



## *How Data is Helping one Small Charity 'Work Smarter'*

### *COPE Scotland*

#### **A. Introduction**

Cope Scotland is a good example of what a small charity on the cusp of entering the 'data age' can do with a system that is still predominantly paper-based. It is using data for a number of purposes, including problem solving, service planning, and performance evaluation.

#### **B. Discussion questions**

1. What is driving developing data capabilities within the charity?
2. What key short-term benefits is the charity deriving from data, and what will be of longer term significance?
3. What are the main barriers to developing the charity's data capabilities?

#### **C. Organisational profile**

COPE Scotland is a mental health and wellbeing charity. Its annual income in 2014/2015 was approximately £297,500. It has three directly employed staff. Its frontline services are delivered by independent, self-employed professionals and a team of 100 volunteers. In excess of 2,000 people directly access its frontline services each year. Its website had over 18,897 unique visitors and recorded 1,369,939 hits in 2015/16.

#### **D. What is driving the charity's engagement with data?**

The chief officer's background has ingrained in her an appreciation of the value of data. As a student studying the social sciences, she saw how it could throw fresh light on social issues. Later, as a psychiatric nurse, she saw the crucial role that detailed nursing notes had in enabling medical professionals to see what worked for patients, as well as what did not.

### **E. How important is digital technology for the charity's data utilisation?**

The charity has recently begun to move to a new computerised client records system based on Microsoft Excel. This will significantly enhance the charity's capacity to interrogate and analyse its client data. It will also reduce the current high level of dependency of the charity on the tacit and personal knowledge held by the chief officer.

Prior to the introduction of this new system COPE Scotland was an entirely paper-based organisation.

### **F. What types of data is the charity capturing and using?**

The charity captures personal data about its service users, including referral data, appointment data, and progression and impact data generated as service users move through a service pathway. It also exploits data generated by external bodies such as the police, the fire and rescue services, and the Centre for Population Health, for example. Data about the local community such as public transport information, population demographics and economic profiles is also drawn on as required.

### **G. What is data enabling the charity to do differently or better?**

#### *Managing waiting times*

Data is enabling COPE Scotland to respond quickly and effectively to avoid the formation of waiting lists for services. By monitoring referral rates, and the reasons for referrals the charity has been able to identify patterns that lead to 'spikes' in demand for services. This allows it quickly to recognise incidents that are likely to trigger a sudden rise in the number of people being referred for support and to allocate resources accordingly. Bringing data to bear in

these situations has meant that the charity has been able to identify connections that would not have been obvious otherwise. Thus, while experience alone might have led the charity to expect a sudden spike in referrals following the announcement of a forthcoming change to a state benefit entitlement, it is much less likely that it would have enabled staff or volunteers to make a connection between a terrorist attack in another country and a sudden increase in its mental health referrals. Yet, data has enabled the charity to identify a vicarious, potential relationship. The ability to make connections of this sort and to identify accompanying patterns of behaviour means that this small, locally-based charity, whose data management is still predominantly paper-based, is able to anticipate and prepare for a potential change in demand for its services.

### *More accessible services*

When it became evident that a high number of service users who had registered to attend a new support service were failing to attend sessions the charity needed to understand why this was happening. Analysis showed that participants from one particular post code area were much less likely to attend, than others. The charity mapped the post codes of the participants who were attending and those who were not. It then mapped the public transport routes that participants had to take and the costs of travel that were involved depending on the post code areas in which service users lived. The analysis showed that the public transport system was problematic for the client group that was failing to attend. The charity subsequently opened an outreach service in a new location that is easily accessible to this group. The attendance levels are now in parity with other services offered by COPE Scotland. The insight that this generated for the charity has led it to map all of the public transport routes in the areas it serves, so that it can identify and address the barriers people may face in accessing its outreach services.

### *Improved completion rates*

When it was identified that the completion rate on an 8 week Mindfulness Based Stress Reduction course was less than anticipated, an analysis of the charity's client and course feedback data enabled the reason for this to be identified. Despite being provided with information about the nature and timescale of the course participants were failing sufficiently

to appreciate what it involved. This led the charity to provide an induction and screening session which enables potential participants to make better informed decisions about the suitability of the course prior to registration. This has generated an improved completion rate on the eight-week course and to the delivery of a shorter-length alternative course for participants whose needs are better met through this route. This is already proving highly effective, with high take-up and completion rates, and high levels of satisfaction registered by participants.

## **H. What are the challenges associated with being a data-informed charity and how are these being managed?**

The charity is facing two key challenges as it seeks to become more data-informed.

### *Managing risk*

The first challenge that the charity faces is how to make its data engagement sustainable. The small in-house staff team poses a significant risk to data sustainability, as data processing is vulnerable in the event of the absence or departure of key personnel.

Two factors are crucial in managing the associated risk. Firstly, recognition of the need for long-term succession planning at senior management level is lending impetus to the case for investment in data and associated resources. Secondly, generating a dialogue with staff and volunteers about data – why it is valuable and how best to capture and manage it – is a first step towards delivering the organisational cultural change that will embed data within the charity's behavioural processes and routines in the longer-term.

### *Ensuring data quality*

The second challenge for COPE Scotland is how to ensure the quality and robustness of the data that is captured and processed.

Two factors have been crucial in enhancing the quality of the data. Firstly, its recent adoption of the Warwick Edinburgh Mental Well Being Scale (WEMWBS) has introduced a more systematic and standardised process for data capture and management, which is already

leading to noticeable improvements in data quality and comprehensiveness. Secondly, investment in staff training is necessary to equip personnel with the skills and confidence both to use and to continue to develop the computerised client records system.

## **I. What are the charity's next steps with data?**

In the short term managing and accessing data electronically will make day-to-day problem solving, service planning, and performance evaluation easier and more straightforward. Once it is fully on-stream the new Excel database will afford the opportunity to generate more complex and richer analyses of the impact of service interventions than are possible with manual, paper-based analyses. In the longer-term, the new digital client records system will be an important step in the charity's long-term succession planning, ensuring that organisational knowledge is robust and sustainable.

## **J. Some insights from the case study**

- A number of factors are driving developing data capability, including the CEO, the need for improved resource utilisation, demonstrating impact for funding bids, and succession planning.
- Data capability is supporting everyday problem solving, service planning, and performance evaluation. It is also developing the 'organisational knowledge' and organisational continuity required in the longer-term.
- Data needs to be embedded in the day-to-day organisational processes, routines and culture of the organisation. Everyone involved in its capture and use needs to appreciate its value to the organisation, and have the skills and confidence to work with it. There also needs to be accompanying investment in the charity's digital infrastructure.

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