study drafts; highlight issues around anonymity and so on. This was the best way to manage the combination of organisations' enthusiasm to get the case studies completed and squeezed capacity.

We were **unable to involve service users in the project**, despite attempts. Best effort was made by us and one organisation to try and make this happen, but it was not possible due to limited capacity available to organise the contacts within the timeframes for the project. We designed a process for service user involvement, including two options for setting up conversations, one where the organisation filled time slots provided by us, and one where service user contacts were passed to us, to contact people directly. We also explored whether it would be possible to ask questions through an existing service users' meeting or group. The process we designed also covered: confidentiality and anonymity; dynamic consent; questions to discuss and options for compensation.

We confirmed that **there is very minimal data about the NE Partnership as a whole**, in particular:

- There is *no source of client profile data for the NE Partnership as a whole*, only by each organisation. It is not possible to easily identify whether the same person is being supported by more than one organisation as there is no shared unique ID or primary key for clients.
- There is *no equivalence between the two organisations data in terms of how they measure 'engagement with services*'. It cannot be compared as counting similar things. It is not entirely clear what is included as a count of 'attendance'. And there is no data on, for example, patterns of engagement, whether a person has missed appointments, or the profile of hours of support per person across different services within the partnership.
- There is *no data on the types of services provided to NE Partnership clients beyond the matter type, which is recorded differently in each of the organisations.* There is little standardised data on the types of services provided to NE Partnership clients beyond the matter types, which are recorded differently in each of the organisations. The use of categories which are specific to the organisation and not the partnership means it is not possible to easily link, combine or compare datasets. In depth operational knowledge is required to interpret when a particular box would be ticked. If it isn't your dataset it would be very difficult to understand, and data may be recorded inconsistently internally within each organisation.
- Very little data is captured on referrals and *it is not possible to easily follow a person's pathway between different organisations in the NE Partnership*, using data.

Despite this, we were able to use top level post code data (post code districts) to produce a map of total work hours recorded on NE partnership cases by NELC and Justice First combined, and aggregated by Local Authority. We were also able to chart how NE Partnership data currently flows within and between NELC and Justice First, as a useful starting point for thinking about how to develop data capture and flow.

When **writing case studies** we were unable to include some interesting details in individual case journeys, where they could risk the anonymity of the person or family in the journey being described. For example including country of origin, gender, number of children *and* eventual employer, might make someone's identity less anonymous, especially when talking about a specific geographical area, such as the North East. The organisations were able to advise and guide on this.

Identifying **a really good example of a client's story or journey** was not always easy when starting with the information on case management systems. Speaking to staff and volunteers about cases they had in mind, and then checking the specifics of the case on the system, was more effective, and combining information from both could provide a richer set of details. It could be quite challenging to find a single story that aligned with all of the quantitative data points, and we did discuss the option of creating composite stories, made up from elements of different individual cases. Overall, we and the organisations felt that using real cases was more compelling and credible.

The **ending of the project** was not able to offer organisations a next step in terms of ongoing funding or support. Instead we planned a session to bring them together to share what they had done, with a view to identifying 'what next?' for them as individual organisations and working together in the partnership, and what kind of support would be needed from funders.

5.2 Learning from this phase

- **To understand an organisation's data, it is important to hear from a wide range of people**. This creates a much more detailed and nuanced understanding of data, and data practices. During our workshop with the whole Justice First team we learnt more about their data than when we had been working with only the 'designated data lead'. The same was true with NELC, the more perspectives in the room, the richer the understanding about data - how it is entered, stored and how to interpret it. For example, when producing NELC's case study a solicitor was able to offer very specific wording on how different aspects of the example client journey would have impacted not only on the client, but could also cause pressure on UK Visas and Immigration and other public services, leading to a more powerful narrative. Including a wide range of people also helps reveal different data practices *within* the organisation, which matter as much as understanding how separate organisations work with their data in different ways.

- **Starting with an audience and purpose in mind** is very important for creating focused, effective case studies. This stage of the process needs to be given enough time, for people to step away from their interests and concerns and really think deeply and specifically about intended audiences and how to influence them. What intended audiences are interested in and influenced by, may often be quite different to what people doing the work day-to-day experience as important and interesting. This project was focused on sharing the process to getting to case studies, and the time spent on audience and purpose for a specific example was necessarily truncated. But time and support to get this targeting right is at least as important as access to software and tools for producing graphics, for example.

- **Don't forget about use of secondary data** as part of an organisation's journey towards data maturity. Both of the organisations were able to strengthen their case studies by including data from other sources, for example Government data or academic research. A recent example of secondary data being put to good use is from the Refugee Council, in response to the migration bill announced in March 2023, appendix 3 of their assessment of the impact of the bill includes how they used secondary data to demonstrate the high costs of the bill to the taxpayer, if it becomes law.[12]

[12] https://www.infomigrants.net/en/post/47675/uk-refugee-council-warns-of-high-costs-if-migration-bill-becomes-law; https://www.refugeecouncil.org.uk/wp-content/uploads/2023/03/Refugee-Council-Asylum-Bill-impact-assessement.pdf - (see appendix 3 for use of secondary data)

- It is important to **explicitly ask organisations what kind of support they need to progress their data journeys,** to be able to make the case for funding with greater detail than "more capacity needed". We have had some thoughts about a funded data practitioner role, with an allocation of time for each organisation, and a brief to 'hold' the NE Partnership data. The idea being that someone with good insight into data of all the individual organisations is going to have a better sense of how to progress the data maturity of the partnership as a whole. But this kind of initial thinking needs more robust sense checking with the organisations involved. Along with exploring what models of support are working well elsewhere.[13]

- This is linked to the importance of being able to end this kind of project with a clear message about **what comes next to support organisations with their data journeys**. How support that includes analysis of data and practical outputs can also help with this. In their respective Data Insights Packs, we structured the organisation's data with the idea in mind of helping them be able to see the next steps and choices on their data journeys. Each slide included analysis of their current data, in the form of a chart; a short description of what the chart is telling us; and a short discussion of the observations and implications about the data, which includes how it is currently unclear, or could be improved, what to consider when deciding whether this is a priority for action, and so on. In this way the packs help to break down some aspects of their data journey into manageable steps.

- How can small organisations be **supported to maintain consistent knowledge about their data, especially through personnel change**? There are many different types of 'knowing' about data, that all contribute to the overall data maturity of an organisation.

  These include knowing about: what data is asked for, how it is asked for; what isn't asked for and why; particular events that influence data practice (e.g. an audit, new funding with reporting requirements); knowledge about legacy systems and transitions between them; and the technical skills and knowledge of working with a particular case management system or software, in this project Lamplight and Advice pro. Keeping some kind of log of these different ways of knowing about the data may offer some continuity. We don't mean something as comprehensive or overwhelming as a full system documentation as this is beyond the organisation's capacity, but a simple reference guide could be helpful for all those interacting with data, and creates an organisational memory to help interpret the data going forward. And as a way of flagging the limitations of different systems and how to take this into account when interpreting reports, for example.

- **Progressing towards data standards** may bring significant benefits in terms of data quality and useability,[14] ultimately easing the burden of reporting. But the organisations in this project currently lack the staff capacity and technical infrastructure to implement and use a shared data standard. Another important building block for developing standards is also time and space to understand current practices, such as how different organisations recognise something as needing to be 'counted'. To be able to follow a person's pathway through services and systems, a referral pathway for example, you need to be able to recognise what it is you are trying to follow through the data, is what you are trying to follow through the data being counted in the same way by different organisations? There needs to be more work done to understand how different organisations recognise something as needing to be 'counted'. Perhaps a 'how we see data' session. This means facing the practical challenges of trying to get time in diaries where

[13] For a more detailed discussion of the need for data leadership, and options for how this could be developed, See Gyateng, T. (2022) Data Leadership in the access to justice and wider not for profit sector | Justice Lab Justice Lab

[14] Gyateng, T. (2022) Developing Data Standards for Access to Justice Organisations: A Working Paper | Justice Lab Justice Lab

a wide range of participants from more than one organisation can all attend. This is the kind of commitment that could be made and resourced in the pre-project design phase, previously mentioned.

However, there is already an appetite for some degree of standardisation where that can be accommodated within current data collection and there may be value in developing guidance for collecting specific data points which would be compatible with the organisations' current capacity and technical infrastructure. For example, to help the organisations align their data collection with each other and better understand referral pathways, there might be a top layer of categories that everybody across the NE Partnership can use quite easily. Perhaps including (for purposes of example only): 'Have been a previous client'; 'Solicitor'; 'Word of mouth'; 'NE Partnership organisation'; 'Media' and so on. With a further layer of sub categories that allows for greater granularity, and suitable for different organisations – for example name of solicitor; route of 'word of mouth' as 'family' or 'friend'; a list of all the individual NE Partnership organisations; different media sources such as 'website', 'leaflet', 'local newspaper' and so on. It may be that the Open Referral UK standard could provide a starting point for a taxonomy of organisation types, which when collected alongside the name of specific organisations, would allow for comparison with referral pathways beyond the partnership.

There may also be scope to better align their data collection with national datasets, for example by collecting ethnicity data in line with the Government Statistical Service's Harmonised standard for ethnicity. This would allow organisations and the partnership to (in part) understand the representation of different ethnic groups in their client base and compare this to the wider population.

As organisations are already motivated to work on their own data they may be able to prioritise some of the same categories, and work towards improving them together, in the same direction, for example by using harmonized standards. Particularly if it is clear how they would be able to do more by combining their data, and could provide a foundation for deeper joint working towards data standards in the future.

Shared reporting systems and data standards offer many benefits that make the journey worthwhile, including:

- Improve data quality and completeness by presenting a select choice of pre-determined categories for selection as well as prompting staff to fill in categories in order to develop a partnership-wide understanding.
- Reduce reporting demands across the partnership as the data would be consistent between organisations and over time. A shared reporting system could facilitate the immediate aggregation of data and reduce the burden of collating data from different sources.
- Lead to a better understanding of the client base and of referral pathways. This is in part due to greater data completeness and comparability of data, as well as having undertaken a research process which considers the full range of client characteristics and referral agency types (e.g. through a standardised taxonomy). If the same reporting system was used and clients had a unique ID then it would be possible to easily identify the movement of clients through the services provided by the partnership.
- Allow for collective impact stories to be developed and for individual organisations within the partnership to understand their role in the partnership and have greater oversight of the work of the partnership. This in turn could increase organisational buy-in and sense of ownership over both the data and the wider work of the partnership.
- From the perspective of an external support provider, a data standard (and particularly data collected on shared reporting system), would facilitate swift and secure access to select reports.

5.3 Resources & tools we used

For more detailed information on tools and processes involved in creating the case studies for this project please see *'Using Data to Tell Your Story: A short guide & examples from the NE partnership with North East Law Centre and Justice First'*

- Power Point
- Excel
- MySQL Workbench
- QGIS (Maps)
- Venngage
- Canva

1 Introduction

In this section we re-structure some of what we have learnt through the process of working on this project, by what we think is most relevant and useful for: funders interested in funding organisations to develop their data maturity; not for profit immigration legal advice and support sector organisations; and data practitioners. We encourage you to look at the 'learning by phase' for more detail.

While we have presented learning for these individual audiences, in reality much of the learning is cross cutting, and applies to all audiences in different ways. Close co-ordination, joint working and shared learning between funders, not for profits and data practitioners will be key to the success of effective support with data.

As we have emphasised throughout, we are not providing an 'off the shelf' process, or 'best practice' recommendations. We are sharing our reflections on practice, and what we think, based on our experience with Justice First and NELC, would be useful to consider in future work to fund, design and deliver data support to organisations.

The specifics of how future work is funded, designed and delivered should also take into account the detailed context of the work in question, and have an eye to the ongoing learning from other projects supporting organisations with data maturity.

2 For funders

Given the very different starting points and capacities of organisations, **involving the not for profits you want to support** in how you design funding of support is essential. It is essential to understand where each *individual organisation* in the group is on their data journey, and the capacity they can realistically bring to the project.

It is perhaps helpful to **think of funding and commissioning support with data as a 'pre-project' phase of activities**, in addition to the formal commissioning and governance processes of your organisation. This should include:

- Reviewing latest learning from the practice of supporting organisations with data. Supporting organisations to work with data, particularly not for profits with less resource, is a relatively new and fast moving area of work. What can you learn from Justice Lab; Data Orchard; other funders who have done this kind of work; grantees you support who have had previous experiences (negative and positive) of support with their data and so on?

- All participants being clear on, and perhaps documenting in a 'terms of engagement' the respective roles and responsibilities of organisations, and individuals within organisations.
    - The purpose of the work
    - The resources involved
    - The need to set up access to data by a specific date (ready for the start date of commissioned support) – individual organisation, and any partnership structures for holding data
    - Peoples' time / availability to take part, and shaping project timelines to fit this.
    - The assumptions being made about the type, quantity and quality of data that is available

Be **very clear and transparent about what data support you are funding**:

The data maturity of individual organisations is separate and different from the data maturity of a collective or partnership of organisations. The two are linked, for example where individual organisations are on their data journeys will influence how they are able to contribute to a joint working arrangement. Based on our experience it seems important to have a very good understanding of individual data maturity, before deciding what might be possible for a collective.

Questions to consider could include:

- To what extent is your funding about supporting the data journeys of individual organisations?
- If you are focused on data in relation to a particular project or programme of work, are you able to support the development of general data maturity of an organisation, in order to access better data on the specific area you are interested in?
- Are you clear about whether you are funding to support 'data journeys', which are unlikely to have a clear and definite 'end', compared to funding 'projects? What is your exit strategy from this journey, how much progression do you want to support?
- When it comes to prioritising aspects of a data journey for an organisation to work on, do you expect to be involved in that prioritisation or is that something that organisations can determine for themselves?
- Do you have any expectations or assumptions about what kind of data you will be able to see as a result of your funding? How does this align with approaches to prioritising areas to work on?
- How adaptable is the funding to work with unanticipated needs that arise?

It is very helpful to be able to **signal from the beginning 'what comes next?**' after specific funding ends. The organisations we have been involved with have an evident interest and motivation for doing more with data, ideas about what would be good to do and the challenges they need to overcome, but much of this ambition is beyond the scope of available resources.

Where can organisations look for ongoing support with their data journeys? Even if data maturity progresses in some areas - for example in how data is used, culture or leadership - some very fundamental capacity issues may remain. What are the implications of revealing the potential of data, and extent of the data journey ahead of them, to organisations already overstretched with current work, and without a clear plan for support over the longer term?

Is there a need for a collective approach from funders to co-ordinate their support on data, or commit to development of sustainable data practice?

As they learn from funding data support work**, what can funders share from their own practice that is useful to the sector as a whole?** For example learning about how to scope and commission data support; how to structure payment milestones and manage the need for adaptability, sources of data practitioners, lessons learnt about what they would do differently next time, and so on. Who is co-ordinating the learning from data practitioners about how to do this work well, so it is easily accessible to inform future data support work?

3 For not for profit immigration legal advice & support sector organisations

For everyone involved, but perhaps especially so for not for profits, **starting work on data with an approach that 'builds the appetite' is essential**. Particularly for organisations who have limited capacity, and are currently doing little with their data that is directly useful to their work. This means as early as possible supporting data practitioners to help you do something with your data that is immediately recognised across your organisation as something that is practically useful to your work. Organisations often recognise how 'important' data is, but working on data maturity can easily be relegated behind work that is seen as 'urgent' – funding, getting to grips with sudden changes in policy, dealing with staff shortages etc. How can data quickly be seen as an aid to the 'urgent' work?

Data is part of everyone's job within an organisation. And **involving a wide range of people in work to support your data journey will bring many benefits**. These include a level of detail and precise understanding about how data is worked with. In this project, mapping how data flowed within and between organisations was more complete the more people were involved. Broad involvement also increases the range of perspectives on how data could be more useful, build a sense of ownership over data, and aids work towards developing data maturity throughout the organisation, not only within certain roles.

Understanding and **talking about your work with data as a 'journey'** is helpful for managing expectations that data will ever be 'finished' at the end of a project or specific funding. Support to see the possible steps and choices around what to prioritise to progress your data journey can also help data maturity seem more manageable, as something that can develop over time, in tandem with all the other pulls on an organisation's capacity, and in alignment with the capabilities of the organisation. Seeing the steps and choices may also help reveal the specifics of the kind of support your organisation needs to be able to progress in specific directions, making clearer the ask to funders.

As you start to identify priorities for action with your data there is an **opportunity to work in partnership with other organisations.** Are there categories of data and definitions that you can agree with others, for example agreeing some standardised ways of counting things, or using categories from nationally recognised datasets, so data improves for your organisation and has more power when it can be combined with data from other organisations?

Take time to think about the audiences and purposes for your data. Effective communication, through case studies, stories and data visualisation, involves having a specific audience in mind, and an idea of what you want the audience to do as a result of seeing your data. This stage of the process needs to be given enough time. Time to step away from our own interests and concerns to think deeply and specifically about the intended audiences, and what will influence them. And thinking of the stories you want to tell with your data, as a process, not individual outputs, will help routinise data collection in a way that supports more efficient use.

Be realistic about what is possible and celebrate small steps forward. You are not large organisations with money to pay teams of analysts and access to the corporate data sets of Google or Facebook. But as you can see with the case studies produced by Justice First and NELC, it is very possible to do something effective by starting where you are, and planning for where next.[15]

4 For data practitioners

In our original bid for this work we described the following skills as being important for successful delivery:

- Data audits / gap analysis, including mapping data pathways
- Data collection frameworks and templates
- Data analysis and presentation
- Learning and data sharing events

[15] See '*Using Data to Tell Your Story: A short guide & examples from the NE partnership with North East Law Centre and Justice First*'

- Development of case studies
- Consensus building within and across teams
- Working sensitively and coaching to support people with different levels of data literacy

Now, at the end of the project, we would add:
- Willing and able to radically adjust the process and type of work involved to meet the needs of the context you are working in
- Able to shift from a 'developing capacity' role to 'being the capacity'; willing to roll up your sleeves and analyse the data, write case studies, source the secondary data etc.
- Flexibility to fit in with quite limited availability and able to respond at short notice when people are available.
- Have the time needed to: build mutual understanding about the focus of the work; the starting point of individual organisations; and to build trusting relationships.

Have a number of days of **capacity at the start of the project which is just focused on exploring and analysing data,** so there is something tangible to work with, and as a way of providing a simple output, that shows how data is directly useful to organisations at the very start of the process. This is helpful to quickly build broad engagement, by demonstrating the value of a data journey in a very practical way. It is also an efficient way for you to build understanding about an organisation's data. Regardless of how projects have been initially planned or structured, we have found this to be the most useful way to start. We think this would be even more powerful if the initial analysis was tied into early work on case studies / storytelling, taking a small piece of analysis all the way through to a useful output, right at the start of the work. And then working backwards from there, to make the case for working with data, introducing Data Maturity and so on.

Distinguish between the individual data maturity journey of an organisation, and asks that are around the data maturity of a partnership, group of organisations, or specific programme of work. These are separate but linked and raise a number of questions (for which we don't have answers!). For example:
- How would you assess the data maturity of the partnership, as distinct from the individual organisations?
- Where do individual organisations need to be on their own data journeys to make effective data sharing between organisations possible?
- Would organisations understanding each other are on their data journeys, help them work better as a group?
- How can you progress to better data about a specific programme of work, without supporting each organisation involved with their own data journeys?

How can data practitioners better share what they are learning through practice?
Throughout this work we were conscious that there are others working on similar issues, all with their own experiences, learning and tips to share. We wonder if there is value in funders convening some opportunities for sharing and documenting our learning from practice, for the benefit of all?

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