Capacity Building for Peer Support

(Digital Training Package in PDF Format:
Complete Resource Available at
http://peerconnect.org.au)

Included Sections:

1. What is 'Gathering Evidence' all about?
2. Why collect evidence?
3. The BIG picture story behind collecting evidence
4. Why, what, who & when of gathering evidence
5. Tools & collection specifics
6. Beyond the tools
7. Using evidence internally and externally

This resource has been developed within the NDIA Peer Resources project with: funding provided by the NDIA (ILC), delivered by ANZSOG (in collaboration with SPRC and numerous co-design parties), authored by Dr Jennifer Job (Life Upcycled) and released 2019.

CAPACITY BUILDING FOR PEER SUPPORT

ONE: WHAT IS 'GATHERING EVIDENCE' ALL ABOUT?

SECTIONS:

THE 'WHAT IS GATHERING EVIDENCE ALL ABOUT' INTRODUCTION

Without google maps, where would I know where I am? I might suspect that I am close to the sea by the smell, in the city from my view of concrete walls, and near lunchtime by the growl in my stomach. But how do I know if I am close to where I want to be? Well that depends upon where it is that you want to be…and when you want to be there.

In this first module we simply define the key foundations that underpin this self-directed learning package. We consider: what do we mean by peer programs, and what do we mean by gathering evidence. This will guarantee we have a clear enough focus to ensure those investing their time and effort on this educational process know they are in the right place.

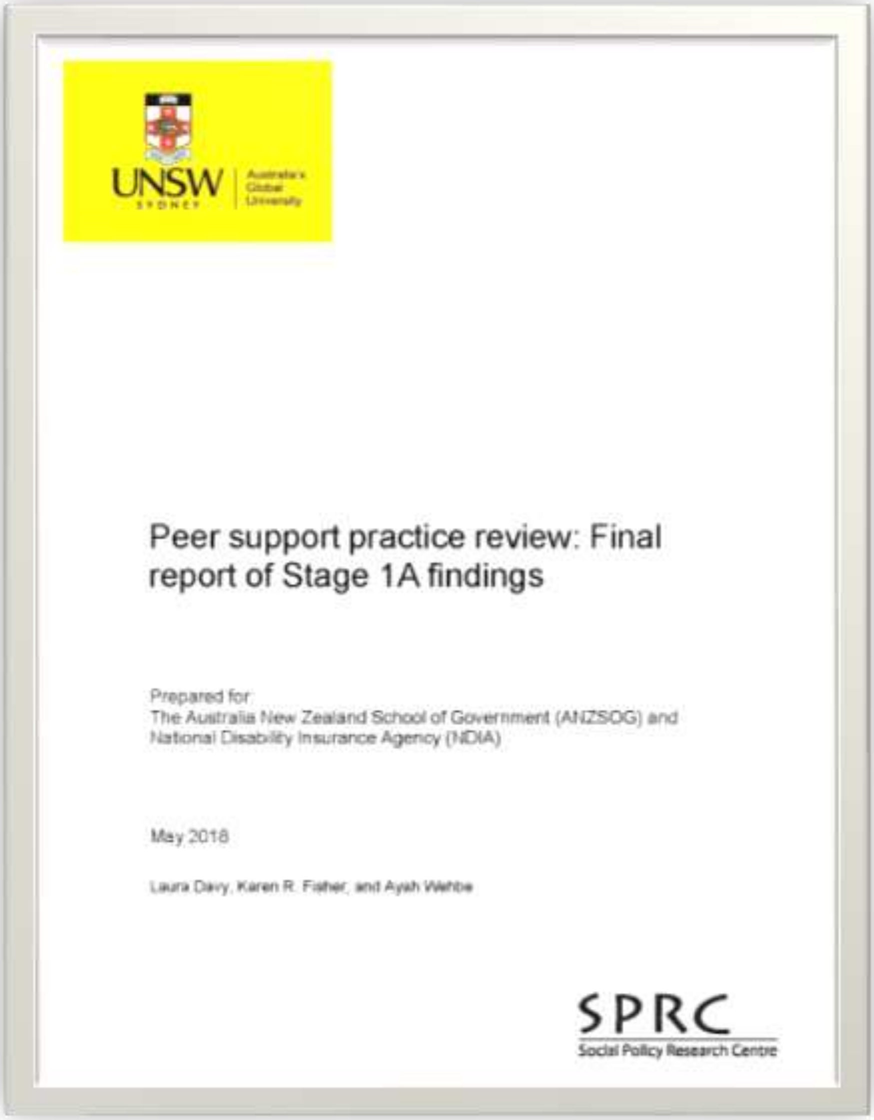
THE PEER PROGRAM CONTEXT

Peer Organisations operate among a disability sector where the NDIA/NDIS occupy a lead role. Peer organisations are most likely to gain the funding essential to deliver peer support programs from the NDIA under projects such as the Information, Linkages and Capacity Building (ILC) Grants scheme. As such, peer organisations will likely be functioning with the same clear foundation principles as the NDIS.

FOR FURTHER INFORMATION – SEE https://ilctoolkit.ndis.gov.au/

User-led organisations and/or those running peer support programs are no doubt strong supporters of these foundation principles. As such, this resource has been developed with a strong rights-based underlying philosophy which will be clear throughout each module.

The Social Policy Research Centre (SPRC) recently reviewed current peer support programs across Australia and, in May 2018, published a practice review (Davy, Fisher and Wehbe, 2018). This report identified a range of broader benefits from peer support including: The development of an informed and engaged disability community, together with awareness and capacity building within mainstream services, as well as, the wider community about inclusive strategies and engaging with people with disability and their families.



Peer support practice review: Final report of Stage 1A findings

Prepared for:
The Australia New Zealand School of Government (ANZSOG) and National Disability Insurance Agency (NDIA)

May 2018

Laura Davy, Karen R. Fisher, and Ayah Wehbe

SPRC REPORT: The Social Policy Research Centre (SPRC) practice review released in May 2018 (Davy, Fisher and Wehbe, 2018) is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.

One implication from this review was the finding that *'despite variation in peer support delivery, common values and principles of good practice peer support emerged' (p1)*. Research participants included a range of leading peer support providers from across Australia with expertise and experience in this space. They described good practice peer support as:

- Flexible – Responsive to participant needs and preferences;
- User-led – Led by people with disability and families, based around lived experience;
- Focused on capacity building – Predominantly for individuals;
- Semi-structured and purposeful – Organised with a blend of issues and information-based content along with informal or unstructured forms of support; and,
- Community facilitated and based/linked – Reflecting the need for the peer program to be facilitated through a community organisation to enable participant connections, and for it to have a focus on forging links with others in the community (other peer groups, mainstream organisations, services and government).

As such, in this learning package, we will be assuming we are aiming to assist disability focussed peer organisations who provide delivery models that are unique but aligned with these principles of best practice. This will all be discussed further in future Modules.

CAPSULE: PEER SUPPORT PROGRAMS CAN PLAY AN IMPORTANT ROLE IN ENSURING PEOPLE LIVING WITH DISABILITY & THEIR FAMILIES KNOW ABOUT THEIR RIGHTS. PEER ORGANISATIONS USE DIFFERENT APPROACHES TO DELIVER PEER SUPPORT PROGRAMS WHICH AIM TO ACHIEVE RIGHTS BASED OUTCOMES AND MEET THE GOOD PRACTICE GUIDELINES.

SELF STUDY Q1.1:
Does your organisation operate a peer program?
If so, please describe briefly ways in which your peer program reflect the concept of 'lived experience'?

WHAT IS 'GATHERING EVIDENCE'?

When naming this resource there were many debates, regarding language. Being within the disability sector, we all certainly understand the power of the words we use and being aware of their potential impact. Discussion centred on whether or not to use the term 'evaluation' to label this resource. Evaluation is defined in the Cambridge Dictionary as '*the process of judging something's quality, importance, or value, or a report that includes this information*' (see https://dictionary.cambridge.org/dictionary/english/evaluation). Evaluation involves observation and measurement, and comparing these findings to a set of criteria which are considered by the peer organisation as being indicators of good performance.

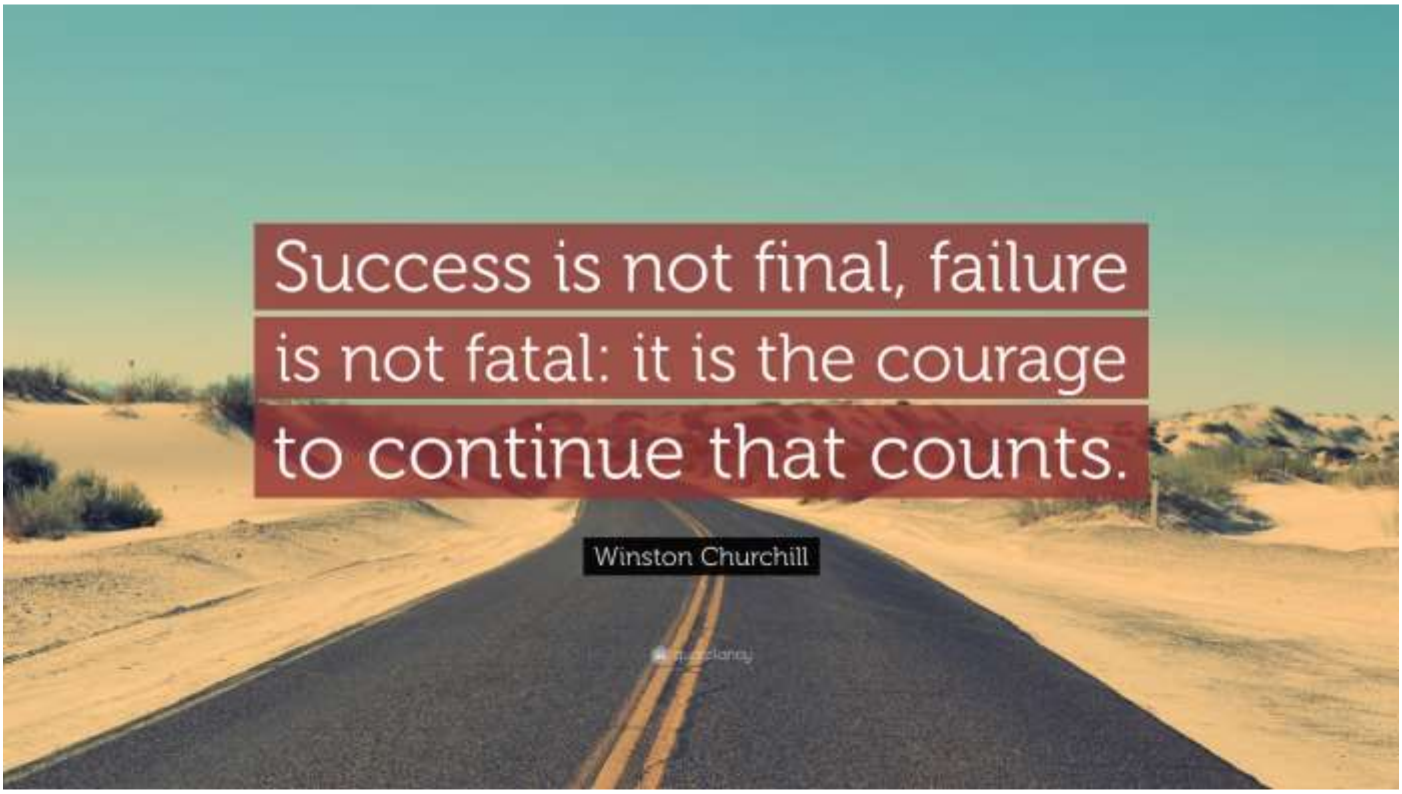
Within peer organisations, particularly those involved in the DSO project, evaluation has been undertaken in various ways and with differing levels of success (which will be discussed in more detail below). This led to many holding the view that evaluation was a term that was too academic, and possibly a little narrow, for the information collection process we are talking about in these materials.

Some people may think that evaluation needs to be undertaken for the benefit of people outside of the peer organisation, such as the NDIA and its ILC team. Others may believe that we only do evaluation within an annual review process, or in preparation of a grant report. In this resource, we are focussing on the entire process of collecting/assembling information for a specific purpose. This can include evaluation, undertaken for a range of stakeholders and reasons, both internal and external to the organisation. It includes gathering information, allowing us to examine our peer programs, its resulting feedback and informative links. Monitoring helps team members and peer leaders to understand whether their peer program is progressing on schedule and to ensure that program activities, inputs, outputs and external factors are proceeding as planned. In contrast, evaluation assists organisations to assess the extent to which projects have achieved pre-determined objectives. This means, we first need to be clear about what it is we are aiming to achieve – What is the purpose of our peer programs?

Monitoring and evaluation are fundamental aspects of good peer program management at all levels. They can be effective tools to enhance project planning and development over time. Within this resource, we focus upon developing expertise across the entire information collection process. This applies from our very first thoughts about why we should do this, thinking about what it is we may want to collect, right through to the final stages of putting our information together for a distinctive use or report. Monitoring and evaluation bring a range of benefits to any peer organisation, including:

- Providing data on program progress and effectiveness;
- Improving program management and decision-making;
- Facilitating accountability to stakeholders, including funders;
- Supplying data to plan future resource needs;
- Affording evidence on effectiveness that could help to secure continued funding or additional funding for new initiatives that build on previous work; and
- Offering data useful for policy-making and advocacy.

In these materials, we want to present a broad approach that encompasses gathering evidence for monitoring, evaluation and any other task to bring about positive outcomes in the sector. We certainly don't want peer organisations to be scared off by a term that is overloaded with past experiences of short term, high workload experiences which provided little feedback to enable improvements. Collecting information, which is relevant and can be utilized, has potential to bring a sizeable number of benefits to disability peer support programs. This is our motivation within this learning resource.



CAPSULE: GATHERING EVIDENCE IS THE PROCESS OF COLLECTING INFORMATION RELEVANT TO ANY NEED WITHIN THE PEER SUPPORT PROGRAM. THE AIM IS TO IMPROVE PERFORMANCE BY KNOWING MORE ABOUT WHAT WE ARE DOING AND WHY WE ARE DOING IT.

SELF STUDY Q1.2:
Give two brief reasons why your peer organisation could choose to undertake a process of gathering information.

IN SUMMARY

Disability peer networks and their organisations are founded upon the aspiration to build the individual capacity of their peer members through their programs. Such programs are created on clear principles based on the rights of each person living with disability across Australia. Peer support programs were reviewed, and the Social Policy Research Centre (SPRC) report (May 2018) expressed the clear need for greater resources in the evaluation field. Peer organisations need to consider how they can grow their evidence collection skills and expertise to ensure they can continue operating their much needed support programs.

Moving further into this training package, we will contemplate in more detail why peer organisations would want to gather evidence. We explore why aspects of the disability peer support program environment lead to information collection being of greater importance in the short-term, as well as, the longer term. We will also reflect upon the concept of organisational capacity building to ensure peer organisations are able to keep doing what they are doing well – Advancing the capacity of individuals living with disability from a lived experience perspective.

RESOURCES

- The ILC website provides background information on the NDIA's ILC program, see: https://ilctoolkit.ndis.gov.au/.
- The Social Policy Research Centre (SPRC) practice review released in May 2018 (Davy, Fisher and Wehbe, 2018) is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.
- Monitoring and evaluation fundamentals are explored in greater details throughout this training package. General evaluation information is available at the Better Evaluation website at https://www.betterevaluation.org/.

CAPACITY BUILDING FOR PEER SUPPORT

TWO: WHY COLLECT EVIDENCE?

SECTIONS:

- Why Collect Evidence Introduction
- Organisational Capacity Building
- Evidence Collection Purposes in the Peer Context
- In Summary
- Resources
- Self Study Questions

WHY COLLECT EVIDENCE INTRODUCTION

In our first Module, we explored our area of focus. This resource concentrates on gathering evidence within disability peer organisations. These support organisations are founded upon their ambition to build the individual capacity of peer members through such programs. The information they collect could be used for a variety of purposes. Our primary objective is to ensure that this resource can support and assist peer organisations, enabling them to keep doing their important work within our changing disability sector.

We will now delve a little deeper and explore why peer organisations can benefit from gathering evidence. Such support entities need to consider how they can increase their evidence collection skills and expertise to ensure they can continue to operate and grow their peer programs. We explore the reason that characteristics of the peer program environment lead to the pulling together of information becoming more important. This is true in both the short and longer term. The theory of organisational capacity building will also be studied and deliberated. This will make it possible for peer organisations to keep doing what they are doing well – Build the capacity of individuals living with disability.

ORGANISATIONAL CAPACITY BUILDING

Many peer organisations are user-led initiatives. They share a strong rights based philosophy and take form creatively out of need for information, advocacy and advice. Peer organisations operate in the highly convoluted and constantly shifting disability sector. Limited and at times nonexistent funding can characterise this and, as such, complicate opportunities for them to continue their good work. Many of these establishments have transformed from parent groups or other informal support groups into the peer organisations running today. With a history of enthusiasm rather than business acumen, it is likely many such entities struggle to marshal the resources they need to continue offering excellent peer programs at the coalface.

The NDIA and its ILC team greatly value the user-led movement and its role within the sector. The ILC grants, announced in December 2018, for organisations that meet the 'DPFO' ('Disabled People and Families Organisation') eligibility criteria, evidences this. Up to $19.9 million (including GST) ($18.09 million GST Excl.) in total was available in this first round. The grant announcement noted it was the first of several initiatives to support organisations across Australia led by people with disability, for people with disability. In their documentation, the ILC team stated that:

> *'Our preparation for this round shows that peer support is successful in building the skills and confidence of people with disability, with DPFO's an effective delivery vehicle. By building a robust network of DPFOs, who connect and support all people with disability in their community, we will see an overall increase in:*
>
> - *Motivation, confidence and empowerment to act*
> - *Independence and relationship building*
> - *Participation and contribution to community life and the economy.'*

FOR FURTHER INFORMATION – SEE https://ilctoolkit.ndis.gov.au/

In May 2018 the Social Policy Research Centre (SPRC) published a practice review of current peer support programs across Australia (Davy, Fisher and Wehbe, 2018). The review stated there was a lack of resources and information sharing opportunities across the peer support sector. Findings indicated the unmet need of a national support system or organisation to facilitate knowledge-sharing and a community of practice amongst peer support providers to provide resources and facilitate information sharing. The need for continued sharing of knowledge, and regarding strategies for meeting gaps in current peer support provision, such as evaluation, was identified. To date, a clear outcome from this recommendation has yet to emerge.

> **LINK - The Social Policy Research Centre (SPRC) practice review is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.**

Within this training package, we are directing our attention toward organisations which are delivering peer support programs that are, or could be, funded within the Information, Linkages and Capacity Building (ILC) grant program dispensed by the NDIA. It is assumed all of these organisations are underpinned by a deep-seated rights value base, together with an emphasis on developing the personal capacity of their attendees. However, we also need to think about ways that these valuable organisations can themselves build their own capacity. Given their history of evolving from a small group of passionate people living with disability, and frequently their family members and supporters, the volunteer led Boards and Committees operating peer organisations may not have significant experience in business or more formal community development. This presents the question, how do we preserve this focus on lived experience whilst also enabling these organisations to gather the information they need to illustrate their success, in anticipation of ensuring their longevity?

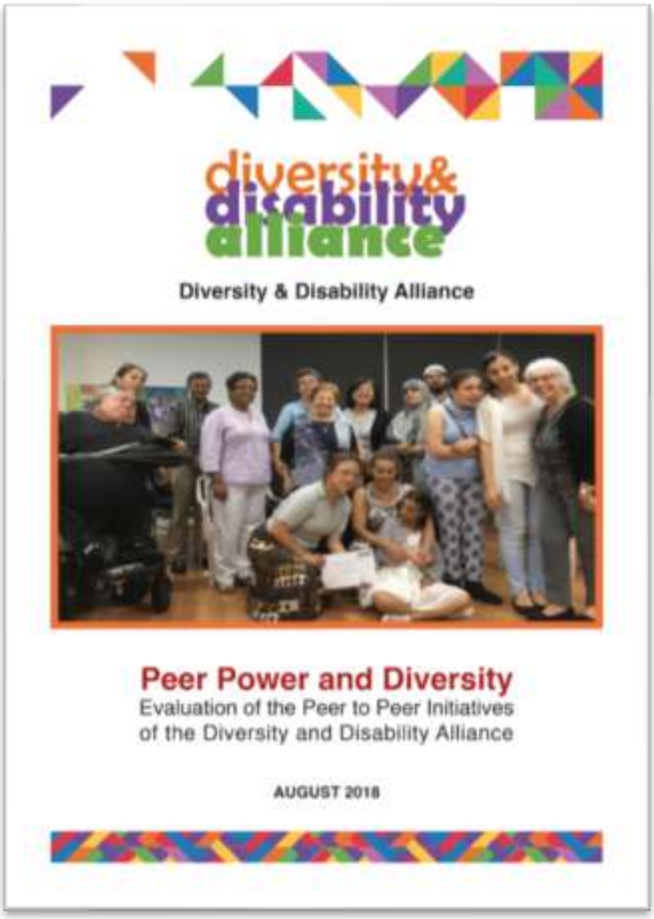
The SPRC practice review (2018) of peer support programs found that feedback and evaluation mechanisms were applied unevenly across the peer support providers they reviewed. While some gathered participant feedback informally and sporadically, others had developed formal strategies for eliciting feedback from participants and peer leaders. The report asserts that peer leaders found feedback and evaluation to be a useful way to track participant experience and garner required feedback/evidence. Despite this, many are unable to design and implement an adequate system. The review found that some peer organisations happen to have embedded expertise, while most find it challenging to cultivate formal mechanisms for capturing participant feedback, program data and outcomes. The review researchers concluded that peer organisations illustrated:

> *'a preference for qualitative, outcomes- based approaches to evaluation, given the flexibility of their peer support programs and the additional time it takes to establish peer networks within harder to reach groups in the community. Some mentioned the evaluation framework implemented by Purple Orange as an example of a positive blend of qualitative and quantitative evaluation measures. The Purple Orange e-bulletin 'Peer Support Network Stories: a round-up of good things happening in peer networks' is an example of a positive and engaging way to qualitatively capture peer support outcomes in a case study format rather than a standardised quantitative evaluation measure.' (Davy, Fisher and Wehbe, 2018, p.23)*

Some organisations also suggested that additional funding, alongside evaluation guidelines and resources, were required to engage in rigorous and adequate investigations. Overall, the review findings indicated that evaluation and feedback was an area in need of further investment to build on, and extend, current good practice within the peer program sector. Organisations need access to better information and resources for them to undertake the evidence gathering processes required. There needs to be a way that peer organisations are able to grow their expertise and devise methods for capturing organisational knowledge over time.

The review recommended working with those organisations that have developed formal feedback and evaluation mechanisms to formulate and expand upon guidelines and resources. For example, the Diversity and Disability Alliance has recently produced an evaluation of their work in this space (see below). The review proposed that enabling such sharing could build on current good practice and assist other organisations in this area. It was also suggested that the NDIA and its ILC program should undertake investment in peer evaluation resources.

> *'These findings indicate that evaluation and feedback is an additional area that could benefit from further resources to build on and extend current good practice.' (Davy, Fisher and Wehbe, 2018, p.23)*



This resource addresses some of these recommendations. The author of these materials was a family member (and Carer) of a person with acquired disability and developed the evaluation system within the Families4Families ABI Peer Support Network over a number of years, centred on her experience as an Accounting Academic specialising in strategic performance evaluation and with a Doctorate in that field. Resources developed have benefited enormously from the strong input from an editor with lived experience of disability and roles within peer support programs for many years. It is hoped that future investments will enable further learning opportunities in this space, including face to face sessions and access to ongoing consultancy support.

CAPSULE: PEER ORGANISATIONS WILL BENEFIT FROM HAVING ACCESS TO RESOURCES THAT ENABLE THEM TO BUILD THEIR ORGANISATIONAL CAPACITY, PARTICULARLY IN THE FIELD OF EVALUATION AND EVIDENCE COLLECTION. THIS IS AGREED BY THE NDIA (ILC) AND HAS BEEN CONFIRMED BY A RECENTLY PUBLISHED PRACTICE REVIEW.

SELF STUDY Q2.1:
Do you believe that your organisation has sufficient resources (funding, expertise and organisational capacity) to undertake regular and thorough evaluations of your peer support programs? Briefly outline the key resources you will likely use in any evidence gathering process.

EVIDENCE COLLECTION PURPOSES IN THE PEER CONTEXT

The need for team members delivering peer programs to have opportunities to learn more about evaluation and evidence gathering is clear. In the Social Policy Research Centre (SPRC) practice review discussed above, feedback mechanisms were developed internally by each peer support provider, and sometimes even by each peer support group. Whilst inefficient, the fact that so many individuals realised the importance of this information gathering illustrates the importance it holds in the peer context.

So, what motivates the development of evidence collection in the peer, user-led space? Is it the perceived needs of the NDIA as grant providers? Is it the formally stated grant requirements and workplan report needs? Within the peer context, the question of 'why undertake evidence gathering/evaluation?' results in similar answers to those of other types of organisations. There is usually a range of motivations, but Green and South (2006) succinctly summarise the four main reasons for conducting an evaluation as:

- Accountability;
- Learning;
- Program management and development; and
- Ethical obligation.

Gathering evidence can provide the information required to illustrate the benefits from program investment, ensuring the NDIA or other funders can see where their funds have gone. Internally, your disability peer support network may need to compete for its focus and resources with other projects. This means, you might need to evidence your program benefits and outcomes internally. Both of these relate to accountability purposes. Learning from unbiased evaluation evidence enables improvements, as well as, greater insight into what is working and what is not working across your programs. Managers of these initiatives also require relevant and tailored information to perform their duties effectively and to develop the programs successfully. The importance of acquiring wisdom from experiences and remedying any unintended negative consequences cannot be emphasized strongly enough. At the very least, you should perform evaluation to verify that your program is not creating any unintended harm.

Gathering evidence is not a task that should be left until the report is due. It is important to keep in mind that the planning of the evaluation needs to take place at the same time as the program itself is being conceptualised. Frequently within high pace and limited resource peer program scenarios, we think about gathering evidence at the end of the funding period, and then we will have scarce options for assessing outcomes. For example, a new member survey which measures participant perceptions of their self-esteem, confidence, NDIS knowledge etc. can be implemented so that we can then gather these measures again after a period of attendance, giving evidence of change.

The Chronic Illness Alliance (2015) produced an excellent literature review paper on evaluation within peer support programs for people living with chronic conditions. They found that:

> *'Apart from delivering quality programs that produce good outcomes, peer support groups require an evaluation framework that enables leaders to evaluate their program and benchmark with others. A comprehensive evaluation framework includes assessment of quality of the program, external perception, governance structure, strategic planning, source of continuing support, and referral pathways and processes.' (p.6.)*

The Chronic Illness Alliance website provides excellent resources (https://www.chronicillness.org.au/peer-support-network/) including this paper which is available at: http://www.chronicillness.org.au/wp-content/uploads/2015/09/PeerSupportforChronicandComplexConditionsLitRevMay2011Final_000.pdf.

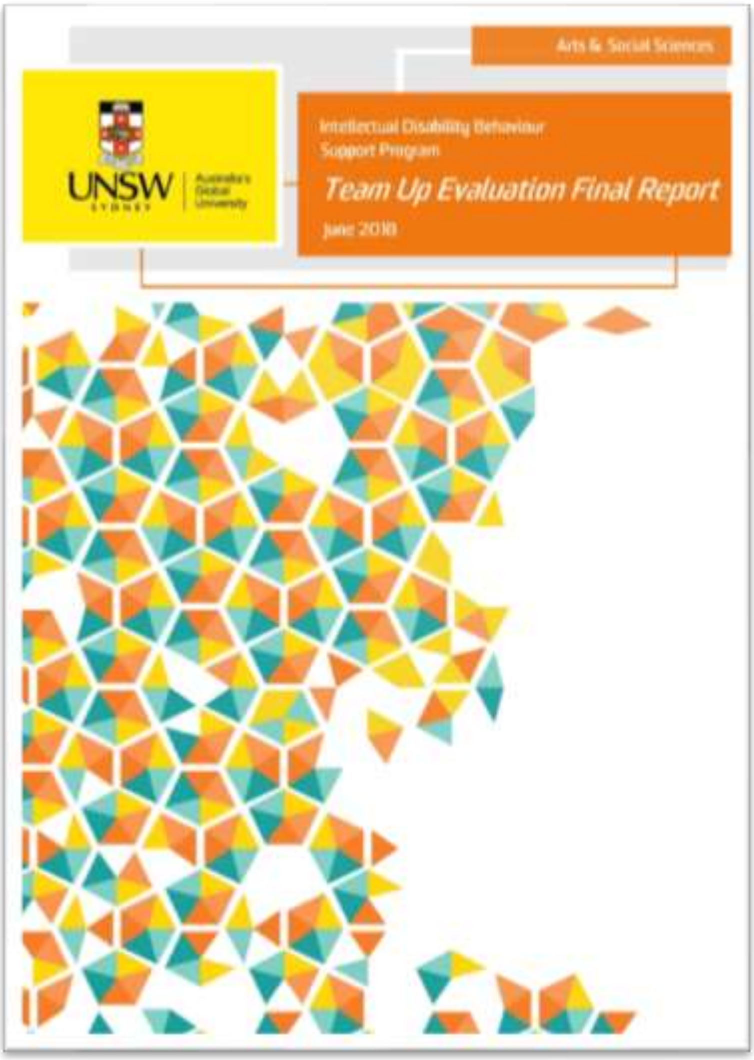
Evaluation enables us to determine if the project is making a positive contribution. It is vital to funding bodies, key stakeholders, participants and the community that the project has achieved what it set out to achieve. This gains credibility. In turn, assisting your endeavours around securing future funding. Having evidence of satisfied participants is also important to most team members. It possesses scope to boost morale, encouraging people to continue dedicating passion and energy to their program. Furthermore, evaluation is a tool for improving and furthering knowledge. You can learn:

- Which elements made your initiative run as intended?
- In what manner, can you replicate your program?
- How can you overcome challenges in the future?
- By what methods can you strengthen its sustainability?

From a bigger picture perspective, evidence gathered and reported also contributes to and builds upon, existing research to assist public policy, with influence. The SPRC practice review (2018, p23) of peer support programs included suggestions of a more in depth and systemic analysis:

> *'a full social impact assessment of personal outcomes for participants and the value-add of local groups to communities and to the NDIS rollout would be a really good evaluation process. But that would take a bit of resource to do that well.'*

It is clear, gathering evidence is vital within the peer program context. Such evidence and its collection needs to be factored in as one dimension of the program design in of itself. It must hold a role within the regular program management and development process. This makes it possible for user-led organisations to prove their worth amidst a competitive funding marketplace to key organisations, including the NDIA's ILC grant selection team. It means we will know what it is our members want and need and whether they are getting it. These skills will build the organisational capacity of your peer organisation and ensure you continue providing peer programs, to people living with disability, who need them. We want to guarantee we are learning, growing and sharing as a peer organisation, and to keep doing what we are doing well.



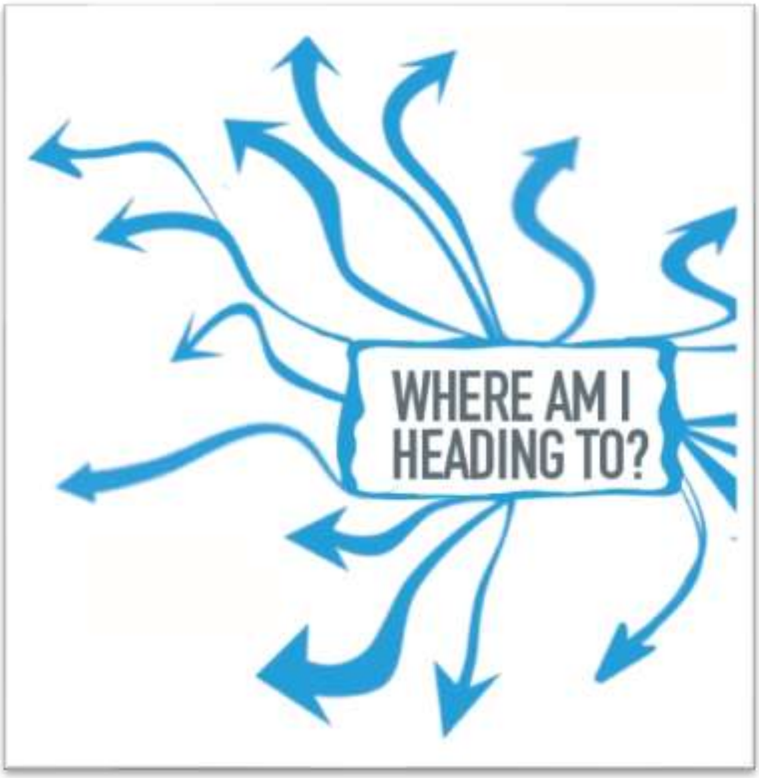
CAPSULE: PEER PROGRAMS NEED TO INCLUDE EVIDENCE GATHERING IN THEIR PROGRAM DESIGN FOR MANY REASONS: ACCOUNTABILITY, LEARNING, PROGRAM DEVELOPMENT AS WELL AS ENSURING WE ARE MEETING THE NEEDS OF OUR MEMBERS AND WITHOUT UNINTENDED NEGATIVE CONSEQUENCES. THIS MAY ENTAIL A SHIFT IN MINDSET INTERNALLY.

SELF STUDY Q2.2:
Does your organisation undertake regular and thorough evaluations of your peer support programs?
If so, please give a brief explanation of the reasons you do so.
If not, please give a brief explanation of the barriers you currently face in doing so.

IN SUMMARY

For many peer organisations, gathering the evidence they require has been a challenge. They have needed to be provided with additional resources that enable them to build their organisational capacity. This resource is a first step in addressing this need. Peer organisations will benefit from including information collection within their program design, as this will ensure they are in the best possible position for collecting the most valuable and important data. Such data will enable each peer organisation to illustrate the benefits their programs bring, illustrate outcomes, show effective/efficient use of funding and prove the importance of their user-led organisation within a changing NDIS marketplace. Without this evidence, user-led organisations are at risk of being squeezed out by large operators who have not spent years investing in learning the essential components of helpful peer support. Given this prospect, peer support organisations, neglecting to have a focus on evaluation, has the potential to constitute as a huge blow for the entire disability sector.

In the next Module, we jump right into the peer evidence-gathering journey. We start by asking you to contemplate your purpose. Where do you want your peer program to be? The aim is to enable you to consider the way that harvesting evidence can be used to guide your disability peer supports and help you to 'stay on track' on the road to where you want your program to be. Let us never forget; your peer program's 'track' is likely to be distinctive; this means you should tailor how you gather its evidence. Your disability peer support programs can gain strategic advantage from this journey, as can the disability community. This package strives to encourage you throughout this process as each peer organisation travels on its journey toward success.



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- LINK TO SPRC REPORT ADDED IN HERE - The Social Policy Research Centre (SPRC) practice review is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.
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CAPACITY BUILDING FOR PEER SUPPORT

THREE: THE BIG PICTURE STORY BEHIND COLLECTING EVIDENCE

SECTIONS:

- The BIG Picture Introduction
- Rights Based Foundation
- Principles of Good Practice
- Peer Support Program Purpose
- The Balanced Scorecard
- The Four Perspectives
- In Summary
- Resources
- Self Study Questions

THE BIG PICTURE INTRODUCTION

Without google maps, where would I know where I am? I might suspect that I am close to the sea by the smell, in the city from my view of concrete walls, and near lunchtime by the growl in my stomach. But how do I know if I am close to where I want to be? Well that depends upon where it is that you want to be…and when you want to be there.

Whether having a day out, running an organisation, or delivering peer support programs, ensuring success has a lot to do with knowing where you want to be. Knowing if you are getting close means you need to know where you are and if you are heading in what you consider to be the right direction.

The value of gathering evidence is that it will give you answers to questions such as:

- Where am I?
- Am I doing things well?
- What isn't working?
- Are my peer support group members getting what they hoped for?
- What can I do better?
- Is this working?
- Am I close to where I want to be?

The benefits gained by working your way through the process of collecting feedback and other evidence is not only the information you collect. The *journey* of making decisions about gathering evidence will give you time to consider the answers to important questions for your peer support program. These questions could include:

- Why am I doing this?
- What do I want to do well?
- What is it that my peer support group members want?
- What is it that we think is important?

Obviously, every peer support organisation will be wanting to build the individual capacity of their peer members via the peer programs they offer. But there are different ways to do this, and there are a lot of successful program methods and approaches. The people you would like to become involved with your peer support program could be as diverse as the variations existing within and between disabilities. Your peer support program needs to consider:

- How do you know what you are doing is the best approach?
- How do you consider all the different stakeholders involved in the peer programs you deliver?

The aim of this module in the learning package is to enable you to think about how the process of gathering evidence can guide your peer support program and help you stay on track. Remember, your peer program's 'track' is likely to be unique. Therefore, your way of gathering evidence should also be tailored to reflect this. Your peer support programs can extract benefits from travelling this journey and arriving at the 'evidence' destination. This package hopes to support you through these processes.

CAPSULE: THE PROCESS OF GATHERING EVIDENCE, AS WELL AS THE EVIDENCE ITSELF, WILL HELP YOUR PEER SUPPORT ORGANISATION TO BETTER UNDERSTAND WHERE IT IS CURRENTLY, AND WHERE IT IS THAT YOU WANT TO BE.

SELF STUDY Q3.1:
What are the key ways in which gathering evidence could help your peer support organisation?

SELF STUDY Q3.2:
Who will you be working through this learning package with? Are there key team members who you could travel this journey with?

RIGHTS BASED FOUNDATION

The National Disability Insurance Scheme (NDIS) has been created on clear principles based on the rights of each person living with disability across Australia. In 2011 the Productivity Commission Report stated that the existing disability system was underfunded, unfair, fragmented and inefficient and gave people with disability, their families and carers little choice and no certainty of access to appropriate supports. Based on this report, governments agreed to the introduction of the NDIS and in March 2013, the NDIS Act was passed (see https://www.ndis.gov.au/operational-guideline/overview). The main objective of the NDIS is to provide support to all Australians who acquire a permanent disability before the age of 65 which substantially impacts how they manage everyday activities. The NDIS provides participants with the reasonable and necessary supports they need to live an ordinary life. For example, some participants may be provided with funding to secure personal care or meal preparation, equipment, home modifications and transport assistance to enable them to participate in their communities.

OPTIONAL VIDEO TO VIEW - https://www.ndis.gov.au/ndis-april-enewsletter - LINK TO 'ORDINARY LIFE' VIDEO

This 'ordinary life' NDIS objective is all about ensuring that people with disability have the opportunity to experience a life encompassing the simple joys many other Australians take for granted. This includes a sense of belonging through positive relationships, achieving independence and choice, enjoying meaningful roles, and being an included and valued member of their community. As such, the NDIS has the opportunity to significantly change the life options available to people living with disability.

OPTIONAL VIDEO - FROM PURPLE ORANGE ON 'CITIZENHOOD' – SEE HTTPS://VIMEO.COM/287382724

The NDIS Act details the goals that the NDIA is striving toward achieving and these are largely based on Australia's obligations under the United Nations. Australia signed the *UN Convention on the Rights of Persons with Disabilities* in New York on 13 December 2006, yet the 2011 Productivity Commission Report illustrated that we were not meeting the requirements of the convention.

Peer Organisations operate within a disability sector dominated by the NDIS. Peer organisations are most likely to gain the funding essential to deliver peer support programs from the NDIA under projects such as the *Information, Linkages and Capacity Building* (ILC) Grants scheme. As such, peer organisations will likely be operating with the same clear foundation principles as the NDIS. The general principles which guide the actions of the NDIA when performing its functions include (see https://www.ndis.gov.au/operational-guideline/overview):

- People with disability have the same right as other members of Australian society to realise their potential for physical, social, emotional and intellectual development;

- People with disability should be supported to participate in and contribute to social and economic life to the extent of their ability;
- People with disability and their families and carers should have certainty that people with disability will receive the care and support they need over their lifetime;
- People with disability should be supported to exercise choice, including in relation to taking reasonable risks, in the pursuit of their goals and the planning and delivery of their supports;
- People with disability should be supported to receive reasonable and necessary supports, including early intervention supports;
- People with disability have the same right as other members of Australian society to respect for their worth and dignity and to live free from abuse, neglect and exploitation:
- People with disability have the same right as other members of Australian society to pursue any grievance;
- People with disability have the same right as other members of Australian society to be able to determine their own best interests, including the right to exercise choice and control, and to engage as equal partners in decisions that will affect their lives, to the full extent of their capacity;
- The role of families, carers and other significant persons in the lives of people with disability is to be acknowledged and respected;
- Positive personal and social development of people with disability, including children and young people, is to be promoted; and,
- People with disability should have their privacy and dignity respected.

User-led organisations and/or those running peer support programs are no doubt strong supporters of these foundation principles. As such, this resource has been developed with a strong rights-based underlying philosophy which will be clear throughout each module.

CAPSULE: PEER SUPPORT PROGRAMS CAN PLAY AN IMPORTANT ROLE IN ENSURING PEOPLE LIVING WITH DISABILITY & THEIR FAMILIES KNOW ABOUT THEIR RIGHTS. PEER PROGRAMS ARE FOUNDED ON THESE PRINCIPLES OF HUMAN RIGHTS.

SELF STUDY Q3.3:
In what ways does your peer support organisation and its peer programs embody a rights-based foundation? How would people outside your peer organisation know about your strong rights focus?

PRINCIPLES OF GOOD PRACTICE

The Social Policy Research Centre (SPRC) recently reviewed current peer support programs across Australia and, in May 2018, published a practice review (Davy, Fisher and Wehbe, 2018). This report provided a range of key benefits of peer support for participants which included (p5):

- Opportunities for information and knowledge sharing;
- Confidence and capacity building;
- Social connection and emotional support;
- Access to a safe space for sharing and problem solving;
- Access to positive role modelling and leadership form peers; and,
- Increased participation in community life.

A range of broader benefits from peer support were also identified in the report, including: the development of an informed and engaged disability community, and awareness and capacity building within mainstream services and the wider community about inclusive strategies and engaging with people with disability and their families.

SPRC REPORT: The Social Policy Research Centre (SPRC) practice review released in May 2018 (Davy, Fisher and Wehbe, 2018) is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.

One implication from this review was the finding that *'despite variation in peer support delivery, common values and principles of good practice peer support emerged' (p1)*. Research participants included a range of leading peer support providers from across Australia with expertise and experience in this space. They described good practice peer support as:

- Flexible – responsive to participant needs and preferences;
- User-led – led by people with disability and families based around lived experience;
- Focused on capacity building – predominantly for individuals;
- Semi-structured and purposeful – organised with a blend of issues and information-based content along with informal or unstructured forms of support; and,
- Community facilitated and based/linked – reflecting the need for the peer program to be mediated or facilitated through a community organisation to enable participant connections, and also for the program to have a focus on forging links with others in the community (other peer groups, mainstream organisations, services and government).

1. FLEXIBLE AND RESPONSIVE

Peer support delivery models are diverse and range from traditional groups of 5-15 participants, to online approaches, to large structured workshops (Davy et al, 2018). The practice review found that the ability of peer organisations to be responsive to participant needs and preferences is a key factor for their success.

This key 'good practice guideline' requires your peer organisation to be able to find out what it is your participants (members) want. The only way to do this effectively is gather evidence to know what it is they want, and whether you are meeting their needs. Having this knowledge will enable programs 'to respond locally and at a grassroots level to what works' for specific participants (Davy et al, 2018, p11).

OPTIONAL VIDEO - FILM ON RESPONSIVENESS OF PEER SUPPORT - https://vimeo.com/145590170

2. USER-LED

It emerged in the practice review that peer organisations shared common values and principles around good practice in this space and being user-led was one such component (Davy et al, 201). User-led peer support programs is described as being based on the lived experience of people living with disability and their families. Good peer support programs are driven and led by people with disability and families. Given this approach, it is likely to be uncommon for peer led organisations to have access to experts in areas such as 'evaluation' or performance assessment, hence the need for additional resources to be available to peer organisations (Davy et al, 2018).

OPTIONAL VIDEO - FILM ON PEER SUPPORT - https://vimeo.com/210181126

3. COMMUNITY FACILITATED

Peer support programs that are linked to a community organisation were found to be good practice in the recent practice review (Davy et al, 2018). This reflects the need for peer programs to be mediated or facilitated through a community organisation to enable participant connections, and also for the program to have a focus on forging links with others in the community (other peer groups, mainstream organisations, services and government). The strength of such a connection may be part of the peer organisation's successful approach, and thus part of our evidence may need to inform us about whether such links are maintained and/or improved over time. Again, gathering evidence can assist peer organisations to ensure they are focussed on one aspect of peer support good practice.

OPTIONAL VIDEO - https://vimeo.com/175482986 on overall benefits of peer support via community facilitated program

4. FOCUSED ON CAPACITY BUILDING

Good practice peer support programs have a strong individual capacity component embedded in the design, with training provided to peer leaders to increase their knowledge and confidence (Davy et al, 2018). Individual capacity building is about 'making sure people with disability have the knowledge, skills and confidence they need to set and achieve their goals' (NDIA, 2016). As noted by our editorial consultant, Jala, who has assisted in the development of this package, peer support can bring significant benefits to the individual members:

> *'Through Julia Farr Youth, I engaged in project work, consultancy and disability awareness, whilst simultaneously creating fellowship with like-minded peers with disability. This helped me grow as a person.' (Jala, December 2018)*

Our consultant notes that peer support group members do not all start from the same place. The playing field isn't always level for people living with disability, and the peer support space can provide a role in ensuring people are encouraged and supported to be the best versions of themselves possible. They can be provided with opportunities to develop their skills along with the confidence to believe in their abilities. Peer groups also provide members with the opportunity to be part of a 'team', providing opportunities to shift their lives beyond existing to one where they dream of making a real difference; not only in their own lives but more broadly across their community. Jala reflects on the role that her peer groups have had in her development and growth:

> *'Disability Peer Support has had such a positive impact on my life. Personally, in recent years, I have dealt with multiple physical health issues, these experiences were isolating for me. The support of my fellow JFY members and working with them offered me something to reconnect with. This re-engagement played its role in helping me to feel like myself again, as I journeyed towards becoming proactive and productive. JFA Purple Orange and JFY's belief in my skills helped me feel as though other people could see what I was capable of accomplishing. This is something, which came at a time when I was figuring out who I was and where I was going. Not feeling alone but as part of a team was something I had never really experienced before. They strengthened my belief that undertaking these kinds of endeavours are worth it.' (Jala, quote from PeerConnect Roadshow presentation, April 2018)*

The endeavours she refers to enabled her to build confidence and skills when her peer group first accessed, then presented, and finally delivered, their own Conference (as shown in the photos below). Jala was able to overcome the social isolation so prevalent for many people living with disability and gain a belief in her own skills and capacity through her peer group valued roles.

JuliaFarr
YOUTH
CONFERENCE
Adelaide 14-15 April 2014

Individual capacity building is a focus within the NDIA's ILC Framework (November 2016). It is one of the ILC Activity Areas, meaning it is an area that ILC will fund. ILC outcomes include that people with disability 'are connected and have the information they need' for decision making, and that they 'have the skills and confidence to participate and contribute to the community and protect their rights' (NDIA, 2016, p.7). The review findings assert that peer support programs with this focus embedded into their program design are best practice. As such, gathering evidence on whether your peer support program has an impact on individual capacity is likely to not only ensure your success, it is also likely to be relevant to the NDIA and their need to have evidence that the programs they fund give real outcomes to people living with disability.

5. Semi-structured

The practice review (Davy et al, 2018) found that peer support programs 'organised with a blend of issue and information-based content (at least at the beginning) and more informal or unstructured forms of support, to best engage participants' (p.12). This finding means that in many peer organisations, success may be related to how well information and issues are planned and delivered within the peer program, and whether participants (members) are given a range of options and ways to engage with their program. For example, has appropriate consideration been given to access and the ways it may have increased complexities for people living with disability?

We also need to be clear that access is far broader than a physical environmental concept. It is important that peer groups provide a 'culture of welcoming' and their core design elements are tailored to their intended audience. For example, if you are offering peer groups to people living with psychosocial disability or brain injury, do you ensure there are quiet places for members who may need to step out of the group to recharge? Do you offer easy English materials to members living with intellectual disability? Do you offer translated materials and culturally sensitive scheduling and groups for members from CALD communities?

The need for a blend for good practice requires your peer organisation know what it is your participants (members) want in terms of this mix of options, and the only way to do this effectively is with a tailored evidence gathering approach.

CAPSULE: PEER ORGANISATIONS USE DIFFERENT APPROACHES TO DELIVER PEER SUPPORT PROGRAMS WHICH AIM TO ACHIEVE RIGHTS BASED OUTCOMES. STUDIES HAVE SHOWN THAT EFFECTIVE PEER SUPPORT PROGRAMS ARE FLEXIBLE, USER-LED, SEMI-STRUCTURED, FOCUSED ON CAPACITY BUILDING AND ARE LINKED INTO, OR FACILITATED WITHIN, THEIR OWN COMMUNITY. GATHERING EVIDENCE WILL HELP PEER ORGANISATIONS TO KNOW IF THEIR PROGRAM MEETS THE GOOD PRACTICE GUIDELINES.

SELF STUDY Q3.4:
How does your peer program reflect the Good Peer Practice Principles outlined in the SPRC Report?

PEER SUPPORT PROGRAM PURPOSE

Many organisations struggle to determine what true success means. Are you aiming for happy workers, happy investors, happy customers, or perhaps all three? Even in large multinationals, maximising the bottom line (profit) is rarely the only aim. In most cases we will also consider other factors such as market reputation, growth, market share and customer satisfaction. In the evaluation literature, there is a range of great resources aimed at supporting this determination of what success look like. The Better Evaluation website provides an excellent overview on identification of success: https://www.betterevaluation.org/en/rainbow_framework/frame/determine_what_success_looks_like.

In social enterprises and the not for profit space, questions surrounding 'success' can be highly complex. For example, some issues to consider include:

- How important is keeping to budget versus investing in programs you aim to support?
- How important is the satisfaction of the team delivering your services and any volunteers you have on board?

Within community groups delivering support peer programs, similar issues appear. For example, your committee may need to choose between short term budgetary management and longer-term investments needed in training and program development to retain key staff and volunteers.

Peer support organisations specifically need to consider what a successful peer support program means to them. Answers to the question of 'peer support program purpose' is critical and will influence almost all aspects of the peer program design. In considering peer program success, team members need to think about:

- What is the purpose of running their peer support program?
- How will you know you are successful? Would this be signified by the number of people attending a group, the number of new group facilitators you have recruited, being on budget with your delivery costs, or perhaps all three? Are other factors more important?
- What about whether people living with disability enjoy attending their peer support group?
- Perhaps your organisation believes it is really important that members and people with disability drive the content and delivery of sessions?
- Is your program focussed on supporting hard to reach people and, in this case, perhaps accessibility and flexibility are considered essential factors in your success?

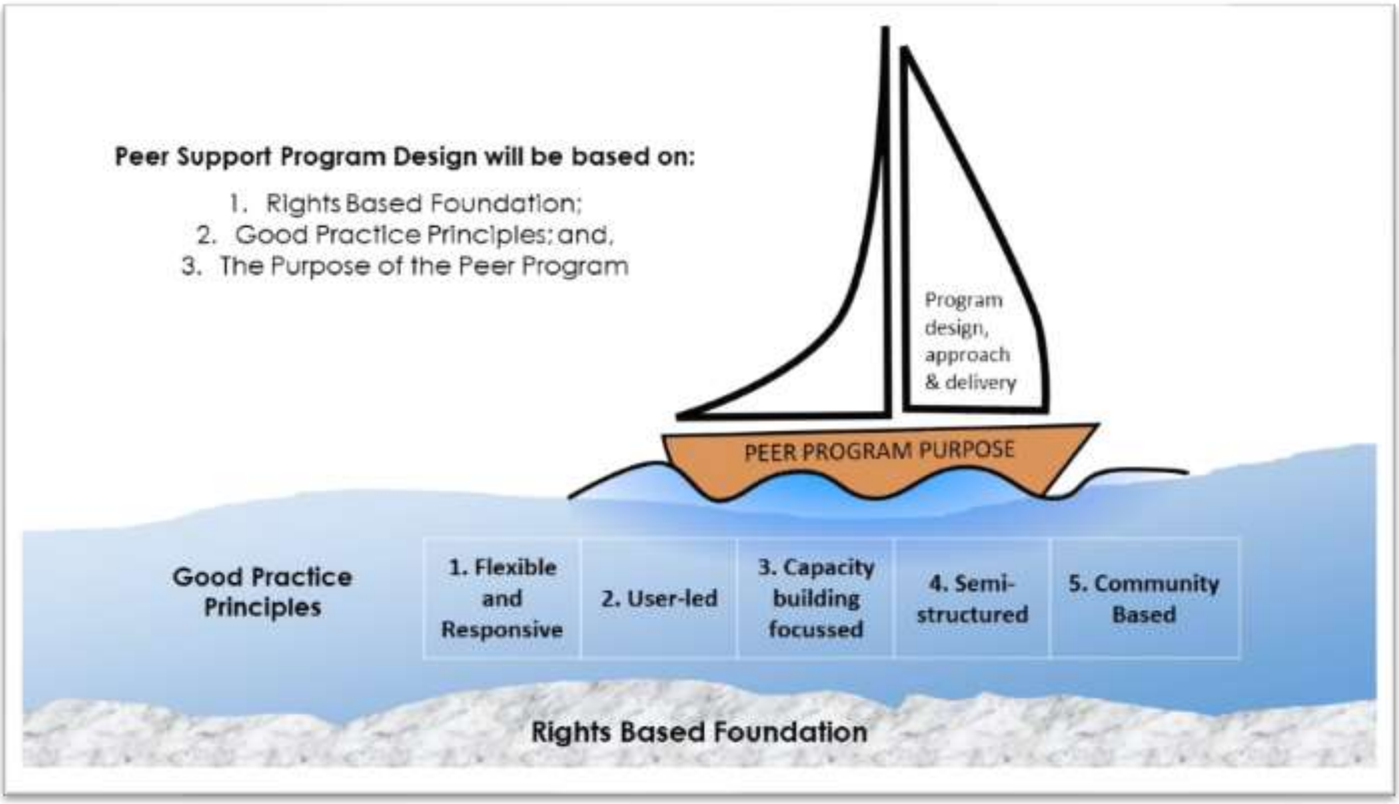
Obviously, each peer support program needs to consider their purpose at the starting point of this journey into gathering evidence. If you don't know where it is you want to get to, how could you possibly know if you are close or far away?

In this learning package we are focussing on peer organisations. These are the enterprises that are delivering peer support programs within the Information, Linkages and Capacity Building (ILC) grant program delivered by the NDIA. It is assumed that all peer organisations have foundations built on a strong right based philosophy, as outlined above. Therefore, they have a clear focus on building the individual capacity of their members/participants.

Yet even within this narrowed framework, each peer support organisation must still decide the specific purpose(s) of their peer support program. They need to clearly decide what they believe success means for their unique program. The fundamental questions peer organisations' face are 'where do we want our peer support program to be' and 'where are we now'? They determine this based on a vast range of considerations which may include their knowledge and expertise, team and member lived experiences, target audience and funding availability. Remember, the whole point of thinking about where we want to be is so that we have a compass to guide the journey. This compass will involve gathering evidence to know more clearly 'where we are at' in relation to the things we think are important; the things we consider aspects of our 'success'. We will be utilising this evidence to assist us in developing the ways in which peer organisations may be able to understand whether or not they are on the 'right track' as we take our gathering evidence journey throughout this learning package.

CAPSULE: PEER ORGANISATIONS NEED TO DECIDE WHAT SUCCESS MEANS FOR THEM SO THAT WE CAN GATHER EVIDENCE ON WHERE THEY ARE CURRENTLY AND KNOW WHERE IT IS THEY WANT TO BE.

SELF STUDY Q3.5 - Consider exploring the PeerConnect Kit guide on developing a value proposition (https://www.peerconnect.org.au/setting-and-running-peer-networks/establishment/why-would-you-set-one/) before asking yourself:
What is the main purpose of running your peer support program?
What is it that you are trying to achieve with your peer support program?
How would you define 'success' for your peer support program?



THE BALANCED SCORECARD

There are a lot of choices to be made on this evidence gathering journey. Having a structure to help us navigate through this process can be helpful, however selecting a model to guide any evaluation from the vast options available can be challenging (for example, a range of models are described on the Better Evaluation website, see: https://www.betterevaluation.org/en/rainbow_framework/define/develop_programme_theory). The structure needs to be adaptable to the specific nature of peer support delivery and be able to be 'tailored' to perfectly fit the needs of each peer support program. Having flexibility and adaptability are essential. Each peer organisation delivers a unique program to a specific target group and needs their own tailored system capable of gauging their measures of success.

The Balanced Scorecard is a system that has been successfully applied within the peer support program sector. The system enables peer organisations to design their own success measurement system based on their specific selected purpose(s). The purpose is the reason that the peer support organisation offers their unique peer support program. This purpose provides us with the basis of where we want to be, and will be unique for each program. This becomes central and then guides all other decisions relating to how we get there. This central focus on purpose becomes the foundation for our decisions about what evidence we need, and how we will gather and use it.

In summary, in any organisation it is important to consider what we mean by 'success'. Particularly in the NFP sector, this is far more complex than simply assessing financial profit or a return on investment. How do we know if your peer support program is performing successfully? It is only by knowing this that we will know where we want to be and therefore come up with ways to determine how far away we are.

The Balanced Scorecard (BSC) is a system founded on purpose that enables us to consider 'success' from a range of different stakeholder perspectives. The approach assists to deploy strategic direction, communicate expectations and measures our progress towards the chosen destination.

OPTIONAL LINKS HERE - The BSC model is featured on several sites for those wanting further details (https://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard, https://balancedscorecards.com/balanced-scorecard/) and a range of videos are available for viewing (including: https://www.youtube.com/watch?v=OZtNk__7Qyg, https://www.youtube.com/watch?v=M_IlOlywryw).

Using an ongoing system means that gathering evidence doesn't become an 'added chore' to delivering your peer support program. Rather, it becomes part of regular peer support program design and delivery, and it assists in guiding the decisions made at all levels which result in exactly how the program is run.

The four perspectives within traditional BSC design as applied in profit making businesses are: Financial, Customer, Internal Processes, and Learning and Growth. Within the peer support program space, the BSC needs to be adapted for use within the specific nature of peer organisations. BSCs in peer organisations are likely to be structured around the following perspectives:

1. Funders: Grant Providers, Sponsors & Donors—including the NDIA; and,
2. Members: People with disability (and perhaps their families) and your team (staff, volunteers).
3. Build (what resources, expertise and systems are needed to meet our program delivery aims?); and,
4. Learning (what do we need to invest in to ensure our longevity within the changing disability sector?).

We must consider the needs of our funders and what it is that they need from us in order to continue to support us—and our focus here will include the NDIA. We must also ensure we are meeting the needs of our members (or attendees/participants), that they are satisfied with the support we provide to them and this is likely to also correlate with the outcomes desired by our funders in terms of building their individual capacity.

OPTIONAL VIDEO – https://www.ndis.gov.au/communities/ilc-home ILC & capacity building film (NDIA)

To achieve your purpose, and meet the needs of your members, it is likely that your peer organisation needs to consider the ongoing need to build and retain its team members (staff and/or volunteers), ensure it has adequate resources and efficient systems in place. We know that some aspects of success are driven by the 'behind the scenes' investments which are also important and worthy of being part of our 'compass'. Finally, peer organisations, like any other, must prepare for the unknown. In the changing disability sector, this increasingly needs to be considered and addressed. We must consider what we need to be learning about what we do and how we do it to ensure we are best supporting our members and the needs of our funders into the future. We must ask ourselves if we are investing sufficiently in organisational learning via research, training and other growth to ensure we continue to be successful in the future (whatever that holds within this fast pace changing disability sector). To ensure longevity, peer organisations much consider these third and fourth perspectives.

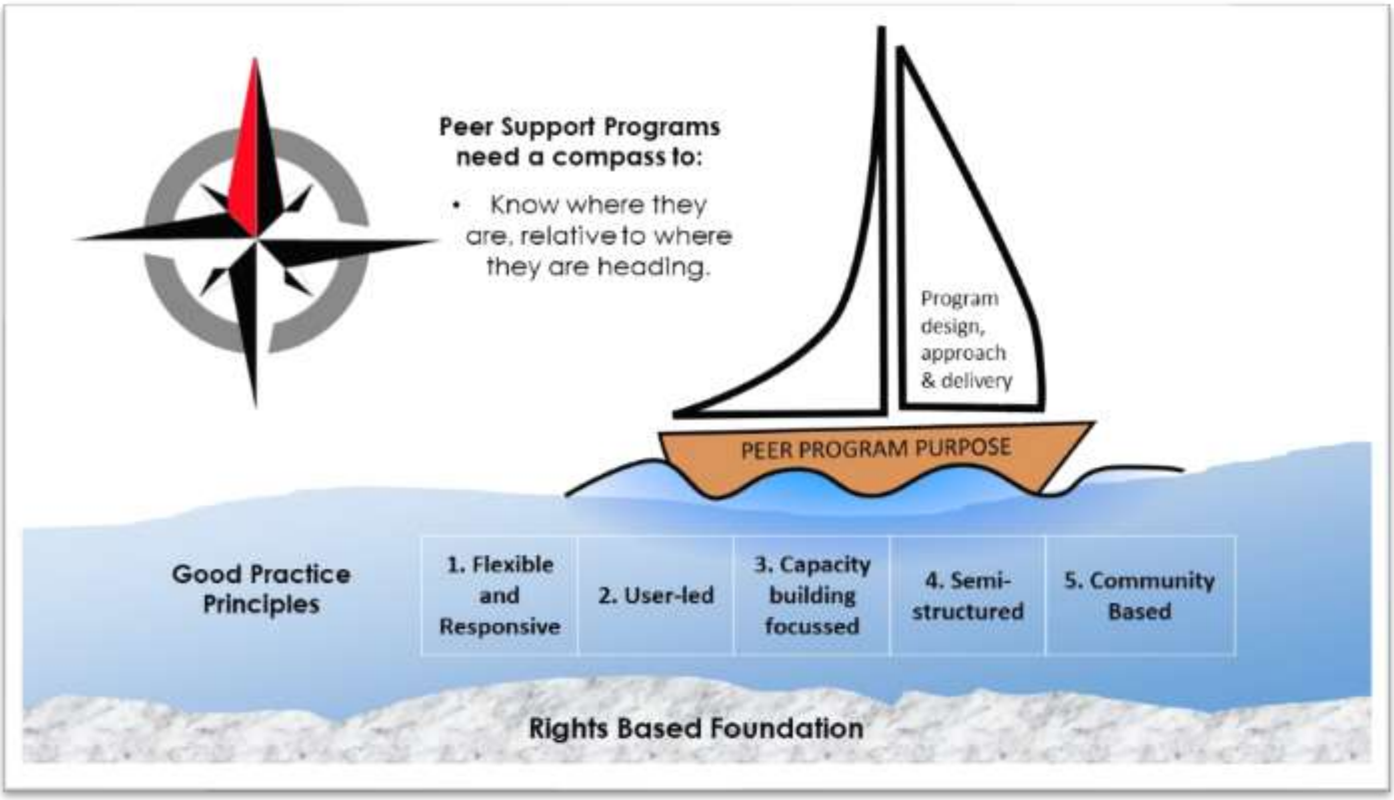
As you can see, the BSC enables the peer organisation to consider how it is currently performing (Funders, Members), how it may improve its processes, motivate and educate team members, and enhance systems (Build) as well as its ability to learn and improve now and into the future (Learning). Some of these considerations relate to success according to your central, chosen purpose, while others help you to consider the need for a long-term focus for ongoing success. An example of one peer organisation's BSC model is shown below:

The BSC model was developed by Drs. David Norton and Robert Kaplan some years ago (1993). The BSC is perfectly suited to our need for structure for the process of tailoring the evidence gathering process for each unique peer support program. While there are newer, more sophisticated success measurement systems available, the BSC structure is well suited to our needs. We are simply using the BSC as a framework for taking us along the journey of considering:

- First: where we want to be; and then,
- Second: ensuring we have a structure to guide evidence gathering so we can determine where we currently are.

CAPSULE: THE BALANCED SCORECARD SYSTEM CAN HELP PEER ORGANISATIONS ENSURE THEY ARE FOCUSSED ON THEIR PURPOSE. WITHIN THE BSC WE GATHER EVIDENCE ACROSS FOUR DIFFERENT SUCCESS PERSPECTIVES TO DETERMINE WHERE WE ARE RELATIVE TO WHERE WE WANT TO BE.

SELF STUDY Q3.6:
What are the four key perspectives of the Balanced Scorecard that you will use in your peer organisation? Briefly describe each of the four perspectives and then explain why each perspective is relevant for consideration within your peer organisation?



THE FOUR PERSPECTIVES

The Balanced Scorecard enables us to consider 'success' from four different perspectives which encompass the key stakeholders for a peer program: Funders, Members, Build and Learning. Let us now consider each perspective in a little more detail. Remember that the focus we are taking here is simply to put a clear framework around decisions relating to what evidence we need to gather to know where our peer support program is relative to where we want it to be.

1. FUNDERS: GRANT PROVIDERS, SPONSORS & DONORS

This perspective asks: to achieve our vision of success, how should we appear to our funders, both current and potential? What is it that they require from us in order to gain their support now and in the future? For peer organisations this includes the NDIA but they would also include any other sources of peer support program funding, such as sponsors, donors (financial or in-kind) and other small grants or government grant schemes.

As for the peer organisations that were selected for the NDIA's DSO Project (and its extensions, running from 2015-2018), all organisations selected for ILC Grant funding will be provided with set reporting and evaluation requirements from the NDIA as part of their grant agreements. Our focus here is not to duplicate such reporting requirements nor place additional onerous requirements on the peer support team. All peer organisations will want to ensure that their peer support programs are delivered in a way that builds individual capacity and are designed to achieve ILC Outcomes. If we consider these key components for our success, and of key importance to our funders, then gathering evidence about these outcomes is essential. Assessing your peer organisation's success from the funders perspective will therefore include gathering evidence on whether our members have increased capacity. Specifically, we want to know if participants (members):

- Have the skills and confidence to participate and contribute to the community and protect their rights;
- Are connected and have the information they need to make decisions and choices; and,
- Actively contribute to leading, shaping and influencing their community.

A range of other factors may also be considered important to our funders and may be objectives we need to gather evidence on to know if our funders consider us successful in delivery peer programs:

- Do we submit grant reports/outcomes on time and completed professionally?
- Are grant funds financially managed accurately and reports completed on time?
- Are Financial Reports and reconciliations for the program completed as requested and on time?
- Is the program's cash flow managed well, with investment earnings from excess funds sought?
- Are there objectives set by specific funders that need to be considered?
- Is there are certain number of groups we need to be delivering? If so, are we achieving that?
- If your peer groups deliver information and topics, are you developing relevant new topics regularly?
- Does your peer organisation meet any core requirements relating to Quality frameworks or standards?
- Are all essential policies in place and communicated widely?

This perspective asks: to achieve our vision of success, how should we appear to our funders (including the NDIA) and what do we believe is most important to them? Once we identify answers we will be then able to determine the specific evidence we need to gather and make plans to do so. This evidence will ensure our success according to our funders now and into the future, and can be fundamental to the success of grant applications in the future.

LINKS: The ILC recently announced a new approach to funding ILC programs. Read about the new approach at: https://www.ndis.gov.au/communities/ilc-home/ilc-investment-strategy.html including the downloadable 'Strategy' PDF available there also.

2. MEMBERS: PEOPLE WITH DISABILITY AND YOUR TEAM (STAFF, VOLUNTEERS)

This perspective asks: to be successful, how should we appear to our members (participants/attendees) and our team (including staff and any volunteers)? Members usually refer to both current peer support program attendees as well as potential attendees that the program is targeted at. Peer organisations want to know if their program(s) meet the needs of members (attendees/participants) and if they are satisfied with the support provided to them. This is likely to also correlate with the outcomes desired by our funders in terms of building the individual capacity of people living with disability.

To meet the needs of your members and achieve ongoing success, it is also likely that your peer organisation needs to consider the ongoing need to build and retain its team members. A peer support good practice requirement is being user-led and delivered based on the lived experience of peer facilitators and team members. Ensuring team members are retained, recruited and that there is a focus on building their capacity also, is likely to be essential components in the ongoing success of the peer support program (see, for example, the video on running and building peer groups at: https://teamup.org.au/resources/).

Assessing your success from the members perspective will include gathering evidence on whether members' and our team's needs are being met by the peer support program. The sorts of things that members are likely to want from their peer support program include:

- High quality, relevant programs which are easily accessible due to no waiting lists or fees to join;
- Information, education and upskilling via our topics, website and other resources;
- Referrals that are accurate and timely;
- Longevity of the network ensuring members can count on us in the longer term;
- A sense of belonging fostered via friendly and welcoming team members; and,
- Feedback from members is sought, considered and utilised in program planning.

3. BUILD: RESOURCES, EXPERTISE AND SYSTEMS

This perspective asks: to be successful, what systems, processes, expertise and resources do we need to develop and build? Many peer organisations are user-led initiatives built creatively out of need for information, advocacy, advice and a strong right based shared philosophy. Operating in a highly complex and changing disability sector, with limited and at times nonexistent funding opportunities to continue to do their good work, it is likely that they will struggle to gather the resources and explore their processes and systems while pushing forward at the coalface. Yet such a focus is needed to be sustainable and to most effectively and efficiently use the limited funding available to deliver and grow successful programs.

Community groups struggling with limited resources may in fact be even more in need of a 'build' focus than larger for-profit organisations. They need to plan to be able to grow expertise and have ways of capturing organisational knowledge over time (see for example https://www.peerconnect.org.au/setting-and-running-peer-networks/keeping-network-engaged/what-do-when-key-organising-member-no-longer-part-network/ on succession issues). The peer organisation may also rely on volunteers, and so volunteer management and support methods need to be carefully considered and developed over time. More efficient approaches that do not negatively impact upon member outcomes will need to be innovatively designed over time.

Thus, the build perspective is focused on not only internal resources and processes. It also focuses on how things are done so as to continue to best meet the needs of members (participants/attendees) whilst simultaneously managing the efficiency and sustainability demands of their funders. Not all processes and systems will be important – but some will be critical to success. Each peer organisation will likely select unique build objectives that are considered most important within their specific program offering, and then select the ways they can gather evidence to monitor 'where they are at' in that area.

At the most fundamental level, this perspective asks 'what must our peer support program excel at' to meet our stakeholders' needs? Some of the options to consider may be:

- Is an enquiry management system for all peer network enquiries, emails and phone calls required?
- Is our IT infrastructure in need of further development (eg should we be using a new cloud server)?
- Do we need to undertake organisational system development membership management?
- Do we have an up to date and relevant Policy and Practice Manual (and is this shared routinely)?
- Should we consider more strategic financial planning to develop sponsorships and new revenue streams?
- Do we need to develop our programs more consistently, such as updating facilitator support materials and training opportunities for them?

4. Learning: Resources, Expertise and Systems

Rather than only looking back, the BSC enables the peer organisation to consider its ability to learn and improve today and in approaching timeframes. This perspective asks: to be successful now and into the future, what does the peer support program and its team need to learn and improve? Considering your own peer organisation, what is it that you need to be great at to ensure your longevity and success within the changing disability sector? Organisations operating in the competitive NDIS marketplace don't always know what is ahead. Being good 'scouts' and 'prepared for anything' is what we are aiming for here. For example, in December 2018 the NDIA ILC team announced a new investment strategy (see: https://www.ndis.gov.au/communities/ilc-home/ilc-investment-strategy.html). Are there ways you're your peer organisation could have prepared for this market shift?

This perspective asks: to achieve what success means to us, what should we be investing in to ensure we continue to learn as an organization and be prepared for future environmental changes. Considerations could include:

- Does our peer program develop leading edge materials with new topics developed regularly?
- Do we have sufficient record keeping to ensure we retain knowledge when key staff depart?
- Do we have a national profile in this space?
- Are we applying for new program grants on a regular basis?
- Do we explore organisational collaborations and links on a regular basis?
- Do we provide our team with regular, tailored training opportunities enabling them to grow and develop?
- Are we constantly exploring new peer group opportunities, locations and assessing member need?

In the fast changing NDIS disability marketplace, with changing member expectations, team investments are needed as staff and volunteers may be asked to take on dramatically new responsibilities, and may require skills, capabilities and technologies that were not even available previously. With an adequately skilled and motivated team who are supplied with accurate and timely information, your peer organisation will be able to continue to improve and create value.

CAPSULE: THE FOUR PERSPECTIVES OF THE BALANCED SCORECARD (BSC) PROVIDE A STRUCTURE FOR PEER ORGANISATIONS TO REMAIN FOCUSSED ON THEIR PURPOSE AND THEIR OWN CONCEPT OF SUCCESS, AND GATHER EVIDENCE ACROSS THE FUNDERS, MEMBERS, BUILD AND LEARNING PERSPECTIVES SO THEY KNOW WHERE THEY ARE RELATIVE TO WHERE THEY WANT TO BE.

SELF STUDY Q3.7:

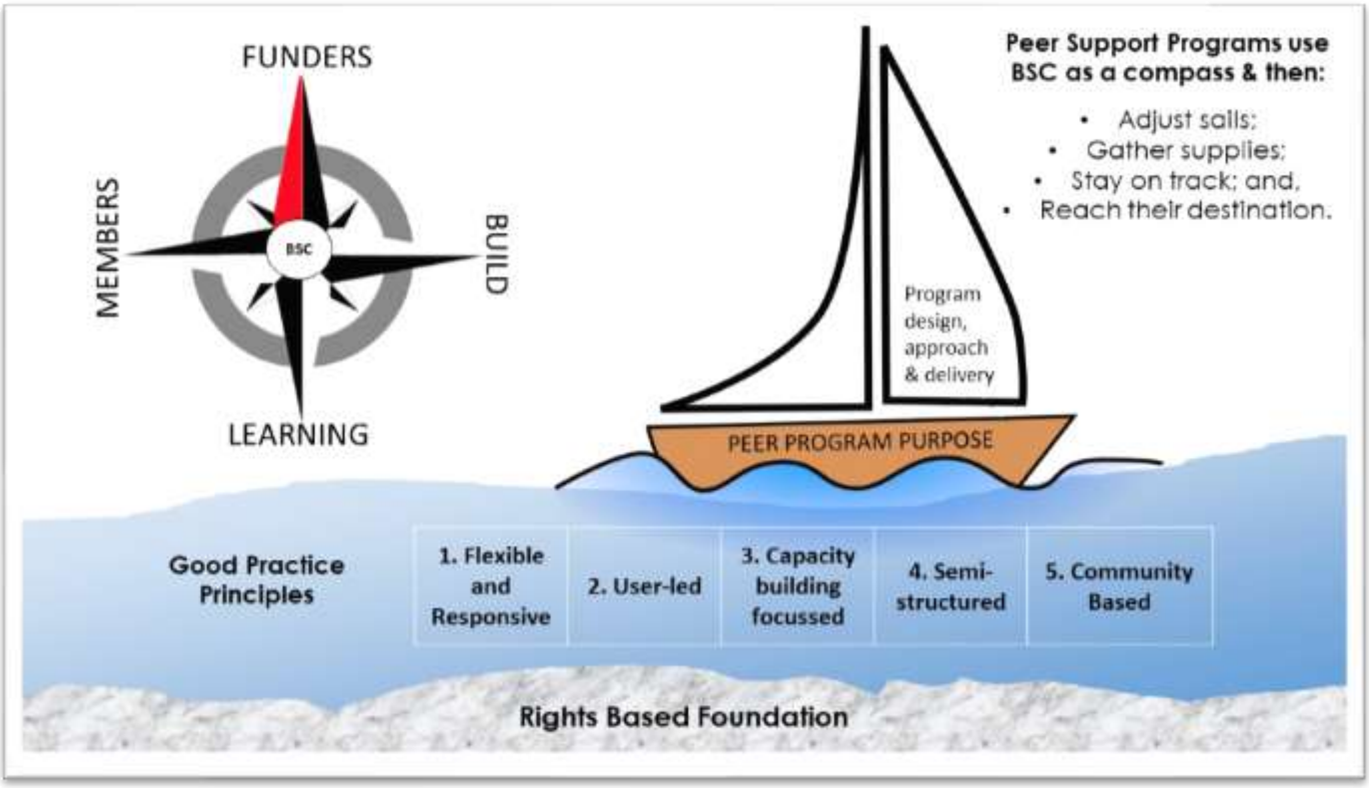
What are your primary learnings about the four perspectives of the Balanced Scorecard that you will use in your peer organisation (for example, the need to think about a range of different stakeholders)?

IN SUMMARY

Peer support organisations are founded on the desire to build the individual capacity of their peer members via their peer programs. Such programs are created on clear principles based on the rights of each person living with disability across Australia. Peer support programs were reviewed, and the Social Policy Research Centre (SPRC) report (May 2018) described good practice peer support as: flexible, user-led, focused on capacity building, semi-structured and community facilitated and linked. Given these foundations and good practice principles, peer support organisations need to consider what a successful peer support program means to them. Where is it that your peer programs want to be? Without a destination, we don't know where we are heading.

In understanding the role of evidence gathering, the starting point is the same for each peer organisation. What is the purpose of running their unique peer support program? Once this is determined, the BSC will enable peer organisations to gather evidence about where they are relative to where they want to be based on their own unique purpose and concept of success. The BSC asks the peer organisation to consider how it is currently performing (Funders, Members), how it may improve its processes, motivate and educate employees, and enhance systems (Build) as well as its ability to learn and improve now and into the future (Learning).

We now move into section 4 where we will consider what evidence we need to gather in order to understand where we are currently, and how far we have to our destination.



RESOURCES

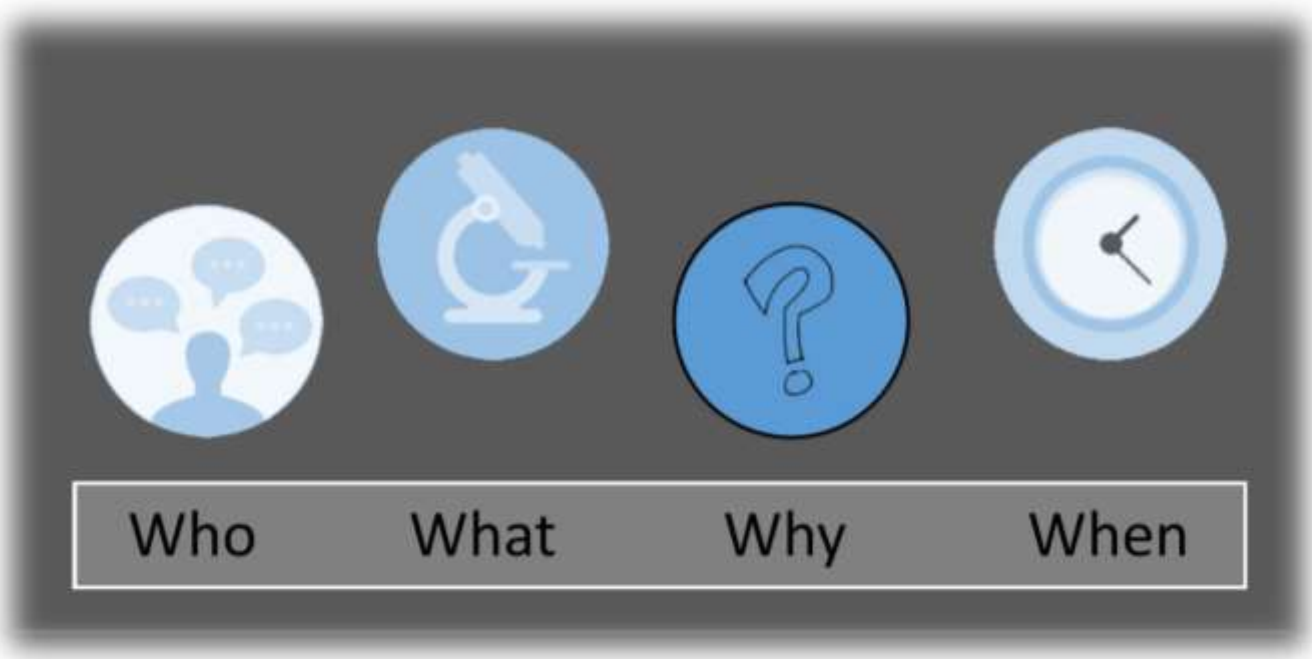
- NDIS objective, see: https://www.ndis.gov.au/operational-guideline/overview.
- See NDIS newsletters for additional information on the 'ordinary life' concept (https://www.ndis.gov.au/ndis-april-enewsletter).
- Refer to JFA Purple Orange website for additional information on their Model of Citizenhood (including film available at HTTPS://VIMEO.COM/287382724).
- NDIS general principles are available online: https://www.ndis.gov.au/operational-guideline/overview.
- Davy, Fisher and Wehbe (2018), The Social Policy Research Centre (SPRC) (add link to PDF here).
- Peer support films showcasing the good practice principles are available at:
    - https://vimeo.com/145590170
    - https://vimeo.com/210181126
    - https://vimeo.com/175482986
- NDIA ILC Framework and details is available at: https://www.ndis.gov.au/communities/ilc-home including a film on ILC & capacity building. In addition, the ILC recently announced a new approach to funding ILC programs which can be read about here: https://www.ndis.gov.au/communities/ilc-home/ilc-investment-strategy.html (and LINK Strategy PDF here also).
- The PeerConnect Kit contains information on developing a value proposition (see for example: https://www.peerconnect.org.au/setting-and-running-peer-networks/establishment/why-would-you-set-one/) and has other Quickguides on peer program purpose.
- Training plans and information within the NSW Disability Alliance can be seen at: https://www.peerconnect.org.au/peer-network-stories/nsw-disability-alliance/.
- Information on capturing organisational knowledge over time - see https://www.peerconnect.org.au/setting-and-running-peer-networks/keeping-network-engaged/what-do-when-key-organising-member-no-longer-part-network/.
- The BSC model is featured on several sites for those wanting further details, including:
    - What is the Balanced Scorecard? - Balanced Scorecard Institute, see: https://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard.
    - What is a Balanced Scorecard? A short and simple guide for 2018. – see: https://balancedscorecards.com/balanced-scorecard/.
    - There are also a range of videos including: https://www.youtube.com/watch?v=OZtNk__7Qyg and https://www.youtube.com/watch?v=M_IlOlywryw.

Capacity Building for Peer Support

Four: Why, What, Who and When of Gathering Evidence

Sections:

The Why, What, Who and When Introduction



Peer support organisations have strong rights-based foundations and are based on the desire to build the individual capacity of people living with disability. The Social Policy Research Centre (SPRC) report (May 2018) reviewing peer support programs described good practice peer support as: flexible, user-led, focused on capacity building, semi-structured and community facilitated and linked. Given these foundations and good practice principles, peer support organisations need to consider what a successful peer support program means to them. As everyone will know, without a clear destination, we won't know where we are heading. A clear destination enables us clarity about the direction we want.

The Balanced Scorecard (BSC) was then introduced as a way of understanding where we are heading and then structuring our journey toward the destination. The BSC will enable peer organisations to gather evidence about where they are relative to where they want to be based on their own unique purpose, peer program design and concept of success. It asks the peer organisation to consider how it is currently performing (Funders, Members), how it may improve its processes, motivate and educate employees, and enhance systems (Build) as well as its ability to learn and improve now and into the future (Learning).

OPTIONAL LINKS - The BSC model is featured on several sites for those wanting further details (https://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard, https://balancedscorecards.com/balanced-scorecard/) and a range of videos are available for viewing (including: https://www.youtube.com/watch?v=OZtNk__7Qyg, https://www.youtube.com/watch?v=M_IlOlywryw).

In this section of the training package we move to considering where we want to be, what evidence we need to gather to understand where we are currently, and how far we have to our destination. This involves a series of steps and decisions that will be unique to your own peer organisation. However, the process of asking questions and gathering evidence to be able to answer them, will be a journey that all peer programs can benefit from.

WHY: DEFINE PEER PROGRAM VISION, MISSION AND STRATEGY

Our journey starts considering the concepts of Vision, Mission and Strategy as they relate to peer support programs. A peer organisation's Vision tells us where that organisation hopes to be in the future. A Vision is usually slightly out of reach, but it clearly tells us what that organisation believes is most important and its desired future location. In the peer support space, it usually relates to foundation concepts such as human rights, accessibility, inclusion, quality of life and life choices. For example, JFA Purple Orange has a vision 'to create a world where people who live with disability get a fair go at what life has to offer'.

The Mission tells us a little more about the approach the organisation is taking to arrive at that destination. It may define their organisation, its objectives and its approach to reach that hoped for location. In the peer support space, the Mission will often reflect the ways in which the peer organisation is heading toward their desired location. For example, JFA Purple Orange's mission is 'listen to, learn from and work alongside people who live with disability to develop policy and practice that makes a difference'. While the vision gives us the destination, the mission gives us some insight into the way they will be travelling on the path toward that location. Frequently not for profit organisations combine elements of both Vision and Mission to develop a statement of an organisation's purposes, goals and values.

Strategy is the way in which the peer organisation is travelling on the path. It is how the organisation aims to achieve its mission and arrive at its vision. The process of coming up with the organisation's strategy is via a process called 'strategic planning'. This activity is used to set priorities, focus energy and resources, strengthen processes, ensure that the team and other stakeholders are working toward shared goals, establish agreement around the desired destination, and assess and adjust peer program design according to its operating environment. Strategic planning can be a helpful process, but in this module we will assume this has already been undertaken at the organisational level.

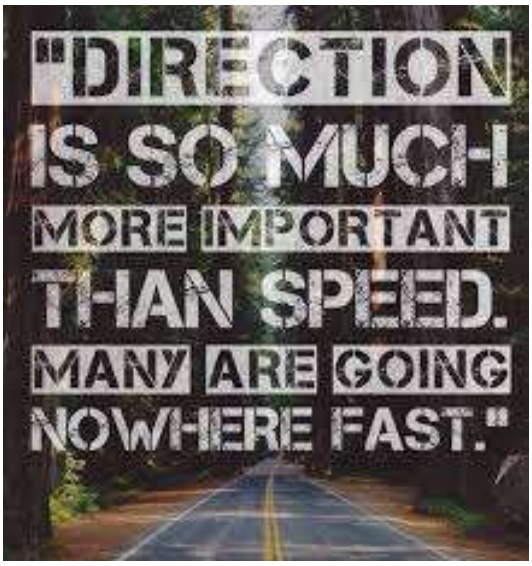
OPTIONAL LINK: The Better Evaluation website provides an excellent overview on identification of success: https://www.betterevaluation.org/en/rainbow_framework/frame/determine_what_success_looks_like.

VISION & MISSION: THE DESTINATION AHEAD

Whether selling homemade jam, running a school, or delivering peer support programs, ensuring success has a lot to do with knowing where you want to be. Knowing if you are getting close means you need to know where you are and if you are heading in what you consider to be the right direction. Obviously, every peer support organisation will be wanting to build the individual capacity of their peer members via the peer programs they offer. But what specifically is the key outcome they are trying to achieve? Where exactly do they want to be?

The Vision of a peer organisation tells us where they want to arrive at in the future. For example, VALID 'is committed to the vision of an Australian nation in which people with a disability are empowered to exercise their rights – as human beings and as citizens – in accordance with the United Nations Convention on the Rights of Persons with Disabilities'. The Vision of Families4Families peer support network is 'by 2020 anyone impacted by acquired brain injury and their families will live their best lives supported by our nationally recognised, leading-edge peer support programs'. The Vision is really a stated view of where the organisation hopes to arrive at in the future.

The Mission of peer organisations tells us more about how they want to get where they want to be. Down Syndrome NSW works with and represents 'people with Down syndrome to help them achieve their full potential in all life stages'. In the Families4Families peer support network, the Mission is to 'assist people with acquired brain injury and their families to build resilience and live a good life'. This is due to the acquired nature of brain injury, and the need for its members to 'bounce back' from their change in abilities and learn to embrace new life opportunities and options. VALID 'strives to realise its vision through a range of strategies that work to empower people with disabilities to become the leaders of their own lives'. As you can see, peer support missions are varied. Yet all are founded on a shared belief in the rights of people living with disability for full inclusion and maximum life options to enable their members to direct and star in their own lives. The Mission tells us how the peer organisation is going to arrive at their Vision, their desired destination.



The peer support program itself, delivered by the peer organisation, will usually be operating within this same Vision. It will be one of the programs offered by the organisation to achieve their Mission. In some peer organisations, it may be the only or primary program offered. In other peer organisations, peer support programs may be just a small part of their overall offerings to their disability community. For example, in addition to VALID's individual capacity building peer programs they offer group and community level programs to further their mission for inclusion, accessibility and awareness. Thus, when deciding on the Mission for your peer support program you will likely spend some time considering important questions such as:

- Why are we doing this?
- What do we want to do well?
- What is it that our peer support group members really want?
- What is it that we think is most important?

Spending time considering such questions will provide your peer program team with a shared focus and a clear understanding of where it is you all want to be – your destination ahead or Vision – and your approach to getting there – the Mission. This is an important part of the journey yet is beyond the specific focus on gathering evidence within this Module. As such, we will be assuming you are aware of your Vision and Mission and are focussing on the steps beyond these preliminary choices.

SELF STUDY Q4.1:
How would you define the following for your own peer program(s)?
a) Vision
b) Mission

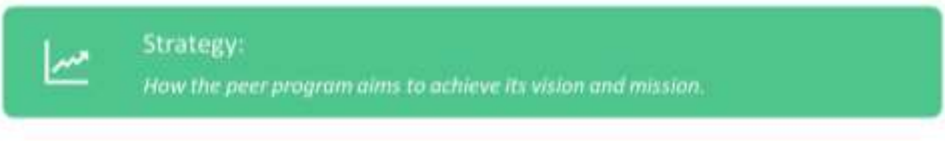
STRATEGY: THE PATH SELECTED FOR THE JOURNEY

As already noted, Strategy is the way in which the peer organisation is travelling on the path. It is how the organisation aims to achieve its mission and arrive at its vision. For example, if our Vision was full community inclusion for people living with physical disability across Tasmania, and our Mission was to offer a variety of services and programs building their individual capacity, the approach we take to achieve this is our strategy. Will we deliver peer groups, discussing information about the UN Human Rights Convention? Will we establish 1:1 mentoring programs, matching people based upon diverse knowledge/experience backgrounds? Do we encourage conversations about methods for overcoming barriers to inclusion? How do we make these decisions?

In the previous section *'The Big Picture'* we discussed the rights-based foundation for peer support programs. We also now know that there are clear good practice principles upon which we can base our program design decisions. As expressed above, The Social Policy Research Centre's practice review, published by Davy, Fisher & Wehbe (2018) illustrated the emergence of common values and principles for good practice peer support. Thus, when deciding upon Strategy, it is important to consider whether your approach reflects good practice and a rights-based foundation.

SPRC REPORT: The Social Policy Research Centre (SPRC) practice review released in May 2018 (Davy, Fisher and Wehbe, 2018) is available from: https://www.sprc.unsw.edu.au/research/projects/peer-support-practice-review/.

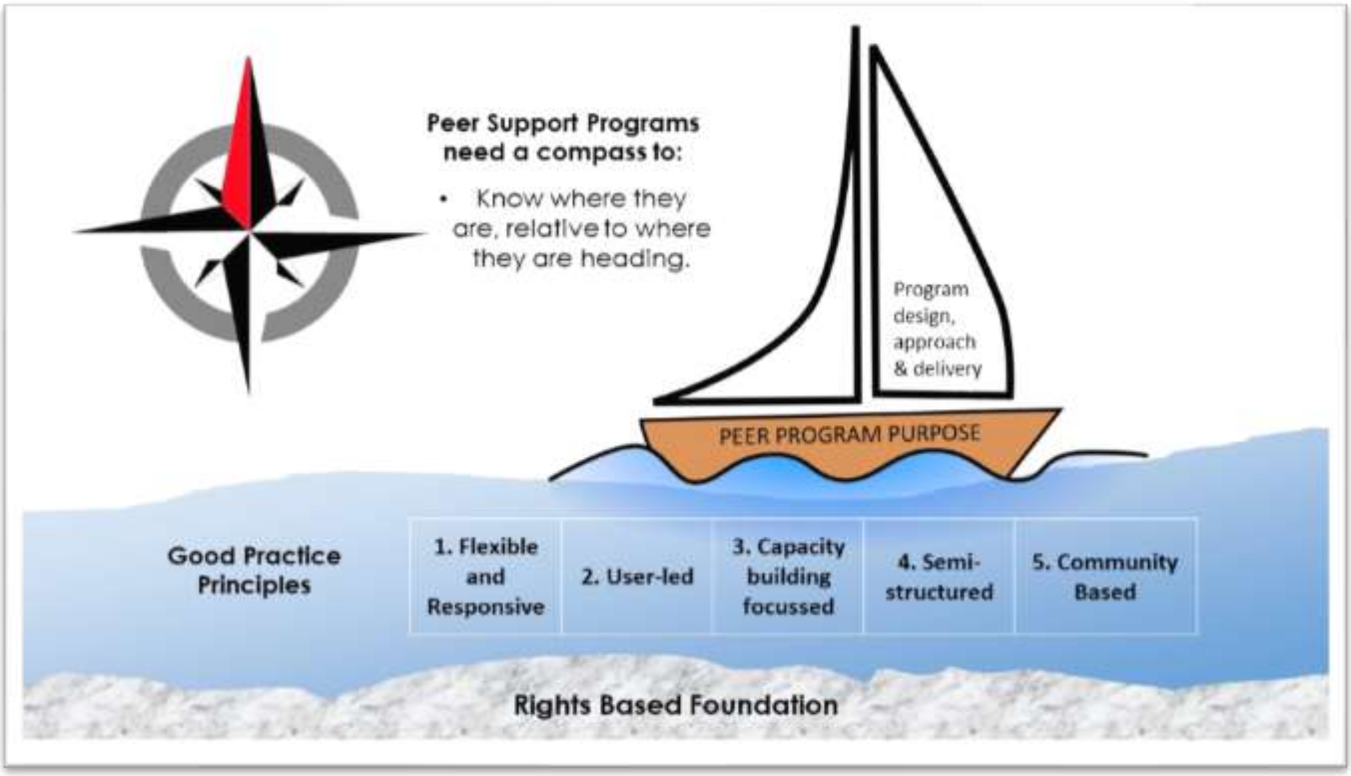
Another important consideration in Strategy will be the environment in which your peer organisation and the specific peer program will be operating within. From the peer program's perspective, this includes the internal organisational environment in which it operates, as well as the external environment and your wider community. The overall process of coming up with the organisation's strategy is called 'strategic planning'. This activity is used to set priorities, focus energy and resources, strengthen processes, ensure that the team and other stakeholders are working toward shared goals, establish agreement around the desired destination, and assess and adjust peer program design according to its operating environment. Strategic planning can be a helpful process, but in this Module we assume this has already been undertaken at the organisational level.



SELF STUDY Q4.2:
How would you define your peer program(s)' strategy; how will you achieve your vision and mission?

The BSC requires the identification of a vision, mission and strategy for the peer organisation. We know where we are heading and the approach we are taking to get there. Once these are clear, we are best placed to ensure we can identify the most appropriate signals for the journey ahead. We will be deciding what to gather evidence on based on these core elements. In other words, we will have a unique compass to use on the journey to the destination we have selected (Vision) via our approach taken (Mission) using the vehicle of our own design (Strategy).

The final stage is to then consider how you will know if the strategy is working. Have we made successful choices for our peer program? Are we happy with our approaches? Do we need to make adjustments, in response to changing conditions and member feedback? Is there anything we have forgotten to factor in? This step involves identifying goals and objectives for the peer support program. This is the next phase in our gathering evidence journey. Using our 'sailing' metaphor, have we used the right sail angle, have we navigated around the bad weather, and did we pack the right resources such as food and clothing?



Our evidence ‘compass’ should be able to tell us where we currently are, how far away we are from our destination and if our boat is the right design. This is the next phase in our gathering evidence journey.

Goals and Objectives:
Indicators of how well the strategy is working – are you getting closer to your vision?

Identifying and selecting your Organization’s Vision, Mission and Strategy for the Peer Program is really, the ‘WHY’ behind harvesting evidence. We want to know what direction we are heading in and the approach taken to get there. Keep in mind, your peer program’s ‘track’ is bound to be unique. Hence, you should also shape your way of compiling evidence to signify this. Each peer support program will develop its own compass for their respective journey. Your peer support programs can unearth benefits from embarking upon this journey and reaching the ‘evidence’ destination. This training package plans to support you through these processes.

Once the peer program has its organisation’s Vision and Mission identified, and strategy selected, we know where it is that the program is aiming and how we will be travelling there. This is really the ‘WHY’ behind gathering evidence – we want to know where we are heading in and the approach taken to get there. Remember, your peer program’s ‘track’ is likely to be unique and so your way of gathering evidence should also be unique. Each peer support program will develop its own compass for their unique journey. This package seeks to support you through the process due to the benefits your peer support programs can derive from both travelling this journey as well as arriving at the desired destination.

In this module of the training package, the aim is to enable you to consider the way in which gathering evidence as a process can guide your peer support program(s) and help you to 'stay on track'.

Capsule: The Why of gathering evidence refers to the Vision, Mission and Strategy of the peer program. The What of gathering evidence refers to the Goals and Objectives selected by the peer program, which we will next consider.

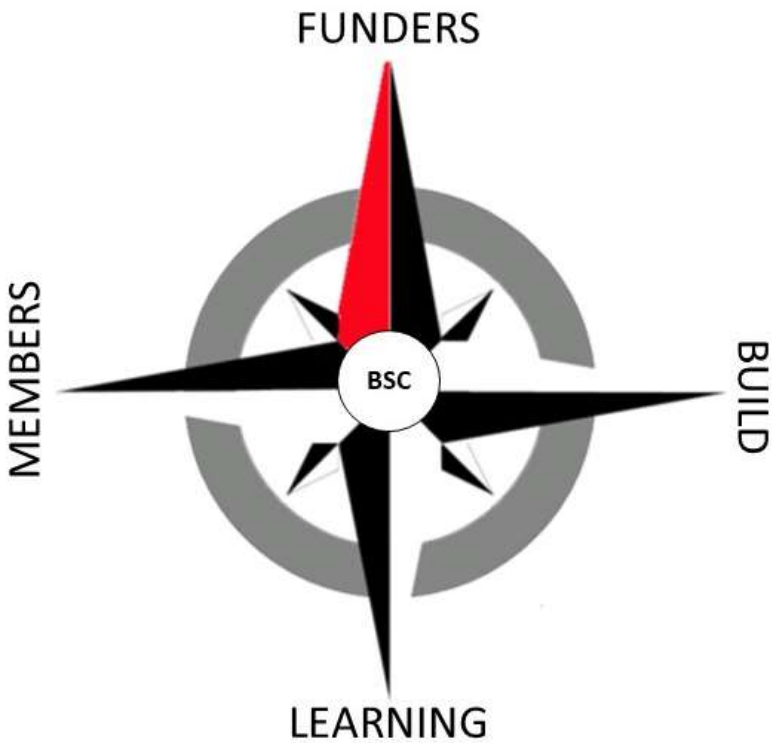
SELF STUDY Q4.3:
What is a goal and why are they important for you to consider in your evidence gathering journey?

What: Develop Goals and Performance Measures

We gather evidence because this information can work like a type of compass, giving us guidance on how far we are from our selected destination. To use the compass, we must know where we are heading and the approach we are taking to get there. Every peer program will have a different journey, though they will be founded on the rights of people living with disability and should consider the principles of good practice (Davy et al, 2018). Each peer support program will develop its own compass for their unique journey. The 'track' your peer program is taking will be specific to your program, therefore you will need to customize the way you collect your evidence. We need to have a system to individually tailor the compass to our needs through measures and goals we select.

Selecting performance measures that make sense to each unique peer program is a challenge. There are an enormous range of models and approaches to performance management, but in this resource we are using the relatively simple and intuitive Balances Scorecard (BSC). Developed by Kaplan and Norton (1992, 1996), this model has been found by many to be effective, particularly for ensuring that measures relate to the specific vision and mission of the organisation. The BSC, as with most performance management methodologies, requires identifying a vision, mission and strategy for the peer program. This ensures that the performance measures developed in each perspective support accomplishment of the peer program's strategic objectives. It also helps team members visualise and understand the links between the performance measures and successful accomplishment of strategic goals.

The original BSC translates an organisation's vision into a set of performance objectives distributed among four perspectives: Financial, Customer, Internal Business Processes, and Learning and Growth. In the peer program context, as we discussed in Module 3, we selected four more appropriate perspectives to use in our compass: Funders, Members, Build and Learning:



By using the BSC, a peer program can structure a compass which considers a range of dimensions and is able to monitors both its current performance (budgetary management, member satisfaction, and other) and its efforts to improve processes, motivate and develop team members, utilise the most effective resources, and still consider its ability to learn and prepare for an uncertain future. We must ask 'what must the peer program do well for this stakeholder/perspective to reach their identified vision'? For each objective that must be performed well, it is necessary to identify measures and set goals covering a reasonable time frame.

Taking each perspective in turn, the process involves considering the following questions:

1. What does the peer program need to provide (or deliver) to this stakeholder?
2. What does this stakeholder most value or need?

3. What benefits do we hope to achieve from this stakeholder?
4. How can we collect evidence on these needs and whether or not we are meeting them?

It is important that, for each perspective and each objective, we make sure they are related to the strategy and mission of the peer program. In other words, will achieving this objective help us to be closer to our desired future destination? Our unique 'compass' is designed by thinking about each perspective individually, and then bringing this all together. Figure (1) provides an overview of the BSC methodology to illustrate the design of each peer program's unique compass.

Once we have this approach clear, we can continue to delve further into the development of the strategic objectives that could sit within each of these perspectives. Understanding what needs to be done to complete the suggested matrices is relatively straightforward; developing the contents of each matrix is the hard part. Remember, when deciding on the sort of things you want to focus on, and ultimately measure, it is important to ensure that they link directly to the strategic vision of the peer program. When thinking about goals and their possible measures, consider whether (or not) achievement of the identified goal will help your peer program achieve its vision.

The steps you will take along each of the four BSC perspectives will involve:

1. Identifying key objectives within the perspective, ensuring we select goals that will help your unique program to meet its vision.
2. For each objective, at least one measure is selected and defined.
3. For each measure, the who, what and when of that measurement must be outlined along with a target measure (if that is relevant given the measurement method and approach).
4. Finally, to reach any targets, you will consider if you need any initiatives established to perform at this level.

Each objective within a perspective should be supported by at least one measure that will indicate an organization's performance against that objective. Define measures precisely, including the population to be measured, the method of measurement, the data source, and the ideal time-period for the measurement. These details will be used when we put together our evidence gathering program.

When developing measures, it is important to include a mix of quantitative and qualitative measures. Quantitative measures provide more objectivity than qualitative measures. If a quantitative measure is feasible and realistic, then its use should be encouraged as they may help to justify critical management decisions on resource allocation (e.g. budget and staffing) or systems improvement. Qualitative measures involve matters of perception, and therefore of subjectivity. Nevertheless, they are an integral part of the BSC methodology. Judgements based on the experience of funders, members, team members and community members offer important insights into peer program performance and its success. In fact, asking peer group members about their experiences was a primary method of collecting evidence used within peer programs delivered under the DSO (Disability Support Organisation) NDIA funded project.

CAPSULE: THE WHAT OF GATHERING EVIDENCE REFERS TO EVIDENCE ON THE OBJECTIVES SELECTED BY THE PEER PROGRAM AND THESE WILL BE STRUCTURED AROUND THE FOUR BSC PERSPECTIVES.

SELF STUDY Q4.4:
What do you understand is the role of the four key perspectives of the Balanced Scorecard for peer organisations?
How will they assist in the evidence gathering process?

OBJECTIVES ACROSS THE PERSPECTIVES

The BSC approach enables us to structure evidence gathering on our peer program around four perspectives. This moves away from traditional approaches of measuring performance based solely on financial criteria or member/customer satisfaction. We build the BSC uniquely within each peer program, because each peer organisation will have an individual vision, mission and strategy for achieving success. We will now explore the steps for establishing performance measures within the four perspectives of the BSC for your peer program.

FUNDERS PERSPECTIVE

FUNDERS TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?

In this perspective we ask 'to achieve our vision, how should we appear to our funders?'. Obviously being a peer organisation, a key stakeholder in this group is likely to be the NDIA. The NDIA offers a range of grant opportunities to peer organisations, including under the ILC (Information, Linkages and Capacity Building) area. But the NDIA isn't the only possible funder, and it is likely not the only possible source of financial support for a peer program. It may be possible to gain support from a local council, small grant schemes, state government grants and programs, private and philanthropic funds, community groups and even from individual donors. While we will of course consider what the NDIA may want from your peer programs, we should also consider what other funders such as these may value:

- Lions Club may offer an annual donation: they may want speakers available for their events;
- Private donors may want a way of publicly showing their support and/or knowledge of the benefits their donation can bring at the coalface;
- State Government programs may want evidence on savings that your peer program may bring to their Health budget; and,
- Local Councils may want evidence on the ways in which your peer program raise community awareness.

The NDIA have very clear ILC outcomes they want to see from any programs they will fund. The NDIA are clear about the goals for ILC investments and how peer organisations need to relate to them in any submissions. ILC outcomes can be viewed online (see: https://ilctoolkit.ndis.gov.au/outcomes/ilc-outcomes) and are discussed in more detail in the 'ILC Outcomes Discussion Starter' (available via link on that same webpage). This discussion starter explains that, when preparing an application for ILC funding, your organisation will need to identify how the activity makes a contribution to one or more of the five ILC outcomes and how you will gather evidence on this contribution. Grant applications should therefore include outcome assessment information, which will form one part of our 'Funders' perspective within the

BSC. In most cases, peer programs will come under 'Individual Capacity Building' for which the outcome objective is as follows:

> **Individual Capacity – activity outcomes**
>
> For "Individual Capacity" the key outcome statement is:
>
> **People with disability have the skills and confidence to participate and contribute to the community and protect their rights.**
>
> To measure progress against this outcome we will be looking for evidence of;
>
> - Increased skills and capacity,
> - Increased motivation, confidence & empowerment to act,
> - Increased self-advocacy, independence and relationship building,
> - Increased participation in community life, and
> - Increased contribution to community life.

It is important to note that peer programs funded as ILC activities will be required to monitor, evaluate and report on both *process* and *activity* outcomes. Gathering evidence on the *process* of delivering an ILC activity encourages a feedback loop between the peer organisation and their members. It enables peer programs to be aware of the need to adjust and refine their activity as it is being delivered. Gathering evidence on *process* outcomes enables the peer program to better understand the effectiveness of the program for people with disability as it is happening. The peer program gathers evidence to identify what is working (and any enablers for this success), what is not working as well, and what external factors (barriers) may be constraining the success of the program. So process really relates to what is being done and whether this is being effective in achieving the programs's goals. If it isn't, then understanding why and adjusting your delivery accordingly is all part of growing and learning as a peer support provider.

Monitoring and reporting of *activity* outcomes will be one aspect of the reporting requirements for receiving ILC funding from the NDIA. Activity evidence will relate to:

- **How much is being done?** This may include quantitative measures of peer program output (for example, how many activities conducted or how many interactions with people).
- **How well is it being done?** This is related to the quality of the activity and satisfaction of the users and may be measured with quantitative or qualitative data.
- **What was the change for peer members?** This is the difference that your provided activity (peer program) has had for your individual members, and could be evidenced by storytelling, case studies or pre and post surveys.

ILC funders want peer organisations to have the capacity to measure, collect evidence, and report on outcomes. Outcome evidence shows the ILC that your peer team have embedded an outcomes orientation for their peer program. Given that the ILC is a key potential (and perhaps actual) funder, such evidence is becoming increasingly important and valuable. Therefore, effective use of our 'compass' is of even greater importance within this operating environment. Essentially, unless your peer organisation is able to establish a system which captures activity and process outcomes for the funder 'ILC', it is unlikely you will be able to successfully operate in this space.

However, our funders focus is broader, not only directed towards NDIA and ILC outcome reporting/measurement requirements. We accept this is an important consideration for most peer programs but is also one that frequently changes. Over time, it has been adjusted regularly. Amending your compass whenever the ILC changes its tool or reporting requirements is not ideal. It would require greater team investments in terms of learning, training, change management and alike. It would also not enable you to see your journey over time.

Ideally your peer program needs a unique compass that will be used over the long term, providing you with the ability to see change in your own peer organisation's journey, and performance, over time. This evidence across time frames tells you about how your journey is progressing over time. If you created your compass based only on current ILC requirements, you would be potentially missing opportunities for internal tracking as you grow and develop. You may also not then have evidence that may be needed for other funding opportunities that appear over time if you take a narrow focus. Therefore, in this package, we suggest the inclusion of ILC outcomes as one of the important areas of objectives within the 'Funders' (and in some cases the 'Members') perspective(s). When considering the ILC as a key funder, we need to consider what evidence they will want to view when they are considering their national readiness or jurisdictional grants? Can you show a history of successful delivery and outcomes as well as highlight your organisational learning and knowledge already invested in?

ILC outcomes and grant requirements are not the only objectives to be included in this domain for most peer organisations. When considering the objectives to include in the 'funder' domain, we must ask ourselves 'how should we appear to our funders in order to achieve our vision'? We can consider various viewpoints of different types of funders, from donors to state government grants, to philanthropic funds through to the ILC. Each funder group should be considered even if your peer organisation is not currently accessing all of the funding opportunities available. As discussed, you want to create a long-term compass and therefore think about how you want to appear to a range of potential as well as existing funders. For example, what would major philanthropic grant fund selectors want to see? Can you capture your level of activity and impact within the social sector to share with others? What could an individual 'Mum and Dad' donor want to see in an organisation they donate to? How important is a clear message? What about inclusion and innovation? How much could illustrating your work with stories/case studies mean to them? Answering these questions facilitates selection of the most appropriate objectives for the 'Funder' perspective. Examples of objectives for the 'Funder' perspective are shown in the table below.

SELF STUDY Q4.5: Consider your own peer organisation:
Who are your key funders (both current and any future/potential funders)?
What are the key things you believe your funders want you to be able to show them?
What do they want to see to continue (or perhaps commence) supporting your important peer work?

FUNDERS	Objective (Ideas)

TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?	• Evaluation data is collected and provided according to ILC/Grant Evaluation Plan.
	• Accurate cash flow estimates enable investment returns.
	• Grant Funds are financially managed accurately and variance reports are used.
	• We are focussed and working toward achieving ILC Outcome(s) – such as:
	  ○ We provide high quality, relevant information at our peer group sessions; and,
	  ○ We offer a welcoming, safe and supportive environment to our peer members.
	• We submit NDIA Grant Reports and Workplans on time and they are accepted.
	• Workplan objectives are accurate and met.
	• Peer Group specific funds are expended as budgeted and reconciled accurately.
	• Administrative costs are kept under 20% as compared to program expenditures.
	• We regularly invest in peer program development, learning and group leading training.

SELF STUDY Q4.6:
Write two key objectives for the Funder domain for your own peer organisation?

The initial step is for us to select the key objectives for our peer organisation for this Funder domain. We then select the ways in which we will measure if we are meeting those objectives and make decision around this measurement. In other words, for each objective, we select a measure which should include how we measure this and how often we measure it. We then decide what our target performance is, and if we need to set up any new initiatives in order to meet this target. This is a fairly sophisticated process, but we are simply considering:

- **What 'thing' will show us if we are doing this or not** (and enable us to share this with funders)? For example, if our objective is that we keep our administrative costs under 20% of program expenditure, we could measure this from the two relevant categories in a financial report (our Profit and Loss or Income Statement).
- **How will we get some sort of understanding of that 'thing'?** We will take the total of our Administrative Costs and determine its proportion to the total of our Program Delivery costs.
- **How regularly do we need to check how this 'thing' is going?** Do we check this only annually, or do we do this each time the Board receives a Profit and Loss Statement?
- **What level do we aim for?** In this case, our objective clearly states our target performance is 20%.
- **Do we need any new initiatives in order to meet this target?** In other words, do we need to consider ways to reduce our overheads, or have some sort of program to do this over time?

Examples of objectives and the decisions which may follow are shown in the table below. You can now think about the ways in which you will complete this table within your own peer organisation.

FUNDERS

	Objectives	Measures	Targets	Initiatives
TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?	To keep administrative costs to 20% of program delivery costs.	*Profit and Loss Statement expense categories 'Administration' header and 'Program Delivery' header calculate a percentage.*	*20% Admin relative to Program Delivery measured annually in Annual Report.*	*Not required.*
	Accurate cash flow estimates enable investment returns.	*Investment earnings from term deposits are maximised.*	*CEO to report to Board at meetings on investment returns being >2.8% on prepaid revenue.*	*Not required.*
	We offer a welcoming, safe and supportive environment to our peer members.	*Surveys of peer group members asking 'do you feel welcome in your peer group?' and 'do you feel supported within your peer group?'.*	*85% of members agree they are welcomed in their group; 85% of members agree they feel supported in their group.*	*Peer Facilitator training program.* *Establish Facilitator community of practice where effective tools are shared.*

CAPSULE: THE FUNDERS PERSPECTIVE ASKS US TO CONSIDER HOW WE SHOULD APPEAR TO OUR FUNDERS IN ORDER TO ACHIEVE OUR VISION. THIS INCLUDES CONSIDERING WHAT THE NDIA ILC TEAM MAY WANT US TO GATHER EVIDENCE ON, BUT ALSO ANY OTHER POTENTIAL OR EXISTING FINANCIAL SUPPORTERS.

SELF STUDY Q4.7:
For the two key objectives for the Funder domain you developed for your own peer organisation (in Self

Study Question 4.6) please now also list (for each): at least one possible measure, two ways in which we could measure this and, for each way of measuring, how often you think it should be measured.

Members Perspective

This perspective asks: to achieve our vision, how should we appear to our members? For many peer organisations, this will also encompass their volunteers who are frequently also members. The decision about who is a member is the choice of the peer organisation and usually relates to their own organisation's fundamental purpose and vision. For example, JFA Youth has clear rules about membership being limited to young people, living with disability, from 18 years old, whose retirement occurs during the month of their 30th Birthday. It does not cater for family members or carers. In Families4Families, members include anyone living with ABI across SA that have either joined Families4Families or have yet to join (i.e. it includes their potential members).

Obviously being a peer organisation, in most cases members will be people living with disability and in many cases also their family members, friends and/or supporters. However, there are various sub groups of this audience that peer programs may cater to and this is certainly not limited to diagnostic specific categories. For example, there are peer groups aimed at the LGBTI* community who also happen to live with disability. There are very successful groups aimed specifically at the CALD disability community and various cultural groups within that community. The work of VALID illustrates that peer groups catering specifically at socially isolated and hard to reach people living with disability can he hugely beneficial and successful (such as groups from within the criminal justice system).

Historically the needs of our indigenous community has not been adequately considered within government policy and during system changes (see for example: https://www.theguardian.com/australia-news/2017/apr/12/australian-governments-have-failed-indigenous-peoples-says-oxfam). The First People's Disability Network (https://fpdn.org.au/) has been advocating for the NDIS to be different and to ensure that our first people have a strong voice in NDIS development, delivery and adaption for the needs of our indigenous disability community. Within this target group tailored and culturally appropriate peer supports are required which are likely to be designed very differently to other peer programs. This is essential to reflect the complex cultural needs and traditions of our first people. As such, while all peer programs should consider the needs of various community members, it is likely that our first people living with disability will require tailored peer support provided in innovative and tailored ways.

OPTIONAL LINKS: See films available at https://fpdn.org.au/our-films/ as well as a great film on an individual peer program utilising art here: https://www.youtube.com/watch?v=eEyZ4MZZ2lc.

The choice of target audience is often at the very core of peer program design, and is usually linked to the expertise, lived experiences and identity of the organisation itself as well as its purpose and vision.

SELF STUDY Q4.8:
Who are the target audience for your peer programs?
Do you have any membership rules that need to be considered in the gathering evidence journey?

If your members (actual/potential) have specific needs that impact upon strategy, what are they (note briefly)?

Once selected, it is important to understand your members and their needs very clearly. Rights-based foundations underpin peer organisations. The Principles of Good Practice lead program design; including the importance of user-led groups, delivering them. As such, it is highly likely many individuals involved in running peer programs to members, are members themselves. The different needs across your range of attendees should be thought about carefully. We must not assume participants have the same needs and wants, to join identical peer initiatives, just because they may live with a mutual diagnosis, or have another sole similarity. Those involved are likely to share some similar needs and differences around what they may be looking for from a peer support program. With time, it becomes important to ask your members questions about this.

While it is likely that peer organisations have excellent insight into their members' needs, it is important to also ponder why potential participants may not engage with the program. Within the peer space we can often become stuck in talking to those already convinced. In other words, we focus on advocating something to people who already share our convictions surrounding accessibility, choice and control and other core concepts underpinning the user-led movement. Reaching new people, yet to be persuaded, is more difficult. Having new members from groups which are challenging to connect with, gaining inroads into new communities, and new segments of our communities, is also highly valued. Therefore we perhaps don't want to only ask questions of existing attendees. How can we ask potential members questions? In what ways can we gauge community recognition of these programs? Is it possible that your overall growth provides indicators your programs are gaining new members from more difficult to reach locations? How can we pursue these inquiries? Thinking outside the square about members/potential members needs/wants is a key aspect of the BSC process within this domain. This is because 'one size doesn't fit all', when it comes to living with disability.

SELF STUDY Q4.9:
Write two key objectives for the Member domain for your own peer organisation that are not specifically based on ILC specific outcomes and/or objectives and instead are based on your specific target audience?

MEMBERS	Objective (Ideas)

TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR MEMBERS & POTENTIAL MEMBERS?	• Our members enjoy attending our groups and keep coming back.
	• Our members value their peer support group sessions.
	• Members are satisfied being a part of the peer organisation.
	• We are focussed and working toward achieving ILC Outcome(s) – such as:
	  ○ We provide high quality, relevant information at our peer group sessions; and,
	  ○ We offer a welcoming, safe and supportive environment to our peer members.
	• Our members and attendances at our peer groups are growing over time.
	• We bring in new members regularly, and they stay involved.
	• When members leave the group, their feedback is positive (ie they are leaving because they have got what they need from the group).
	• We regularly ask our members for their feedback and we use that in our peer program development, learning and group leading training.

Of course the NDIA, who are likely to be providers of funding to the peer program, should be considered within the member domain. As discussed under the 'Funders' domain, the NDIA have very clear ILC outcomes they want to see from any programs they will fund (which can be viewed online, see: https://ilctoolkit.ndis.gov.au/outcomes/ilc-outcomes). Some of these ILC outcomes require the gathering of evidence which relates to your members. In order to receive funding under ILC, your peer organisation's application will need to show how the activity makes a contribution to one or more of the five ILC outcomes for your evidence – as well as explaining how you will gather evidence on this contribution. As you can see, this will also need to be considered within the members domain, as the ILC outcomes relate to the way in which the peer program changes and impacts upon your members.

Finally, let's again remember that in the BSC, you are designing a unique compass to guide your peer program. The compass is ideally used over the long term, providing you with the ability to see change in your own peer organisation's journey, and performance, over time. The member domain collects evidence across time frames and tells you about how the journey of your members, and your membership, is progressing. If you create your compass only factoring in current ILC requirements (which are changing frequently), you would be potentially missing opportunities for internal tracking as you grow/develop. If the focus is too narrow, then you might not have evidence needed for other funding opportunities, which emerge in time. Within the member perspective the inclusion of ILC outcome measures is important but they are by no means the only components. It is also imperative to continue showing your level of activity:

- How many groups do you deliver?
- How many members have attended a group?
- Could volunteer facilitators come from your membership?
- Have any new members become regular attendees?
- Would (or do) your members refer their friends to the peer group?
- What topics/discussions do your members find most interesting/relevant to their needs?
- What do they not like?
- Have they encountered any negative consequences from their peer group involvement?

Your own program will have specific questions to respond to for allowing design decisions and adjustments to be made most effectively throughout the course of this process. The answers you assemble, via your measures, will guide you on your journey toward your vision.

Let's now consider, what do your members (current and potential) want from your peer program? In the Families4Families program, a volunteer, member-led committee decided that their members wanted the following from their local support groups which were operating across South Australia:

- Provision of high quality, relevant programs which they can easily access due to no membership waiting lists or fees to join;
- Information, education and upskilling via our topics, website and other resources;
- Referrals that are accurate and timely;
- Longevity of the network ensuring members can count on us in the longer term;
- A sense of belonging fostered via friendly and welcoming team members; and,
- Feedback from members is sought, considered and utilized in program planning.

Each peer organisation will have members with diverse needs/wants, and different program models. As such, your members' needs will be unique, something to take mindfully into account. Once clear, meeting them becomes your member perspective objectives.

SELF STUDY Q4.10:
Write another two key objectives for the Member domain for your own peer organisation based more broadly on ILC outcomes/objectives?

Once each member need, or member requirement, is identified, it is then expressed as an objective. Examples of these are illustrated in the table below, with indicators of each selected along with targets and any required initiatives.

MEMBERS

	Objectives	Measures	Targets	Initiatives

TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO MEMBERS & POTENTIAL MEMBERS?	We provide high quality, relevant programs that are easily accessible.	*Attendance at all sessions and events.* *Timely provision of session/event information flyers and group summaries and annual Calendar.* *Number of new members.*	*Average attendances of 15 per session, with 50 at special events.* *Annual attendances of 2000+ and growing.* *Calendars delivered on time.* *30 new members per year. Administrative team growth to ensure session management.*	*Early Support Program (visiting rehab units and family education programs) to continue and grow.*
	We educate, inform and upskill via our programs: local support group sessions, special sessions, newsletters, online presence and other.	*Number of sessions held.* *Number of eNewsletters sent out on time.* *Number of new topics.* *Member feedback on topics re relevance, information provided.*	*95% of sessions held, annual growth.* *100% of eNewsletters sent on time.* *2-3 new topics annually.* *Satisfied feedback on topic relevance and quality information.*	*Website update including new Calendar online established and maintained.* *Ongoing investment in administration team, including training.*
	We offer informal advocacy and advice resulting in referrals that are accurate and timely.	*Number of phone and face to face advocacy and advice sessions.* *Feedback from members re advice and referrals quality, accuracy, outcomes.*	*Number of calls recorded. Number of meetings recorded (base levels will then allow targets for both).* *Feedback from members to include asking about advocacy outcomes.*	*Support for phone advocate via team members 2 days each week.* *Recording advocacy activity.*
	Our network builds a sense of belonging fostered via friendly, welcoming and personable team members.	*Feedback from members re sense of belonging, welcoming of members.* *Feedback from member surveys*	*Number of team members trained annually.* *Satisfied feedback on sense of belonging from members and team members.*	*Annual training retreat or alternative training opportunities.* *Volunteer agreements actioned.*

CAPSULE: THE MEMBERS PERSPECTIVE ASKS US TO CONSIDER HOW WE SHOULD APPEAR TO OUR MEMBERS, BOTH EXISTING AND POTENTIAL MEMBERS, TO ACHIEVE OUR VISION. THIS WILL INCLUDES CONSIDERING ILC MEMBER OUTCOMES, BUT SHOULD BE SPECIFIC TO YOUR UNIQUE PEER PROGRAM.

SELF STUDY Q4.11:
For the four key objectives for the Member domain you developed for your own peer organisation (in Self Study Questions 4.9 and 4.10) please now also list (for each): at least one possible measure, two ways in which we could measure this and, for each way of measuring, how often you think it should be measured.

BUILD PERSPECTIVE

BUILD

TO ACHIEVE OUR VISION, WHAT DO WE NEED TO BUILD INTERNALLY?

In this perspective we ask 'to achieve our vision, what do we need to build internally?' In other words, to meet the requirements and needs of our funders and members, what systems, resources and skills do we need our peer program to be able to access? Any peer organisation would agree that having the right people facilitating peer groups is essential. Also important is the way in which learnings within the peer program are shared and retained within the team. To encourage this, organizers may like to contemplate answers to the following:

- What nature of program 'content', including discussion topics are in place?
- How are these developed and kept up to date?
- Do you have a secure database for recording members' attendances/personal information?
- Does your team have access to the right IT for their roles?
- How do you ensure your team is presented relevant/useful training opportunities
- Do these benefit members and/or funders

Does the peer organisation have an effective member database in which attendances and other important information is securely kept? Does the peer program team have access to the right IT to enable them to perform their roles effectively? What training is in place, or provided, to the team and how do we ensure this is relevant, useful and its benefits valued by the members and/or funders?

During this perspective, we think about the people, systems and resources we should build (or invest in), and ways to go about making this investment. Our key focus shifts from the external outcomes from our work, to questions about the internal processes, systems and the people that enable those outcomes. Having satisfied members depends upon having the right team performing their roles effectively. This team relies on having adequate systems in place to support their roles, such as incident reporting mechanisms, or a referral process of member concerns to senior staff/management for follow up. Appropriate IT and other resources, including accessible rooms and a user-friendly booking system is needed for success. Each peer program will have differing levels of importance placed on the various aspects of this 'build' perspective. For some, the focus will be on the team members themselves, while for others, such as an online group, may focus more energy on ensuring the right IT resources and web access is in place.

In addition to the more obvious objectives towards supporting team members, we must also factor in how your program's physical and intellectual property assets and utilised and managed. When it comes to your peer program, do you want to share your knowledge and expertise, or keep it secured internally? Do you have mechanisms to enable the adequate and successful sharing of your knowledge if this is your aim?

While we all want to focus on the delivery of the best peer programs possible, we need to also reflect on the importance of these underlying systems and established processes. Particularly when peer programs have been built within a community, user-led, volunteer group, the focus is unlikely to be on systems and business processes in the initial excitement of group delivery. The passion to support others and share experiences, learn from our peers and build our shared capacity can feel somewhat dampened by the cold reality of systems, policies and procedures. However, without underlying processes and resources, the eagerness of early innovators can only carry a program successfully in the short term and also places the program at risk of leading to negative or unintended consequences of members.

SELF STUDY Q4.12: Write two key objectives for the Build domain for your own peer organisation.

During any sort of evidence gathering process, it is important to ensure that we leave ourselves open to discovering negative or unintended results from our peer programs. Our collection of information needs to be open to things that we do not anticipate in order to fully grasp the impact of our peer programs. Whether they be positive or negative consequences, being aware of them will enable us to adjust our direction with greater accuracy due to our knowledge of them.

OPTIONAL LINK: Read about the importance of unintended consequences at: https://www.betterevaluation.org/en/rainbow_framework/define/identify_potential_unintended_results.

SELF STUDY Q4.13:
Identify one positive and one negative unintended consequence possible from the peer programs delivered by your peer organisation.
How will you ensure you are able to find evidence of each in your evidence gathering journey?

The build perspective asks us to navigate our journey with an eye not only on current funding requirements, and keeping your members satisfied, but also on the internal processes that are most important in ensuring these external stakeholders' needs can be met. For example, some objectives may include:

BUILD	Objective (Ideas)
TO ACHIEVE OUR VISION, WHAT MUST WE BUILD INTERNALLY?	• Our members database is professionally managed and secure. • We have an effective new member management system to ensure they feel welcomed and are provided with the right information. • Our IT infrastructure meets our needs as an innovative, growing charity provider. • Our facilities are secure, accessible, clean and well maintained. • We have an Evaluation Program in place to monitor, measure, assess and improve our peer program performance over time across all core perspectives. • We deliver high quality guest presentations which are managed & developed centrally. • Our Policy and Practice Manual guides our decisions, ensuring equitable access for all. • We focus on continually improving and developing our programs, including our support materials, research expertise and evidence, professional training resources and other materials or program resources. • Our peer program has clear policies and procedures that support, and protect, both our members and our team. • We have an effective enquiry management system for tracking and managing all website network enquiries, emails and phone calls. • We undertake strategic financial planning to develop sponsorships, new revenue streams and linked PR resources so they are all available when required.

Peer programs are distinctive and have been designed to meet unique needs. Therefore, a focus on build objectives will help your organisation to know where you are in terms of internal processes, systems and resources important to your program. As for the previous funder and member perspectives, the next BSC step is to take each of the factors we consider important and expressed them as objectives. Some options are presented in the table below, along with the indicators for their measurement, any relevant targets as well as any initiative that may be required.

BUILD				
	Objectives	Measures	Targets	Initiatives

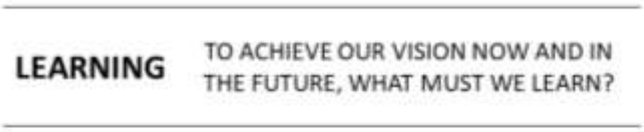
TO ACHIEVE OUR VISION, WHAT DO WE NEED TO BUILD INTERNALLY?	Our member database and new member management system are professionally managed.	*Percentage of new members receiving package in a timely manner.* *Establishment of CRM and training in its use.* *Percentage of attendances and contacts recorded in new database.* *New member satisfaction via survey feedback.*	*100% of new members receiving package.* *Number of volunteers trained in new CRM.* *Percentage of attendances and contacts recorded in new database.* *New member satisfaction rating increased.*	*New CRM planning to commence with completion 2018.* *Surveys for members developed.*
	Our IT infrastructure meet our needs as an innovative, growing charity.	*Development of Office 365 system across team.* *Volunteers trained in website systems.* *Member satisfaction with website and newsletters.* *Volunteer satisfaction from individual surveys.*	*Increasing number of volunteers trained in website systems.* *Percentage of members satisfied with website and newsletters increased.* *Volunteer satisfaction increasing over time.*	*Sufficient IT resources provided including ongoing IT Consultant role supported.*
	Our office & session facilities are a secure, safe and clean space.	*Feedback from members.* *Feedback from volunteers from individual surveys.*	*Feedback from members and volunteers re Hub is positive.*	*Hub cleaning and maintenance roster developed.*
	We provide excellent support to our volunteer team members including clear roles and responsibility descriptions.	*Establishment of volunteer role PBs & agreements.* *Use of agreements in as many roles as possible.* *Feedback from volunteers from individual surveys.*	*Feedback from volunteers regarding support and policies including positions and agreements.*	*Development of volunteer agreements.* *Admin support to enable the development of PBs.*

You will need an individualized compass, which remains relevant. This will provide you the ability to see change in your peer organisation's journey, and performance, as time moves forward. The evidence you collect relating to the build perspective will tell you about how your development of required internal resources, and likely their management, is progressing over time. A focus on systems, processes and resources can feel less important than a focus on ILC outcomes and member satisfaction. But remember, it is likely that investment and focus within the build perspective will lead to a lagged performance improvement in the Funder and Member perspectives. Building the mechanisms important for successful, consistent, equitable and efficient delivery of your peer program may feel less 'exciting', but their importance cannot be underestimated. This is particularly true for organisations managing federal government funds (eg ILC) and working with vulnerable people in organisations built on the passion and commitment of peers. The magic will be developing ways to keep the energy, focus and deep knowledge of those with lived experience at the fore of peer program development whilst also ensuring a professional delivery that meets the needs of the NDIA and members. The BSC enables you to gather evidence that captures all aspects of these (sometimes conflicting) perspectives and using that evidence to make the needed adjustments to your course.

CAPSULE: THE BUILD PERSPECTIVE ASKS US TO THINK INTERNALLY AND CONSIDER WHAT MUST WE BUILD IN ORDER TO MEET THE NEEDS OF OUR FUNDERS AND MEMBERS? THIS MAY ENCOMPASS SYSTEMS, PROCESSES AND RESOURCES INCLUDING TEAM MEMBERS AND THEIR EXPERTISE AND BE SPECIFIC TO YOUR UNIQUE PEER PROGRAM.

SELF STUDY Q4.14:
For the two key objectives for the Build domain you developed for your own peer organisation (in Self Study Questions 4.12) please now also list (for each): at least one possible measure, two ways in which we could measure this and, for each way of measuring, how often you think it should be measured.

LEARNING PERSPECTIVE



Rather than only looking back, the BSC enables the peer organisation to consider its ability to learn and improve now and into the future. This perspective asks: ‘to achieve our vision now and into the future, what must we learn?’. More specifically, what does the peer support program and its team need to learn and improve for the unknown? What do you think that your own peer organisation needs to be great at to ensure your longevity and success?

Organisations operating in the competitive NDIS marketplace don’t always know what is ahead. Being good ‘scouts’ and being ‘prepared for anything’ is what we are considering within this forward-looking perspective. Where we look to build our internal resources for successful member and funder outcomes in the future, in this perspective we are instead considering what investment we may need to make in the present to ensure this success continues. How can your peer program ensure it stays relevant to both its members and its funders? How can you ensure you stay on course over the longer term?

This is an important perspective, as it reduces our focus on short term outcomes, or meeting that next report deadline, to instead considering investments as a way of being prepared for our future. Perhaps we can think of this as being our ‘superannuation’ fund – we are investing today in the hope that we will gain rewards from this in the future. Alternatively, think of this as being a good Scout – and always being prepared.

What are some of the things we may consider within this Learning perspective? What about whether organisational, hard earned peer support knowledge is shared and retained? Do you want a national profile for your peer programs to enable you to more easily build members via referrals and be acknowledged as the peer experts in your specific diagnostic group? Is your peer program run collaboratively, which is a great way to ensure efficiency as well as garner new ideas and inputs? How many people within the peer program area have grant writing skills, and how often are grant submissions prepared?

Considering these sorts of questions may lead to the establishment of an internal mentoring program in order to ensure hard earned peer support knowledge is appropriately managed. Perhaps you can more easily justify investments in team member conference attendance and them providing presentations on your peer program? Maybe training or internal mentoring for team members in report and grant writing will be embraced? Each of these initiatives would likely not be considered under the more short-term objectives focused on within the build, member and funder perspectives.

We ask here: '*to achieve what success means to us, what should we be investing in to ensure we continue to learn as an organization and be prepared for future environmental change*'. This perspective allows us to consider our operating environment more intently. How will the shifts and adjustments that we see over time impact upon your unique peer program design and delivery? Will the new ILC approach be beneficial for your peer program? Is retaining a strong user-led focus likely to be an asset when competing against large service providers – or, more likely, how do we ensure that it is? How can we utilise our user-led history and strong focus on lived experience to prepare for the changing disability sector? Without a strong basis for collecting the right evidence with which to show our worth and benefits, there is of course a risk that user-led organisations may become challenged or even extinct. These are just some of the high level and fundamental questions that are to be considered with this Learning perspective:

LEARN	Objective (Ideas)

TO ACHIEVE OUR VISION, HOW & IN THE FUTURE, WHAT MUST WE LEARN?	• We have a trained, motivated and empowered team that are flexible and can work across roles. • We develop leading edge information topics and facilitator materials. • We explore new opportunities and develop new projects. • We grow our peer support networks/groups via a new group establishment process. • We have sufficient record keeping to ensure we retain knowledge when key team members depart. • We have a national profile in the peer and [add in specialization] space. • We apply for new grants and embrace new opportunities on a regular basis. • We regularly explore organisational collaborations and grow links over time. • We provide our team with regular, tailored training opportunities enabling them to grow and develop. • We constantly explore new peer group opportunities, locations and we have a focus on assessing member needs to enable the successful growth of new groups.

In the fast changing NDIS disability marketplace, with changing member expectations, team investments are needed as staff and volunteers may be asked to take on dramatically new responsibilities, and may require skills, capabilities and technologies that were not even available previously. With an adequately skilled and motivated team who are supplied with accurate and timely information, your peer organisation will be able to continue to improve and create value.

It is clear that funding such high aspirations could be expensive. Organisational learning investments may include training, mentoring programs, conference attendances and knowledge management systems. Yet the most important investment in this domain is likely to be relatively inexpensive – it is in the thinking and approach of the peer program team. Considering longer term issues is likely to involve a change of mindset within a team that is used to focussing on short term deadlines and endless scheduled group sessions. But taking the time to think about these longer-term issues is important, particularly when operating in such a fast-paced, rapidly changing environment as the Australian disability sector. Of course, thinking about investments to future proof your peer programs is also likely to improve short term performance. The NDIA ILC team love to see collaborations and plans to build peer group sustainability. Your members will appreciate feeling the security that comes from knowing their peer groups think long-term and won't stop just when they come to rely on them. The learning perspective is about the preparing for the future, but it is also about ensuring our user-led movement has increased security today.

SELF STUDY Q4.15:
Write two key objectives for the Learning domain for your own peer organisation.

The following table encompasses examples of objectives within the learning perspective, suggested indicators and targets, with some possible initiatives. Your team will intuitively know the concerns they have about future operations. What are they most worried about navigating? How can we best support them by addressing concerns, before they are active challenges?

LEARNING

TO ACHIEVE OUR VISION NOW & INTO THE FUTURE, WHAT DO WE	Objectives	Measures	Targets	Initiatives
	National and international conference attendances and	*Funding provided for conference attendance.*	*Sufficient funding provided for conferences.*	*Budgetary management for conferences is undertaken.*

NEED TO LEARN?	presentations are sought, secured and funded by our key team members.	*Number of research presentations, attendances and articles published.*	*Numbers of research items growing annually.*	
	We have a trained, motivated and empowered team including volunteers that are flexible and trained in multiple roles.	*Number of regular and new volunteers.* *Satisfaction, flexibility and motivation measures of team assessed via individual surveys.*	*Growth in all indicators, measured on an annual basis.*	*Training budget allowance for key team members.* *Volunteer survey development.*
	Our organisation develops leading edge information topics.	*Number of new topics.* *Number of new topic deliveries annually.* *Member feedback.*	*Member feedback re use of information provided in groups.*	*Nil required.*
	We explore new opportunities and develop new projects.	*Number of submissions.* *Number of successful submissions.*	*Ongoing reporting of submissions and outcomes in CEO Report.*	*Training of new team members in grant submissions.*
	We expand peer network (groups) locations via a process of new group establishment.	*Successful establishment of new group protocols.* *New group assessments undertaken upon member request/suggestion.*	*New groups.* *Development of new group establishment protocols.*	*Nil required.*

CAPSULE: THE LEARNING PERSPECTIVE ASKS US TO CONSIDER WHAT WE NEED TO LEARN IN ORDER TO BE SUCCESSFUL TODAY AND INTO THE UNKNOWN FUTURE. HERE WE CAN CONSIDER OUR EXTERNAL ENVIRONMENT AND REFLECT UPON OUR PREPAREDNESS FOR CHANGE.

SELF STUDY Q4.16:
For the two key objectives for the Learning domain you developed for your own peer organisation (in Self Study Questions 4.15) please now also list (for each): at least one possible measure, two ways in which we could measure this and, for each way of measuring, how often you think it should be measured.

WHO AND WHEN CONSIDERATIONS

Gathering evidence on peer support is important for designing peer support programs, understanding what the peer program looks like (e.g., delivery of peer support groups), and demonstrating program impact (e.g., quality of life, ILC outcomes). Knowing 'when, how, and what' to gather evidence about is very important. In many cases, answers to these questions can be critical to peer program sustainability.

OPTIONAL LINK: http://peersforprogress.org/take-action/evaluate-peer-support/#measure).

In general, gathering evidence about a peer program starts with planning to make sure we can answer not only the question of 'did our peer program work', but also 'how it worked'. Overall, it is crucial to identify reliable measures, indicators, tools, and instruments that are relevant to overall peer program objectives.

The BSC approach enables us to structure evidence gathering on our peer program around four perspectives. Each perspective considers our location relative to our selected destination – our vision. This approach enables our focus to go beyond budgets and member satisfaction to consider performance and how we can illustrate our success to our various stakeholders. The BSC developed is unique within each peer program, because each peer organisation will have an individual vision, mission and strategy for achieving success.

The BSC can serve as your compass on the journey though the complex and fast changing nature of the disability marketplace toward your vision. You have considered the various stakeholders and perspectives of performance. You have also thought about the various objectives that you may wish to focus on. Nonetheless, how do you collect the evidence required to assess your location? The perspectives have given us the tools to use. We now know what measures are likely to inform us about our location. We now need to put this into use on a regular basis. Ideally, we want to develop a plan for how we will be able to gather the evidence we consistently need. What things do we need to keep records of? Who do we need to find out answers from? Who will know most about specialized areas of evidence that may be important to us? Who can generate timely information on the specific measures, or indicators, we have formulated?

In addition to considering who will be involved in the gathering of our evidence, we must also consider when we will gather it. How commonly should we be seeing where we are on our journey? Is this an annual exercise, or something more frequent? How often is it that we will need to gauge our location and understand if we are still 'on track'? How regularly may we need to 'rechart' our course? Particularly if we are unsure of current conditions, or whether our boat is perfect in design, we may need to check frequently.

If there are various ways of checking our location, we may be able to perform quick examinations more often, and then do a more thorough assessment per annum? It may be that some of our evidence is gathered as part of our program design, so that it is always available as required? For example, it is likely that peer group facilitators regularly check attendance and may regularly ask members for feedback. Is there a mechanism in place to gather and track that evidence? Is attendance, budgetary information and team departures regularly reported already as part of the CEO's report to your Board? A very effective way of starting to gather evidence is to consider what is already being collected in an informal way or for other purposes.

Key considerations for peer programs in terms of who and when to gather evidence will include:

- Will our answers inform us about how our peer program worked?
- Does this measure relate to the BSC objectives, relative to our vision?
- Are we already gathering evidence we can use for this purpose?
- What things do we already keep records of that could perhaps be used differently?
- Who shall we gather answers from?
- When shall we gather evidence, and how frequently shall we do this?
- Do we need thorough assessment, or regular quick indicators?

If we require evidence that is not available from any existing source, we will need to design a way of gathering this. Many options/tools are accessible to assist us in our evidence harvesting process. We will be exploring this further in Module 5 where we consider 'tool and collection specifics'.

OPTIONAL LINK TO EXAMPLE: **http://peersforprogress.org/take-action/evaluate-peer-support/#find**.

CAPSULE: THE WHO AND WHEN CONSIDERATIONS ARE IMPORTANT AS THEY DETERMINE THE OVERALL 'EVIDENCE GATHERING PLAN'. USING EXISTING TOOLS AND INFORMATION IS MOST EFFICIENT, BUT REGULAR CHECKS OF OUR LOCATION USUALLY REQUIRED THE USE OF SOME TOOLS (WHICH WE WILL NEXT CONSIDER).

SELF STUDY Q4.17:
Identify at least two possible sources of information already being collected that may be relevant to at least one of the objectives you have identified under the BSC perspectives.

IN SUMMARY

Peer support organisations share a common strong rights-based foundation and a philosophy of delivering good practice peer support. In this module we continued our focus on the Balanced Scorecard (BSC) as a way of understanding where we are heading and then structuring our journey toward the destination. You have been asked to consider how you are currently performing (Funders, Members), how you may improve your processes, motivate and educate your team and enhance systems (Build) as well as your ability to learn and improve now and into the future (Learning). In this Module we considered where we want to be, what evidence we need to gather to understand where we are currently, and how far we have to our destination. This has involved a series of steps and decisions that will be unique to your own peer organisation. However, the process of asking questions and gathering evidence to be able to answer them; will be a journey that all programs can benefit from.

Peer support programs operate in a complex, changing environment. We have used the BSC and its four perspectives to structure program objectives. For each objective we then need to select an indicator, or something that will inform us about that objective. Each indicator needs to be able to be measured in some way, so that we can see how close or far away, we are from our vision. For each objective's indicator, we considered a target. What level are you hoping to achieve? How close are you? For example, do we need a marketing strategy to reach a particular number of new members?

Having established the 'what' we will be measuring, we then considered the 'who' and 'when' questions. While it is likely to be most efficient to use existing information sources, it is clear that in many cases new tools or instruments will be needed to enable us to assess our situation. To gather relevant evidence, we will require relevant and tailored tools. In our next Module we will continue our journey as we consider in more detail tools and the specifics of gathering evidence.

RESOURCES

- The BSC model is featured on several sites for those wanting further details – see for example: https://www.balancedscorecard.org/BSC-Basics/About-the-Balanced-Scorecard, https://balancedscorecards.com/balanced-scorecard/).
- The BSC is featured in a range of videos available for viewing including: https://www.youtube.com/watch?v=OZtNk__7Qyg and https://www.youtube.com/watch?v=M_IlOlywryw.
- The Better Evaluation website provides an excellent overview on identification of success: https://www.betterevaluation.org/en/rainbow_framework/frame/determine_what_success_looks_like.
- The Social Policy Research Centre's practice review, published by Davy, Fisher & Wehbe (2018) - LINK TO FULL SPRC REPORT HERE.
- The NDIA provide ILC information online: https://ilctoolkit.ndis.gov.au/about-ilc and addition information on ILC outcomes specifically at: https://ilctoolkit.ndis.gov.au/outcomes/ilc-outcomes. The 'ILC Outcomes Discussion Starter' (available via link on that same webpage) is also helpful.
- JFA Youth information is available at: https://www.purpleorange.org.au/what-we-do/library-our-work/jfy-peer-support-network including a video focussed on one member, 'Tim' and the role of peer support is his life.
- Peer groups supporting the LGBTI* and CALD communities are delivered by PDA (see https://www.peerconnect.org.au/files/9314/5741/3088/PWD_PSNs.pdf for further details).
- VALID illustrates that peer groups catering specifically at socially isolated and hard to reach people living with disability can he hugely beneficial and successful (see http://www.valid.org.au/ for further details).
- Article on lack of government policy success for indigenous Australians – see https://www.theguardian.com/australia-news/2017/apr/12/australian-governments-have-failed-indigenous-peoples-says-oxfam.
- The First People's Disability Network (https://fpdn.org.au/) has information on programs provided. They also have a range of excellent films available (see https://fpdn.org.au/our-films/) including an excellent film on art and peer support (https://www.youtube.com/watch?v=eEyZ4MZZ2lc).
- The Better Evaluation website has information related to unintended consequences of programs – see https://www.betterevaluation.org/en/rainbow_framework/define/identify_potential_unintended_results.
- The Peers for Progress website has information on finding measures and options available, see: http://peersforprogress.org/take-action/evaluate-peer-support/#measure and http://peersforprogress.org/take-action/evaluate-peer-support/#find.

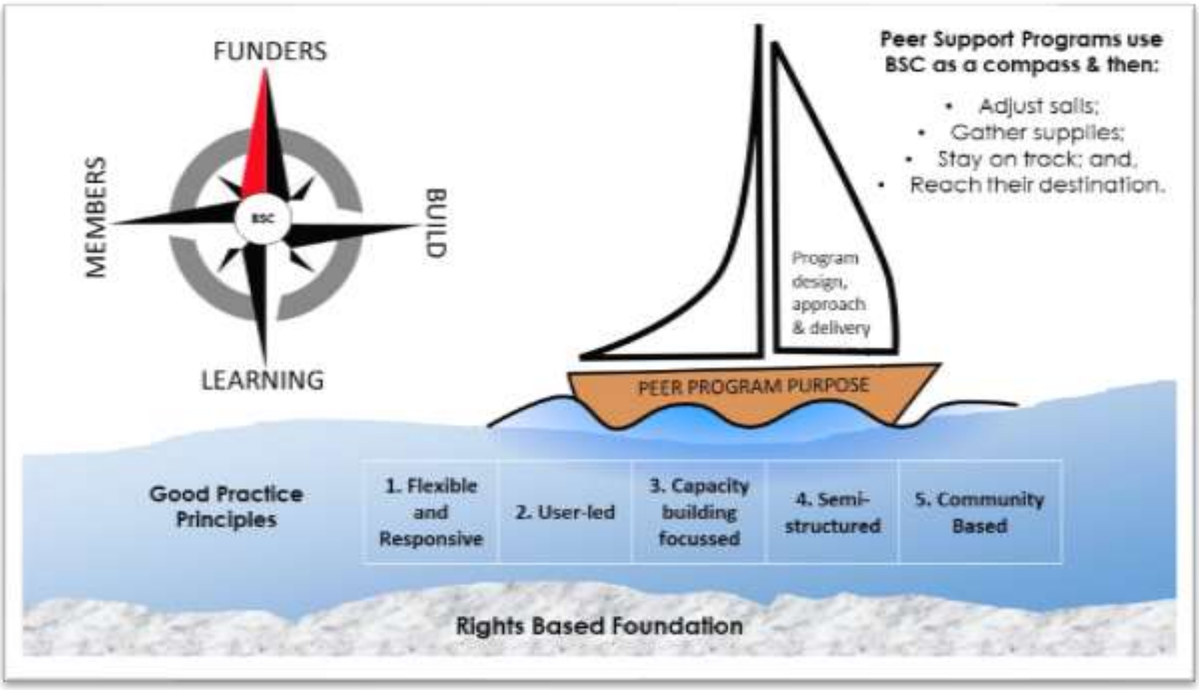
CAPACITY BUILDING FOR PEER SUPPORT

FIVE: TOOLS & COLLECTION SPECIFICS

SECTIONS:

THE TOOLS AND COLLECTION INTRODUCTION

As peer organisations, we need to know where it is we are heading (our vision) and determine the way we will get there. In our journey so far, the Balanced Scorecard (BSC) has been introduced as a way of understanding our destination and of thinking about how we structure our journey there. The BSC enables peer organisations to gather evidence about where they are relative to where they want to be. It acts as a kind of compass to assist each unique peer program to navigate their way based on their purpose, program design and concept of success.



In our last Training Package section '*Why, What, Who and When of Gathering Evidence*', we asked peer organisations to reflect upon what is most important for their success in how they are currently performing (Funders, Members), in which ways it may improve its processes, motivate and educate employees, and enhance systems (Build) as well as, its ability to learn and improve, now and into the future (Learning). Within the four BSC perspectives, you undertook a series of steps and decisions that will be unique to your own peer organisation. You contemplated a range of questions regarding your destination, your concept(s) of success and started to think about the ways in which you can gather the evidence you need to answer these questions.

Every peer organisation chooses its own objectives under each of these four BSC perspectives. Once selected, we then need to consider how we will make a judgement about whether we have met that objective. What will show us if we have reached each of our goals? Is it someone's opinion, a figure in a financial statement, or even receiving an ILC grant? The BSC enables us to see that it could be all three, along with many others as well. We can assess every objective within each perspective but to do this we need to be clear about what we think is the best way of measuring them all - individually and collectively.

In the self study questions, you considered the fundamentals needed to develop tables for each of the four perspectives that listed your objectives and their measures (or 'indicators'). Some of these indicators were an opinion of someone, others were a collected figure, for example, in the form of group attendance or number of new members. It may be there is a measure of a specific objective, which is already compiled as a component of your regular program management.

It is likely that, for at least some of your objectives, you will be asking for feedback from a stakeholder, such as a peer group participant, one of your team members, or potentially even a donor. In these cases, we need to determine how we will assess the indicator, using some form of tool. Gathering evidence on specific objectives will often require the use of tailored and relevant instruments. Within this section of the Training Package, continue our journey as we contemplate tools, as well as, the specifics of gathering evidence.

Initially we will explore the considerations based around our evaluation planning, including:

- The primary considerations, pertaining to, the ethics of collecting evidence from individuals; and,
- The issue of resources when it comes to gathering evidence.

Once we are comfortable with the fundamental principles, we then move on to thinking about the specific tools and techniques available to us for harvesting the evidence we need for our journey.

CONSIDERATIONS WHEN COLLECTING EVIDENCE FROM PEOPLE

Some of the evidence we gather may be from our systems or recorded information already collected. In many cases, however, we will have chosen indicators that can only assessed by asking people questions. Before we ponder different ways we can ask questions or gather feedback from people, we need to ensure we understand the rudimentary concepts of ethical collection. There are many online resources, dealing with these issues in more detail but without the peer program focus, you may wish to consult:

OPTIONAL LINKS: http://mypeer.org.au/monitoring-evaluation/ethical-considerations/ and https://www.betterevaluation.org/en/rainbow_framework/manage/define_ethical_and_quality_evaluation_standards for additional discussion regarding quality and ethics in evaluation more broadly.

Nonetheless, the key issues to think about before asking people to be involved are: informed consent, voluntary participation, do no harm, confidentiality, anonymity and assessing only relevant components.

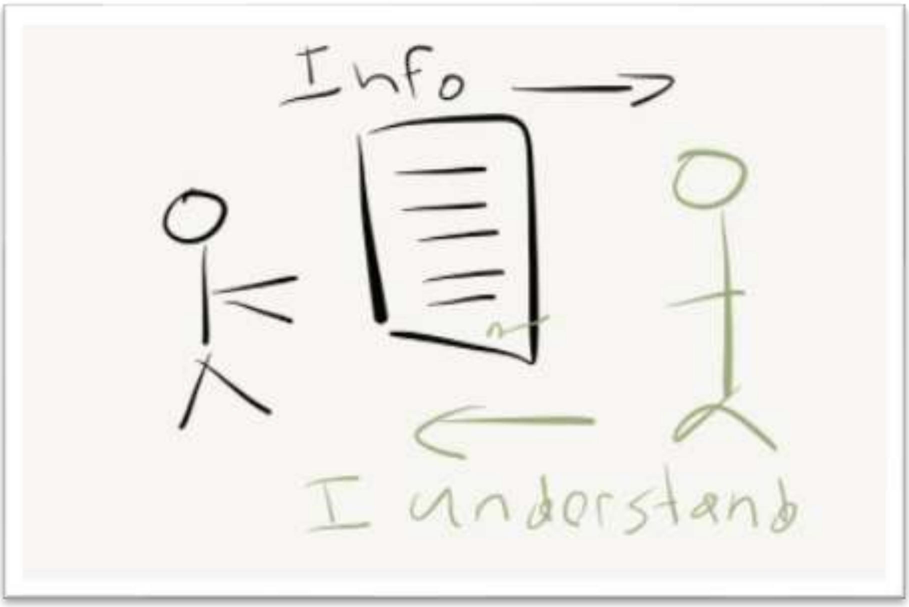
INFORMED CONSENT

Informed consent means the person being asked questions has been fully informed about your evidence gathering.

- Have you told the person all about the reason you want to ask them questions?
- Did you let them know who or what group is paying for the exercise?
- Are you aware of how exactly their answers will be utilised?
- Have you told them this?
- Is your concern that the people you ask questions of, may be negatively impacted by them, reasonable?

If you are worried about this at all, you must be open with the person involved about any potentially adverse reactions to them from being involved. For example, if you are planning to ask, 'Were you lonely before joining the peer group?' it would be reasonable to assume this may bring up feelings of sadness for the person being asked. You need to let them know, some questions may evoke emotional reactions. You should also consider if you are able to reframe the questions you are asking, to minimise such a risk. Do you know exactly who will have access to their answers? Will information be identifiable to the individual respondent? Before you ask the first person a question, you need to be precisely aware of how you will utilise the answers, what format they will take and who will see them.

You need to have high quality accessible information sheets, together with straightforward and user-friendly consent signing sheets. This will ensure you not only deliver the information needed to provide informed consent, but also that you have a record of having done so. Remember, the primary purpose of informed consent is that the responder is able to make an informed decision about whether they want to answer your questions. It is also a good strategy to have additional information and processes in place, in the event the person being asked questions becomes distressed, in any way, during the process. It is also a good idea to ensure that the person asking the questions has access to support mechanisms if they encounter such distress in a respondent. This is important because it would be difficult for both parties if questions cause any distress.



VOLUNTARY PARTICIPATION

Voluntary participation means the people answering questions have made a free choice to be involved in the gathering of information. They should not be coerced into being involved in any way. It is crucial they are able to stop the questions, or change their mind about being involved, at any time. The decision to stop or withdraw must never impact upon their ability to access your peer programs. There cannot be any suggestion that their decision to participate or not will affect their relationship with any of the people asking the questions, or any other group members. It can be challenging to encourage new members to become part of a group. It may be that their insights are highly valued by your team, but you should place no pressure upon those who choose not to participate. Explanations are not required either. The person must want to answer your questions; if they do not, you must respect their decision.

DO NO HARM

Naturally, when delivering peer programs, we never want to cause negative consequences for involved members. When asking people questions about programs, we also do not want to cause any nature of harm to the people answering the questions (unintended or otherwise). It is therefore important to reflect deeply, prior to commencing your evidence gathering process, about whether there is any potential of adverse effects for those being asked questions. Harm can be both physical and/or psychological. It could take various forms. These could range from, stress and anxiety, diminished self-esteem and self-worth, or a reduced sense of privacy. Each question should be thought about mindfully to avoid any such risks. For example, rather than asking ‘‘Were you lonely before you joined the peer group?’ it would be safer to ask, ‘What are the benefits of being a peer group member?’. Even if the information gathered is less ‘strong’ or less ‘compelling’, the safety of those being asked is paramount. Your information collection should never cause harm to the people you are asking questions of.

CONFIDENTIALITY & ANONYMITY

We use the word ‘confidential’ a great deal. However, within the disability peer support, information collection space, what does this really mean? We often think that keeping information confidential simply means we need to ensure we do not use a responder’s name in available information. When it fact, it implies so much more than that. Confidentiality means any identifying information is not made accessible to anyone but the person coordinating the collection (or potentially people in their team). Confidentiality also guarantees such identifying information is excluded from any reports or published documents.

In peer support, where some groups involve small numbers of members, just deleting a name may not secure confidentiality. It is very important to consider how collected information is worded to make sure there is no opportunity for people to be identified, even though names are not used. For example, if you have a single member who lives rurally, having 'rural member response' listed separately from metropolitan members will clearly make it easy to identify their comments/answers.

Anonymity is a stricter form of privacy than confidentiality. In this case, the identity of the person answering the questions remains unknown to everyone involved. This is possible to achieve if you use mailed surveys and reply paid addressed envelopes that provide no tracking information to the posting team. Anonymity is usually more difficult to achieve than confidentiality, and is usually not required within the peer program collections we undertake. It may also be difficult to manage in the disability space, given the number of members who may struggle with organisational tasks, such as posting a survey back, or where writing communication is limited. However, you can consider this if it is likely to improve feedback levels or level of security when people seek it.

ONLY ASSESS RELEVANT COMPONENTS

Asking people what they had for dinner is unlikely to be relevant to any peer program evaluation. However, so to, may be questions, relating to gender, marital status and age. It is important to think about what information is actually relevant and required when you are planning its collection. Only ask questions for components which are of relevance to the item you are assessing. In other words, to use our 'boat' example, asking about the colour of the hull is not going to tell us anything about our location (unless of course we want someone in another boat to find us 😉).

People who live with disability are asked, far too often, for their confidential information. This may be by service providers, medical practitioners, governmental bodies (including the NDIS) and other groups. There is usually no need to ask a peer group member for details of their disability or other demographics (e.g. age, gender, marital status, sexuality) not relevant to their peer program experiences and views. As such, before we ask questions, we need to contemplate whether every item is essential. This is particularly relevant because of the likely frustration asking for such details may cause the respondent.

> *'High risk populations are sometimes being used as guinea pigs or a captive audience to ask all sorts of questions in evaluations that are of interest to groups conducting the program/initiative but not relevant to the program nor will be to the group who are involved in the program.' (My Peer website, 'Ethical Considerations' section – see http://mypeer.org.au/monitoring-evaluation/ethical-considerations/)*

It is good practice to keep questions, as simple as possible and to limit their number. What information is gathered should be planned with cognisance of the skills and abilities of the people you are questioning. Ensure that the questions you ask remain focused on what purpose you will use the data gathered. If you are unsure of how you will use some of the information you are collecting; ask yourself, should I really be collecting it at all?

CAPSULE: IF WE WANT TO ASK PEOPLE QUESTIONS WE FIRST MUST CONSIDER CONSENT, VOLUNTARY PARTICIPATION GUIDELINES, CONFIDENTIALITY AS WELL AS WHETHER THE PEOPLE BEING ASKED QUESTIONS BE PLACED AT ANY RISK OF HARM OR COERCED INTO PARTICIPATION?

SELF STUDY Q5.1: Think about the evidence you want to gather directly from people.
What are the key ways you will be planning to ensure you meet basic ethical guidelines in your evidence collection journey?

RESOURCES AVAILABLE

Whilst I know some of us get more excited than others about gathering our evidence and working out where we are in the peer support journey, we also need to be realistic. What is the reality of our situation and what resources do we really have available to work out our location? It is easy to set up exciting plans for multiple surveys, individual interviews and feedback loops, but what time and other resources do we really have available? With peer organisations facing the ongoing challenges of rolling out new peer groups, delivering existing programs and meeting grant deadlines and demands, it is important to add a touch of realism to the planning process.

Gathering evidence about a peer program will require resources. Requirements will include: financial/material resources, expertise resources, and time resources. It is important for you to be honest about what is available for this process and think about each of these dimensions. You will then need to balance your available resources with the type of information collection process you undertake. This doesn't mean that you can't do this well. High quality evidence can be collected with very few resources:

> *'The key is to evaluate your situation realistically, and then choose a project that is practical with the resources that you can devote to it.' (World Health Organisation, Workbook 7, 2000, p.12) (Workbooks available from: http://whqlibdoc.who.int/hq/2000/WHO_MSD_MSB_00.2a.pdf?ua=1).*

We need to consider what funding is available for devoting to gathering evidence under financial or material resources. It may be that some of the grant funding for the program is allocated for that purpose, or that you may need to ponder alternative options. For example, do you believe you need a part-time additional team member to undertake the evaluation but are without the resources to fund this? Do you have available space for a person to undertake the role, along with the needed facilities, such as a photocopier and space for securely, and confidentially, storing files? Are you able to recruit a University student to do the assessment, as a placement project? Are you able to attract a local academic in the disability space, who may wish to be involved and cover some of the costs due to the research, as well as, resulting publication opportunities, this evidence may bring?

Within expertise resources we need to consider what knowledge we have available or within our team. This applies in areas such as collecting information, conducting interviews, developing surveys and in the analysis of information. We hope that this training resource may enable the team to upskill if required. However, does your team have the time to work through this self-help program? In addition, are you able to ask questions and gather feedback from external experts? Considering the skills needed throughout the various phases of your evidence collecting process, will inform your thinking and planning.

Finally, within peer program delivery, it is likely our time resources will be reasonably limited. If you are able to secure additional assistance for the evidence collection and analysis, this may be manageable. However, existing team members are still likely to need to be involved, in various aspects of the project. Are they able to devote hours per client for the collection of evidence? What tasks might they need to forego to take this on? How important is this evidence collection for the team? Potentially, this is in fact, more crucial for your long-term viability, than other tasks with a tendency to be treated more urgently.

SELF STUDY Q5.2: Think about your available resources along the various resource dimensions as you consider planning your peer program evaluation:

a) Is there internal funding that can be devoted to this project? If yes, what amount?
b) Are there external bodies that may be willing to provide funding for this project? If yes, what amount?
c) Can you afford to hire new team members, or are existing staff able to do the project?
d) Is there a computer (and software) available for data entry and data analysis?
e) Is there printing and scanning facilities available (if required)?
f) Has anyone involved on the project done this type of project before? If yes, in what capacity?
g) Has anyone involved on the project worked on a computer before doing similar work?
h) Do you have access to expert "consultants," who can provide advice on your project?
i) How much time will each person have available to devote to this project? How regularly?
j) If existing team members are doing the project, how much time will they have to devote to this each week?

Reflecting on your resources will assist you in planning your evidence collection. Once you decide your plan, you need to check, once again, to ensure this fits in well with your resources. For now, however, it is sufficient to explore answers to these questions and think about them as we look at the various methods of collecting evidence in the next section.

CAPSULE: GATHERING EVIDENCE ABOUT A PEER PROGRAM WILL REQUIRE RESOURCES AND IT IS IMPORTANT TO CONSIDER YOUR AVAILABLE RESOURCES PRIOR TO MAKING DECISIONS ABOUT WHAT EVIDENCE YOU WILL COLLECT AND HOW YOU WILL COLLECT IT.

METHODS OF COLLECTING EVIDENCE

In our last training area, we developed program objectives within each of the four BSC perspectives. We contemplated the way we could collect information on each objective so that it gave us knowledge about where we were located, relative to our own vision and measures of success.

Objectives within the Funder perspective were set to meet the requirements of the ILC team and other donors. Within the Member perspective, we considered what it is that our members most value and want to experience from our peer groups. We then delved internally in the Build perspective and thought about what our program would need to develop and invest in for meeting those needs. Finally, we considered what knowledge we would need to learn now and in the future for continued success in our peer program delivery through the forward thinking Learning perspective.

Every evaluation (or evidence gathering) program needs clearly defined components and implementation plans. For each objective, you should try to formulate a measure that tells you whether the objective has been met. We have also considered this previously and selected indicators for each objective within the tables under each BSC perspective. By keeping a systematic record of all the indicators associated with each objective, you are systematically measuring how well the programme is doing. This is how we know where it is that we are, on our journey toward our vision.

What exactly are indicators? These are variables, or measurable pieces of information, which signify whether your peer program is achieving an objective. In some cases, you will be collecting evidence on your processes (i.e. have you delivered expected activities?). Others will be about outcomes from your activities. Process evidence informs you of how a peer program is implemented. It takes into account the various program inputs in their entirety. This includes our rights-based foundations, elements of good practice, specific goals and objectives selected, as well as, resources available. Process evidence also relates to the specific activities, such as, the facilitator training you provide, the group topics you discuss, and all other elements, right down to the individual peer support interactions and participant reactions.

Some areas you may contemplate collecting evidence on could include:

- Program context, influential aspects of the disability community
- Summarize evidence on who is participating in your groups;
- Evidence relating to how peer supporters/facilitators, are trained;
- specifics about peer supporter and participant interactions;
- Evidence on whether the delivery occurred as designed/planned.

Some ways you might measure these kinds of process objectives consist of:

- Interviews /questionnaires with peer supporters/participants/stakeholders;
- Observation of training sessions and peer support interactions;
- Administrative bookkeeping (such as, how many training sessions were held).

Outcome evidence tells you something about the changes which resulted from those activities and services. We will want to collect information on the impact of the peer support program. This applies both in terms of individual members and, hopefully, in the longer term, overall society attitudes around core concepts such as inclusion and equity. For example, we may want to ask members whether they know more about accessing the NDIS than before joining the group. Do they feel they now have greater autonomy in their life? Do they feel they have more choice and control?

As you plan the evidence you will collect, you need to consider the best available indicator to assess the achievement of each specific objective. If you collect information on that indicator, are you sure that this will tell you if you have achieved that objective?

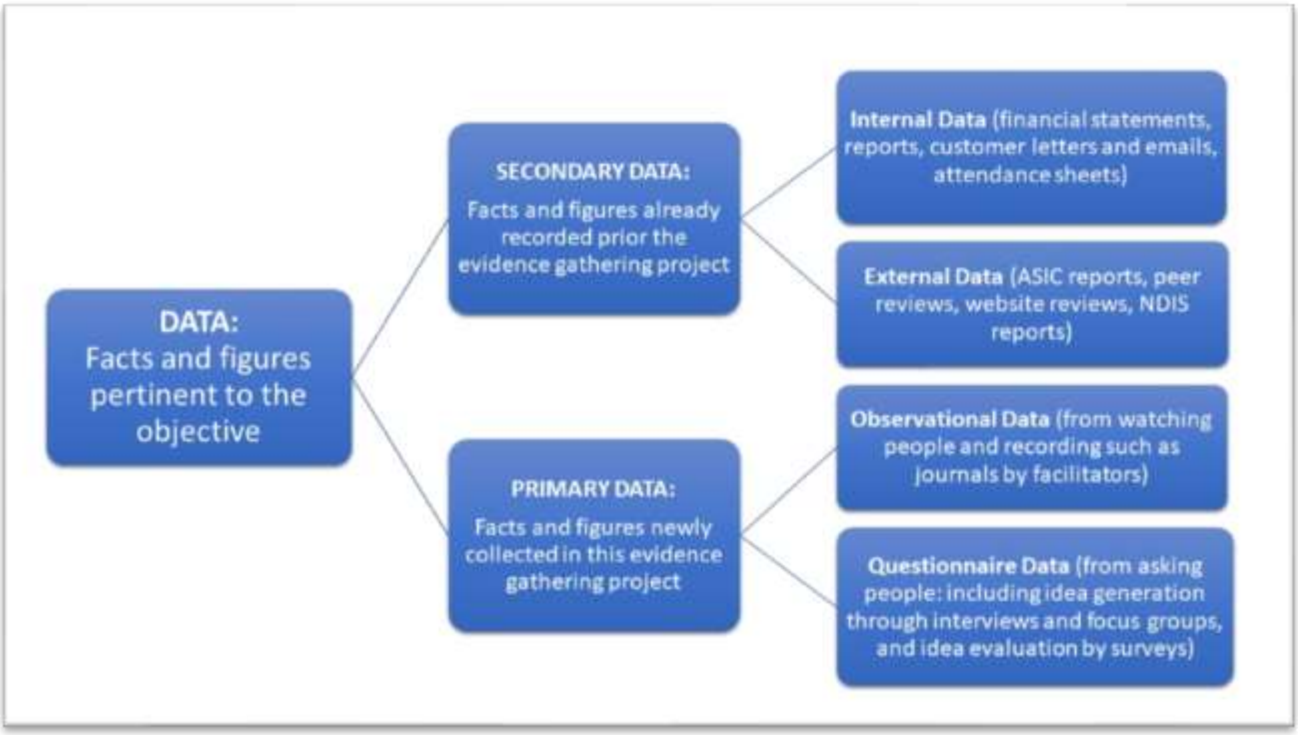
Broadly, it is possible to collect two main types of information on an indicator. These are information from secondary data, and information that is primary data. Secondary data involves gathering information from sources that have already been compiled in some way. For example, if a peer program objective is responsible budgetary management, a selected indicator may be a variance, (i.e. the difference between budgeted spending and actual spending). This information is likely already calculated for Board or Finance Committee meetings and reporting. If we use it to measure this objective, then we are using secondary data for this information collection. You should reference secondary information; that way, everyone knows where it has been drawn from (and who prepared it, along with its other uses, if appropriate). Documentation provides an ongoing record of activities. These records can take the form of informal feedback from peer group members, reflections through journals of group facilitators or progress reports. The challenge of documentation is that it requires an ongoing commitment to regularly document thoughts and activities throughout the evaluation process. Sometimes this can be overlooked, particularly given the strict time frames of delivering peer support.

Secondary data is the least expensive way of gathering evidence. This is because the only cost is in collating it for project purposes. The evidence was already being collected; meaning there is no additional outlay or investment required. The risk is that it is being developed for another purpose, so it may not be the most accurate or tailored measure possible for that peer program objective. As is often the case, there will naturally be a trade-off between the information's cost and benefits. This needs to be factored in when planning your overall evaluation, or 'information gathering' project.

Primary data is relevant information that comes from the project using purposeful observations and measurements collected. This evidence will form the basis of each thorough investigation of where your peer program is currently located. Evidence collection projects may involve the collection of qualitative and/or quantitative primary information. Quantitative information is collected through measurement and is able to be processed using computational, statistical or other techniques. This contrasts qualitative information, which is gathered using observation or subjective judgment and does not involve measurement (at least immediately). Qualitative information may be processed or quantified where appropriate, or it may be through images or as text (such as quotes by Members, or feedback from Funders). The nature of qualitative data should provide sufficient information for analysis and conclusion. Naturally, the type of information collected should be determined by the objective itself and the indicator selected.

SELF STUDY Q5.3:
Name two sources of secondary data that may be relevant in your evidence gathering process?
Name two sources of primary data that may be relevant in your evidence gathering process?

OPTIONAL LINK: See https://prezi.com/nim-6877c1r6/describe-and-evaluate-the-use-of-primary-and-secondary-data-in-research/ for a different way of gaining insight into the different data types.



When contemplating collection of information from primary sources, various methods are possible. While we may be able to collect evidence on our peer support via observations, this is generally not used in the peer space. Given our focus here on peer programs, we are going to consider questionnaire data, which is evidence we obtain by asking people. The two key collection methods here are either, from interviews or surveys.

INTERVIEWS

An interview is a formal meeting, where one or more persons question/consult/assess another person, such as in a job interview. When gathering evidence on a peer program, we can use interviews to collect information about how we are performing against a specific objective. Such interviews can be conducted face-to-face or by telephone with key stakeholders such as peer group members, funders and team members. They can range from in-depth, semi-structured to unstructured depending on the information we are wanting to collect.

Each interview method has its advantages. With face-to-face interviews, you can ask questions that are more detailed and probe answers for rich data. In face-to-face situations, non-verbal data can be collected through observation by the interviewer, and issues that are more complex are able to be explored. However, face-to-face interviews are expensive and time consuming. They use more resources, which are already likely to be very limited. The person doing the interviewing also needs training to reduce potential bias and undertake all interviews, in a standardised way. Evidence suggests that telephone interviews can provide just as accurate data as face-to-face ones. They are also cheaper and faster to conduct, use fewer resources, still allow the interviewer to clarify questions from the responder. They also do not require the responder to have literacy skills. Nonetheless, telephone interviews are not without their challenges. These include, having to make repeated calls because they may not be answered the first time, potential bias towards those who are at home, if other interviewees neglect to call back. It is only accessible to those with a telephone and finally, these calls are usually only suitable for short surveys.

SELF STUDY Q5.4:
In what situations/scenarios would you use an interview to collect evidence rather than a survey?

Interviews can generate ideas from one on one discussions. However, they also encompass focus groups, which are another method, sometimes used, in the peer support space. These group discussions are useful for further exploring a topic, providing in turn, a broader understanding of why the target group may think/behave in a particular way. They are usually undertaken with a small number of people from your group and are used to gain greater insights on more complex issues. For example, they may be appropriate if you are trying to gain an understanding of the reasons behind a particular attitude/belief held by people who are not choosing to attend your peer groups. While focus groups do not require participants to be literate, it obviously does not enable anonymity and being in a group means there is a lack of privacy. When planning focus groups it is important to carefully balance participants and ensure each group has a good mix across factors that may affect the feedback gathered. There is a risk of the group result being a ‘group think’, which does not accurately reflect individual attitudes/beliefs. There is also the potential for the group to be dominated by one or two people. Therefore, the focus group leader needs to be skilled/experienced in dealing with conflict, drawing out passive participants and creating a relaxed, welcoming environment. Focus groups may be lengthy to plan and conduct. Analysing outcomes from them can also be difficult and time consuming.

Surveys

A survey is a research method used for collecting data from a pre-defined group of respondents, to gain information and insights, on a topic of interest. Depending upon the methodology chosen and their purpose; surveys have a variety of functions and can be executed in many ways. A survey involves asking people for information through a questionnaire. You can distribute this on paper, although with the arrival of new technologies, it is more common to distribute them digitally via email or social networks. They can also be administered by telephone or face-to-face. Mail and electronically administered surveys have a wide reach. They are relatively cheap to administer, information is standardised and privacy can be maintained. These approaches do, however, have a low response rate and cannot be used to investigate issues to any great depth. They also require that the target group is literate and do not allow for any observation.

Surveys are just one way of gathering information but in the peer support space, their use has been successful and wide-ranging. They are usually asking people to answer the questions on 'a level playing field' to avoid biased opinions that could influence the evidence we are collecting. As surveys are self-reported by participants, it is vital they are designed and tested for validity/reliability with the target groups who will be completing them. If your resources do not allow for this, then careful attention must be given to the design of the survey. If possible, the use of an already designed and validated survey instrument will ensure that the data being collected is accurate. If you design your own survey, it is necessary to pilot test the material on a sample of your target group to ensure it is appropriate for the target group. Make sure that wherever possible, you use easy English and pictures, particularly, if your respondents are likely to struggle with more complex or wordy communications.

You are able to ask survey questions in several ways. These include: closed questions, open-ended and scaled questions, and multiple-choice questions. Closed questions are usually in the format of yes/no or true/false options. Closed questions give a limited choice of responses, but they are quick and easy to process and collate. Open-ended questions leave the answer entirely up to the respondent and therefore provide a greater range of responses. While open questions enable the respondent to answer freely and gives greater choice of responses, the data is then difficult to collate or group. Surveys can also utilise scales to assess attitudes. Semantic scales (where responders are asked to rate subjectively something from 1 to 5) are also widely used. For example, 'How connected do you feel with your peer group' on a scale of 1 to 5 (when 1 is not at all connected, and 5 is extremely connected)? You can also utilise multiple-choice questions. For example, asking respondents to indicate their favourite topic covered in the peer group, or their preferred location.

When constructing a survey, there are a large range of considerations. These consist of: question sequence, layout and appearance, length, language, together with, an introduction and cover letter. The length of the questionnaire will depend on your aims: 7-10 questions (no more than 1-3 pages) is usually an appropriate number. The layout of the questionnaire is equally important. Start by asking relevant background information and then lead into more specific and/or complex questions. It is a good idea to place any sensitive questions near the end of a survey, rather than at the beginning. You should only ask questions, where responses are relevant/required, as well as always being polite, neutral and sensitive to people who might not feel comfortable sharing some information such as age, gender or cultural background. It is important that you "road-test" your survey with similar responders, to those, you plan to survey. Their feedback will help you modify questions, which might be difficult, poorly worded or confusing.

Here is a quick checklist to refer to when writing the questions for a survey (based on listing in WHO, 2000, p.41)):

1. *Are the words simple, direct and familiar to your target audience?*
2. *Is the question as clear and specific as possible?*
3. *Is it a double question (i.e. are you asking them to answer two things in the same question)?*
4. *Does the question have a double negative?*
5. *Is the question too demanding?*
6. *Are the questions leading or biased?*
7. *Is the question relevant to all potential respondents?*
8. *Is the question objectionable (we obviously don't want to offend anyone we are asking questions)?*
9. *Have you made sure you do not use any abbreviations or acronyms?*
10. *Have you made sure you offer all possible responses in your closed questions?*

SELF STUDY Q5.5:
Surveys are popular for evaluations in the peer support space. Identify three key considerations if you were to develop a survey for your peer group members to explore the reasons they attend the group?

CREATIVE STRATEGIES

There are alternatives to the unadventurous options of questionnaires and observational journal notes for gathering evidence. There are other ways to tell our stories, further understanding of peer program impact and generate disability awareness. Within the peer space, there have been a large number of creative options used to tell peer stories and document the positive outcomes from peer programs. Drama, exhibition, and video are imaginative and attractive alternatives to written surveys. Particularly, if you want to share some of the excitement surrounding peer personal growth, telling stories is a great way to achieve this. For example, on the peerconnect site (https://www.peerconnect.org.au/) there are links through to a range of videos on peer support.

OPTIONAL FILMS: Great examples of peer program stories are available at:
https://vimeo.com/175482986) (benefits from peer support);
https://vimeo.com/211823631 (a story on how peer support helped a member build a better life);
https://vimeo.com/244582509 (on staying connected with peer members);
https://vimeo.com/210181126 (on establishing new peer support group);
https://vimeo.com/193004242 (on a youth peer support group);
https://www.youtube.com/watch?v=z43OWZYKv1k (on a deafblind peer support group);
http://www.cdah.org.au/this-is-my-world/ (a hip hop peer support film recently launched; and,
https://vimeo.com/214936558 (a personal story on peer support and volunteering).

While documenting stories in films appears unrelated to our information gathering, they can in fact make a valuable contribution to the evidence we collate. For example, a video case study may form part of the evidence, we can present to the ILC team when documenting the sense of connectedness peer group members feel.

Many other imaginative new approaches can be used to gather information on an indicator. Embracing creative arts in this process offers opportunities for different ways of understanding programs and building knowledge. The creative arts may be used in designing, interpreting, and communicating our assessment process. Creative strategies are advantageous, as they provide an opportunity for participants to portray experience through different art forms, which often reveals insights that they may not have been able to articulate in words, particularly if they have communication challenges. They are also flexible accommodating for people who learn in different ways, who have different cultural backgrounds and/or who are less articulate. You can employ creative strategies, in conjunction with more traditional methods.

A selection of challenges may arise from creative strategies. Some participants may be fearful of engaging with art, due to a lack of confidence, or past negative experiences. There are multiple forms of creative strategies, as outlined online (http://mypeer.org.au/monitoring-evaluation/data-collection-methods/). Examples of specific creative strategies for gathering evidence on peer programs include:

- Photographic based strategies:
    - Photo mapping – the mapping of some sort of infrastructure on a photo map by participants, such as asking peer group participants to outline the different disability supports available in an NDIS Plan or map their future based on what they know about the life choices and options.

    - Photo Essays – A technique used by participants to describe themselves or their own view on something. They take photos; create captions and a description. Peer programs could ask participants to capture a photo essay on what their peer group means to them.
    - Photo interviewing – this is the use of photographs as talking points during interviews or to structure discussions, such as in a focus group.

Photo mapping, Photo Essays and Photo Interviewing and discussed at: http://mypeer.org.au/monitoring-evaluation/data-collection-methods/creative-strategies/ and photo mapping at: https://adf.org.au/insights/creative-evaluation/.

- Social network mapping
    - Mapping involves the formation of a diagram that shows an individual's social network. This can go towards gaining evidence on the social links peer group members have now that they are in a group. Thereby, highlighting the support network available to the participant, giving them information about their friendships, families, trust and communication. For example, participants can think of up to five people who they could talk to about their NDIS self-management issues, or up to three people, they talk to about other life decisions.

- Through this, you can also describe a participants' 'Circle of Support. The networks can be hand drawn by participants. Using three concentric circles, the participant places the "you" in the middle circle and the first names of close friends and family in the innermost circle, and those who are less close in the outer circle.

OPTIONAL LINKS: http://communitylivingproject.org.au/circles-initiative/ and https://www.asid.asn.au/Portals/0/Conferences/NZ2010/Circles%20of%20Support%20for%20People%20with%20Disability%20-%20Ainslie%20Gee.pdf for Circle of Support content.

- Scenarios:
  - Using this method, a brief description of a specific situation is read. This is followed by multiple-choice questions or a structured interview, where the participant is asked about the situation and their interpretation of it, alongside potential responses, solutions, and even outcomes. For example, a peer group facilitator could be read a scenario about something that may occur in a peer group. From their responses, we then gain an understanding of their possible reactions. This could be used to assess the training and skills of peer facilitators without any need to either, observe the situation within a real group, or rely on self-rated knowledge scores.

- Collage:
  - Collage is an example of an arts-based technique that can be used in the peer space to gain feedback and insight about an issue or viewpoint. Collage making involves 'the cutting out, arranging and sticking down of images/text/drawings/colour that can be taken from a variety of sources. Collage can be as technological sophisticated as you want it to be, with the use of Photoshop and the internet, or as simple as resources dictate, for example, using scissors, paper and glue. The collage making process can generate observable information for analysis, as can the collages constructed also.

OPTIONAL LINK: See an example of its use at https://adf.org.au/insights/creative-evaluation/.

- Digital storytelling and vox pop:
  - Digital storytelling involves making a film that tells ordinary people's real life stories. This involves meaningful workshop processes and participatory production methods. The final product tends to be in the first-person narrative. This technique has been discussed above, and is used widely in the peer space, due to the impact such stories of change can have on various stakeholders and within the wider community.
  - The term 'vox pop' comes from the Latin phrase vox populi, meaning 'voice of the people'. Traditionally, the vox pop is a tool used in media research, to provide a snapshot of public opinion. Random participants are asked to give their views on a particular topic: these are then viewed as reflection of popular opinion. This has yet to be used widely within the peer space but could certainly be of interest, if a user-led organisation is trying to gain media content for sharing.
- Other Art forms:
  - Dance and drama has been used as a communication form since its inception. The art of dance and everyday movement provide a pattern of meaningful motions of the body that can convey an interpretation of the world we live in. It is feasible for a theatrical performance to be utilised as a representation of data on a group's expression of their experience, though this has yet to be used in the peer space. Telling a story through writing and performance can be an effective way to explore personal or group experiences and has been used widely in the disability sector.

OPTIONAL LINK – See stories here: http://tutti.org.au/.

  - Sculpture techniques have been used as a way to express feelings, and it is possible that peer groups could engage this type of artwork to express information about their peer groups. Sharing the results could form the basis for learning, understanding and action. Clay is a particularly suitable material for this process given its suitability for cutting, pounding, prodding, stabbing, squeezing, shaping, breaking and sticking, making it ideal for the expression of feelings. This may be a helpful strategy, if we are trying to gain insight with individuals, who are unable to communication in other ways.

OPTIONAL ADDITIONAL LINKS ON CREATIVE STRATEGIES available under 'Resources' section.

SELF STUDY Q5.6:
Describe one example of a creative strategy for evidence collection that could be used to explore the reasons your peer group members attend their peer group.

CAPSULE: TO USE OUR COMPASS WE NEED TO SELECT AN INDICATOR FOR EVERY OBJECTIVE. THE INFORMATION WE COLLECT ON THAT INDICATOR WILL TELL US IF WE ARE ON TRACK ON THE JOURNEY TOWARD OUR VISION. WE CAN USE SECONDARY OR PRIMARY DATA TO COLLECT, AND THE MOST COMMON METHOD TO GATHER ATTITUDINAL INFORMATION IS SURVEYS.

When we are gathering evidence, using a single collection method always carries the risk that our data may not be valid. We may be gathering evidence on something we are not expecting. For example, we might think we have evidence of personal growth from peer group attendances but we are actually capturing evidence about the impact of new service provider rollouts. One way of overcoming lack of data validity is triangulation. This is when we use multiple forms of data collection, such as focus groups and surveys as well as, observation, to investigate an objective. Utilising multiple data collection methods leads to more confidence about our findings when evidence from various sources, are comparable and consistent. Using more than one person to collect the data can also increase its reliability. This, however, usually increases the cost of the evaluation.

COLLECTING 'GOOD' INFORMATION

We have now explored many alternative ways of collecting evidence. These will allow us to gain insight into where your program is on your peer support venture. Remember, we are using the Balanced Scorecard (BSC) as a way of structuring our compass for this journey. The four perspectives enable us to think about various dimensions of success, all focussed on our vision, which is our destination ahead. As we previously identified key objectives within each perspective, we were selecting the most important dimensions of our peer program performance. Nevertheless, for our compass to be effective, we need to gather information on every objective, so that we know where exactly we are.

We have now gained an assortment of 'tools', which we can use for gathering this information. Our toolbox now includes: existing documentation, observations, interviews, surveys and a vast array of creative methods for possible use. The question now becomes, how do we choose the most appropriate method(s) to collect our evidence? Naturally, ethical considerations will influence our selections. However, our focus remains on ensuring we capture the best information we can, within our limited resources. What do we mean by 'best information' and what should be considered 'good' information?

> *'Good information is that which is used and which creates value. Experience and research shows that good information has numerous qualities. Good information is relevant for its purpose, sufficiently accurate for its purpose, complete enough for the problem, reliable and targeted to the right person.' (www.jhigh.co.uk/Intermediate2/Using%20Information/12_charact_of_info.html)*

When deciding upon our information-gathering plan, we therefore want our information to be:

- Relevant;
- Clear;
- Sufficiently accurate;
- As complete as possible;
- Trustworthy;
- Concise;
- Provided (or collected) in a timely manner; and,
- Available to the right person.

Being concise is an important consideration in the peer space, as we could easily find ourselves with too much information and lacking the resources to collate/manage it. We need to continually ask ourselves whether the information we are planning to collect will adequately answer our questions. You need to ask different questions, at each stage of your information gathering process.

1. Defining Your Information Need

Before you start collecting, it is best if you can clearly define what information you need. Defining your information need helps you know where to start looking. How clear is your objective? Do you need to be more specific? If you know exactly what information you are looking for, you will be better able to recognise the best collection plan when you formulate it. To do so, contemplate:

- What information do you need? Define your objective clearly.
- What information do you already have on the subject? What facts/background information do you already know?
- Do you want general or specific information about the subject?
- How much information do you want? A single viewpoint? A single figure?
- What types of information do you want? For example, are you looking for:
  - opinions
  - statistics or data
  - case studies or specific examples
  - historical information
- What sources could help you select the information needed (e.g. your organisation's accountant, a peer facilitator)?

2. Evaluate the Source of Information

It may be possible to gain insight into some objectives, or the information we need to assess our performance of them, from existing sources. We call this, secondary data. If we are contemplating using this information, we need to be sure that it is trustworthy, accurate and relevant to the specific objective we want to assess. We may need to think about:

- Who compiled the information, and do they have the appropriate education and experience to do this accurately?
- Who is the intended audience for this information? Is it acceptable to use it for your purposes?
- What type of source is it? Is it Board level financial information, or hearsay from the coffee room? Is the information suitable for your needs (e.g. not too simple or too difficult)?
- When was the information produced? Is it still timely enough, or will it be produced again?
- Why was the information produced? Could the purpose result in any bias (e.g. political or cultural)?
- How is the information organised? Does this suit our needs, or will we need the raw evidence to collate it in a useful format ourselves?

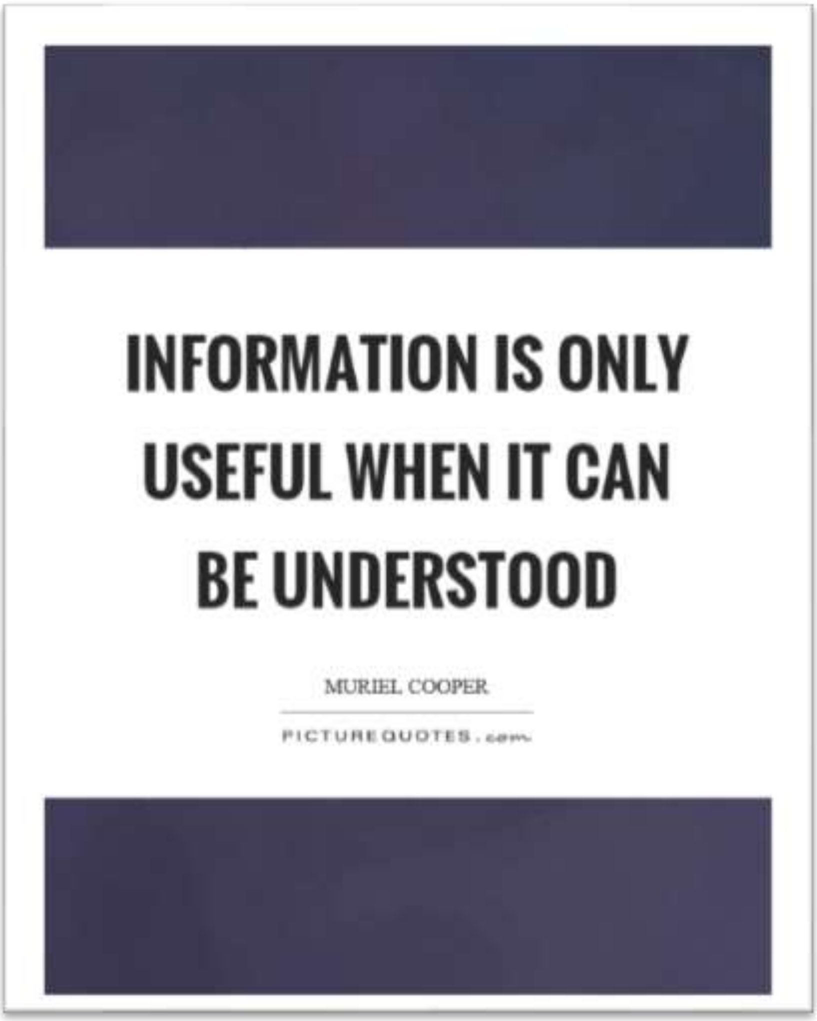
If we are planning to collect our own information, then we need to select the most appropriate collection method. This will be primary information. Resources, including expertise, will influence this but it is likely that there will be low cost options that can be adapted for your use (which we will examine below).

3. Evaluate the Information Content Itself

Finally, after you have accessed and collected your required information, you should be able to answer questions about the type and quality of information that it gives.

- Does the information collected meet your wants/needs? Does it provide you with evidence about whether you have achieved your target indicator for the specific objective?
- Does it contain primary data (e.g. from a survey) or is it a compilation or evidence prepared for a different purpose?
- What main concepts do you present in the information? How is it you collate/interpret the evidence?
- What facts or opinions do you present? Do these represent more than one point of view? What are the major findings? Are the facts supportive of these?
- Do any other available sources substantiate the conclusions drawn from this source?

OPTIONAL LINK – You can read further on what makes 'good evidence' on the Better Evaluation website, for example: https://www.betterevaluation.org/en/resources/research-paper/what_counts_as_good_evidence.



Capsule: Using our toolbox of alternative information collection approaches, we need to ensure we collect information that is relevant, accurate, complete, reliable and targeted. We must question our information collection throughout the process to be sure that collected evidence is adequate for our various needs.

SELF STUDY Q5.7:
Identify five important considerations when deciding how we can ensure we collect only 'good' information throughout our evaluation journey?

Example: Objectives and Options

It is clear that there is a raft of alternative options surrounding evidence collection. We want to show our funders, we are meeting the needs of our members by focussing on systems and processes that support them, as well as, pondering the future, together with, the growth and development of our peer programs. It may be helpful to seek guidance via a table of options (shown below). This table builds on the content developed during our last section of the training package, with new content shown in the green shaded column. The table can act as a type of smorgasbord, which may entice you to indulge. The buffet option is popular; this is due to its endless possibilities and great value. However, reduced quality is likely, given it is made as a generic offering.

You may like to select the most appropriate items, specific to your program from an A 'la Carte Menu of possibilities. You can then appraise the vast range of basic options, to decipher a combination, which perfectly suits your preferred style. Naturally, your own peer program will dictate the objectives decide upon. Nonetheless, the table below is provided to illustrate the information collection routes available to assess the objectives, rather than, to assist you with objective choices. Tailoring your evidence gathering is likely to give excellent information. However, designing new tools may utilise a high level of resources. Therefore, the focus on options suggested is on tools likely to be already available (or adaptable) for your needs, as well as, those that can serve multiple purposes.

SELF STUDY: Ensure you have next to you the answers you gave to the following Questions: 4.6, 4.7, 4.9, 4.10, 4.11, 4.12, 4.14, 4.15 and 4.16.
These answers will form the basis for the next collection of self study questions.

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
FUNDERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?		
OBJECTIVE 1: We are a highly efficient charity; we ensure we have low overheads.	Accounting records are used as we use administration cost %age of program delivery costs as measurement.	*Use Accounting system figures to calculate this figure: 'Program Delivery' costs calculated as a percentage 'Administration' costs (target = < 20%). Ask the Finance team to provide figures when Annual Report is finalised.*
	We use feedback from donors to gauge funder view of efficiency.	*Survey sent out with receipt for each tax-deductible donation asking why they chose our program to donate to. New survey to be developed (simple multi choice, Y/N and rating questions).*
OBJECTIVE 2: We have multiple sources of revenue including from investment returns.	Accounting records are used to measure earnings from term deposits – as measured by investment returns in accounts.	*CEO to report to Board at monthly meetings on investment returns being >2.8% on prepaid revenue (which is a large source of peer program earnings).*
	Investment is only possible if we accurate manage the budget; variances are assessed regularly.	*CEO to report to Board at monthly meetings on budgetary variances and large +ve or -ve variances are reported to the evidence gathering team.*
	Finance team provides feedback on revenue sources of program.	*Use Accounting system evidence. Ask the Finance team to provide number of sources when Annual Report is finalised.*
	New funding sources are reported to assessor when they occur by Finance team.	*Use Finance team by asking them to report any new revenue sources when they land (and are coded), at least monthly.*
OBJECTIVE 3: We offer a welcoming, safe and supportive environment to our peer members (one of the ILC Outcomes).	Gather opinion information from peer group members on how welcomed, safe and supported they feel in the group.	*Surveys of peer group members asking 'do you feel welcome in your peer group?' and 'do you feel supported within your peer group?'. Target = 85% of members agree they are welcomed and feel supported in their group. Could be part of an annual member survey.*
	Gather opinion information from peer group facilitators on techniques used to build group cohesiveness.	*Surveys of peer group facilitators where we ask what they do to build a group where members feel welcomed and supported. Could form part of an annual peer facilitator survey, which can then be used for training planning also.*
	Gather opinion information from peer group members who have stopped attending a group.	*Surveys of peer group members no longer attending asking 'did you feel welcome in the group?', and 'If not, why?' and 'what could have helped you feel more welcomed?' and alike.*
OBJECTIVE 4: We focus on building Individual Capacity in	Gather opinion information from peer group members on information they receive.	*Surveys of peer group members asking 'are you provided with relevant information in your peer group?' and 'do you want to receive different information in your peer group?' and perhaps ask them to rate information provided in terms of quality or*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
our members (ILC goal) by (for e.g.): • Providing high quality, relevant information at our peer group sessions.		*relevant using rating scale question(s). Target = 85% of members agree they receive high quality relevant information. Could be part of an annual member survey.*
	Gather opinion information from peer group facilitators on the information they provide.	*Surveys of peer group facilitators where we ask about the information they deliver (perhaps its source, how they select it, the role of member feedback in selecting content, etc). Could form part of an annual peer facilitator survey, which can then be used for training planning also.*
	Have evidence collectors review content delivered and its rate quality/relevance.	*Use information delivery documentation to assess relevance and quality using clear guidelines that are consistently applied. Explore strategies of improving information or sharing the best.*
OBJECTIVE 5: We regularly invest in peer program development, learning and group leading training.	Accounting records are used to measure investment in training.	*Use Accounting system evidence. Ask the Finance team to provide total training expenditure across peer team when Annual Report is finalised.*
	Accounting records are used to measure investment in relevant peer group facilitator training.	*Use Accounting system evidence. Ask the Finance team to provide total training expenditure for peer group facilitators (only) when the Annual Report is finalised.*
	Gather opinion information from peer group facilitators on the training they receive (and want).	*Surveys of peer group facilitators where we ask about training they have been able to access as well as areas of need for future training. Could form part of an annual peer facilitator survey, which can then be used for training planning also.*
OBJECTIVE 6: We meet grant requirements (including the collection of accurate Evaluation Evidence) as per ILC Grant Submission.	Utilise opinion data and feedback from the ILC team on program evaluations undertaken.	*Request feedback from ILC team provided to CEO/peer team leaders on adherence to plan according to evaluation evidence collection.*
	Peer team compares planned evaluation with evidence collected and rates accuracy of plan and quality of process.	*Use overall evidence collection plan and process to assess if the ILC Grant submission planned evaluation was accurate and followed. Explore strategies of improving evaluation planning.*
	Peer team compares dates of submission with scheduled dates for evidence submission.	*Use existing documentation of submission dates as compared to deadlines to assess timeliness of evaluation evidence submitted.*
OBJECTIVE 7: We submit acceptable Grant Reports & Workplans on time.	Utilise opinion data and feedback from the ILC team on reports and work plans submitted.	*Request feedback from ILC team provided to CEO/peer team leaders on reports and work plans submitted (if this is provided).*
	Peer team compares submission with scheduled dates for reports and work plans and searches for evidence of extensions.	*Use existing documentation of submission dates as compared to deadlines to assess timeliness of all reports and work plans required within program grant terms.*

SELF STUDY Q5.8:

Using your answers to Questions 4.6 and 4.7, complete the first two columns of this table. Next use the examples in the table above and your learnings from this package to complete the table columns:

- Indicators: Define each measure (or indicator) you could use to assess this objective as clearly as possible.
- Evidence Collection Strategy: Here you should list the process you will follow to gather evidence on this measure. Will you use a survey, interview of other method? Is there an existing source of evidence you can access and use?

- Tools & Frequency: Tools to be developed should be listed and described. How frequently you will plan to use the tools or other evidence collection methods should be listed here also for consideration.

QUESTION 4.6: Two FUNDER **Objectives**	**QUESTION 4.7:** Measure for each & measurement notes	**Indicators:** Define Measure to be used	**Evidence Collection Strategy**	**Tools** to be developed; **Frequency** & other notes to be considered
FUNDERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?				
OBJECTIVE 1:				
OBJECTIVE 2:				
OBJECTIVE ___				

Objectives	**Possible Indicators**	**Possible Collection Strategy &/or Tools** NEW
MEMBERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR MEMBERS (& POTENTIAL MEMBERS)?		
OBJECTIVE 1: We build the capacity of individual peer group members by providing high quality, relevant information at our peer group sessions (*shared with Funders Objective 4*).	Gather opinion information from peer group members on information they receive.	*Surveys of peer group members asking 'are you provided with relevant information in your peer group?' and 'do you want to receive different information in your peer group?' and perhaps ask them to rate information provided in terms of quality or relevant using rating scale question(s). Target = 85% of members agree they receive high quality relevant information. Could be part of an annual member survey.*
	Gather opinion information from peer group facilitators on the information they provide.	*Surveys of peer group facilitators where we ask about the information they deliver (perhaps its source, how they select it, the role of member feedback in selecting content, etc). Could form part of an annual peer facilitator survey, which can then be used for training planning also.*
	Have the evidence collectors review content delivered and its rate quality/relevance.	*Use information delivery documentation to assess relevance and quality using clear guidelines that are consistently applied. Explore strategies of improving information or sharing the best.*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
OBJECTIVE 2: We provide high quality, relevant programs that are easily accessible.	Have the team ensure accurate recording of attendances for all sessions/events within a centrally located (protected) file/portal.	*Use the attendance file to analyse attendance across groups and topics to ensure each group (ie location) and topic (for relevance) brings in appropriate/expected attendance levels.*
	Evidence collection team checks when all session/event information flyers, group summaries and Calendars are provided to members.	*Use the computer and newsletter files to record and analyse when event information was delivered and rate its timeliness. Also, ask team members if there were complaints regarding lack of information or cancellations not provided to members.*
	Number of new members across the various peer groups offered.	*Ensure attendance file includes recording of new members. Analyse across groups and topics to ensure each group brings in new members regularly. Check they also continue to attend.*
OBJECTIVE 3: We educate, inform and upskill via our programs: local support group sessions, special sessions, newsletters, online presence and other.	Have the evidence collectors review newsletter, website and other content delivered, record evidence on delivery and give each item an overall rating.	*Use program documentation to record frequency and timeliness of newsletters, feedback received for each item, attendance figures where appropriate, and number of topics covered. Explore strategies for improving any items in need of this focus.*
	Gather opinion information from peer group facilitators on member feedback - newsletters, website and other offerings.	*Surveys of peer group facilitators where we ask about the feedback that they receive on newsletters, website and other peer program offerings.*
	Have the team ensure accurate recording of attendances for all sessions/events within a centrally located (protected) file/portal.	*Use the attendance file to analyse attendance across groups and topics to ensure each group (ie location) and topic (for relevance) brings in appropriate/expected attendance levels.*
	Gather opinion information from peer group members on program offerings and their benefits.	*Surveys of peer group members asking about newsletters, website and other program offerings feedback. Include ratings data to assess if members feel they are learning from them, if they are relevant, etc. Part of annual member survey.*
OBJECTIVE 4: We offer informal advocacy and advice resulting in referrals that are accurate and timely.	Number of phone and face-to-face advocacy/advice sessions provided to be recorded.	*Have the team ensure accurate recording of attendances for all advocacy/advice sessions or phone calls within a centrally located (protected) file/portal. Investment can then be assessed.*
	Gather opinion information from members on advocacy received and referrals provided to them by peer facilitators.	*Surveys of peer members asking about any advocacy assistance they have received and about any referrals or other assistance provided by facilitators or other peer team members. Include ratings data to assess if members feel they received what they needed or not. Ask if there were outcomes from the referral or informal advocacy. Include in annual member survey.*
OBJECTIVE 6: We offer members a welcoming, safe and supportive environment. *NB: Shared with Funders perspective)*	Gather opinion information from peer group members on how welcomed, safe and supported they feel in the group.	*Surveys of peer group members asking 'do you feel welcome in your peer group?' and 'do you feel supported within your peer group?'. Target = 85% of members agree they are welcomed and feel supported in their group. Could be part of an annual member survey.*
	Gather opinion information from peer group facilitators on techniques used to build group cohesiveness.	*Surveys of peer group facilitators where we ask what they do to build a group where members feel welcomed and supported. Could form part of an annual peer facilitator survey, which can then be used for training planning also.*
	Gather opinion information from peer group members who have stopped attending a group.	*Surveys of peer group members no longer attending asking 'did you feel welcome in the group?', and 'If not, why?' and 'what could have helped you feel more welcomed?' and alike.*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
OBJECTIVE 7: New member join our groups and those that depart provide positive feedback on their peer experience.	Gather opinion information from peer group facilitators on the group membership and change in members.	*Surveys of peer group facilitators where we ask about the members in their group including who has left (and why) and if new members have joined (and if they know, how they found out about the group OR why they joined). Ask about any other issues that could affect their group membership.*
	Gather opinion information from peer group members who have stopped attending a group.	*Surveys of peer group members no longer attending asking 'why did you stop attending the group?', and 'what could have been better in the group?' and alike.*
	Have the team ensure accurate recording of attendances for each group within a centrally located (protected) file/portal.	*Use the attendance file to analyse attendance across groups to ensure each group has appropriate/expected attendance levels.*
	Number of new members across the various peer groups offered.	*Ensure attendance file includes recording of new members. Analyse across groups and topics to ensure each group brings in new members regularly. Check they also continue to attend.*

SELF STUDY Q5.9:

Using your answers to Questions 4.9, 4.10 and 4.11, complete the first two columns of this table. Next use the examples in the table above and your learnings from this package to complete the table columns:

- Indicators: Define each measure (or indicator) you could use to assess this objective as clearly as possible.
- Evidence Collection Strategy: Here you should list the process you will follow to gather evidence on this measure. Will you use a survey, interview of other method? Is there an existing source of evidence you can access and use?
- Tools & Frequency: Tools to be developed should be listed and described. How frequently you will plan to use the tools or other evidence collection methods should be listed here also for consideration.

QUESTIONS 4.9 & 4.10: Four MEMBER **Objectives**	**QUESTION 4.11:** Measure for each & measurement notes	**Indicators:** Define Measure to be used	**Evidence Collection Strategy**	**Tools** to be developed; **Frequency** & other notes to be considered
MEMBERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR MEMBERS (& POTENTIAL MEMBERS)?				
OBJECTIVE 1:				
OBJECTIVE 2:				
OBJECTIVE 3:				
OBJECTIVE 4:				

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
BUILD: TO ACHIEVE OUR VISION, WHAT MUST WE BUILD INTERNALLY?		
OBJECTIVE 1: Our IT infrastructure meet our needs as an innovative, growing charity.	Gather opinion information from program team members on the IT system available to them.	*Surveys of peer program team members where we ask about the IT system and IT resources they are using and if they assist them in their role. If not, what do you they need? Do they need training (and, if so, in what areas)? Do they have ideas about IT used?*
	Have the evidence collection team collect IT training data, feedback, system investments.	*Use information gathered to assess level of investment in IT, use of available resources, overall training and its outcomes and any other feedback evidence to conclude if IT needs are being met.*
	Gather opinion information from peer group facilitators on the IT system available to them.	*Surveys of peer group facilitators where we ask about the IT system and IT resources they are using and if they assist them in their role. If not, what do you they need? Do they need training?*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
	Gather opinion information from peer organisation Board members on the IT system outputs provided to them.	*Surveys of Board members asking about the IT system outputs they receive and if it assists them in their role. If not, what do you they need? Do they need training (and, if so, in what areas)?*
OBJECTIVE 2: We effectively manage our member database and the new member process is professional and consistently performed.	Number of new members across the various peer groups offered.	*Ensure attendance file includes recording of new members. Analyse across groups and topics to ensure each group brings in new members regularly. Check they also continue to attend.*
	Have the evidence collection team collect new members' data, including method and package.	*Use information gathered to assess whether new members are joining according to process. Review evidence on where members are coming from (referral source). Review evidence on new member process being followed (and if not, why this could be).*
	Number of new members across the various peer groups offered.	*Ensure attendance file includes recording of new members. Analyse across groups and topics to ensure each group brings in new members regularly. Check they also continue to attend.*
	Gather opinion information from new peer group members on their joining process.	*Surveys of new peer group members if they received a new member package and, if so, how soon after joining. Also ask about why they joined, if needs are being met. Part of annual member survey.*
OBJECTIVE 3: Our office & session facilities are secure, safe and clean spaces.	Gather opinion information from program team members on their office and other peer program spaces.	*Surveys of program team members where we ask about their office and other built environment resources. Are they suitable and, if not, what do you they need?*
	Gather opinion information from peer group facilitators on the peer group spaces used.	*Surveys of peer group facilitators where we ask about the group space used and if it meets the need of their group. If not, what do you they need?*
	Gather opinion information from peer group members on their group space (or other spaces used for the peer program).	*Surveys of peer group members asking about their group location space used and any other spaces they access. Could be part of an annual member survey; go to new and departed members also.*
OBJECTIVE 4: Our peer program has clear policies and procedures that support, and protect, both our members and our team.	Gather opinion information from program team members on their policy knowledge and the ways they use it in their role.	*Surveys of program team members where we ask about their knowledge of specific policies, procedures and the ways in which they enable them to perform their duties. Are they suitable and, if not, what new policies or revisions are needed?*
	Gather opinion information from peer group facilitators on their policy knowledge and the ways they use it them in facilitation.	*Surveys of peer group facilitators where we ask about their knowledge of specific policies, procedures and the ways in which they enable them to perform their duties. Are they suitable and, if not, what new policies or revisions are needed?*
	Gather opinion information from peer group members on items related to policies/procedures.	*Surveys of peer group members asking about 1-2 policy applications they should be impacted by, and if it is not working ask questions about what may be missing or not being followed.*
OBJECTIVE 5: We continually improve and develop our programs, including our support materials, research expertise and evidence,	Gather opinion data from peer group members on information they receive and programs they attend.	*Surveys of peer group members asking questions relating to the information they are provided with, and overall program satisfaction. Could be part of an annual member survey.*
	Gather opinion information from peer group facilitators on the information they provide, their expertise and experience.	*Surveys of peer group facilitators where we ask about the information they deliver and the training they receive as well as level of facilitation experience. Could form part of an annual peer facilitator survey used for training planning additionally.*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
professional training resources and other materials or program resources.	Gather opinion information from peer team members on program development, their expertise and experience.	*Surveys of peer team members asking questions on program development as well as their expertise, experience, training and qualifications. Could form part of an annual peer member survey used for performance review purposes also.*
	Have the evidence collectors review content delivered and its rate quality/relevance.	*Use information delivery documentation to assess relevance and quality using clear guidelines that are consistently applied. Explore strategies of improving information or sharing the best.*

SELF STUDY Q5.10:

Using your answers to Questions 4.12 and 4.14, complete the first two columns of this table. Next use the examples in the table above and your learnings from this package to complete the table columns:

- Indicators: Define each measure (or indicator) you could use to assess this objective as clearly as possible.
- Evidence Collection Strategy: Here you should list the process you will follow to gather evidence on this measure. Will you use a survey, interview of other method? Is there an existing source of evidence you can access and use?
- Tools & Frequency: Tools to be developed should be listed and described. How frequently you will plan to use the tools or other evidence collection methods should be listed here also for consideration.

QUESTIONS 4.12: Two BUILD **Objectives**	**QUESTION 4.14:** Measure for each & measurement notes	**Indicators:** Define Measure to be used	**Evidence Collection Strategy**	**Tools** to be developed; **Frequency** & other notes to be considered
BUILD: TO ACHIEVE OUR VISION, WHAT MUST WE BUILD INTERNALLY?				
OBJECTIVE 1:				
OBJECTIVE 2:				
OBJECTIVE ______:				

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
LEARNING: TO ACHIEVE OUR VISION, NOW & IN THE FUTURE, WHAT MUST WE LEARN?		
OBJECTIVE 1: National and international conference attendances and presentations are sought, secured and funded.	Accounting records are used to measure investment in travel and conference attendance.	*Use Accounting system evidence. Ask the Finance team to provide total conference travel and attendance for peer program team and/or facilitators when the Annual Report is finalised.*
	Have the evidence collection team gather information on number of presentations, attendances, articles published.	*Use documentation to gather evidence on team's output of presentations, publications and research session attendances.*
	Gather information from peer team members on their submissions and presentations.	*Surveys of peer team members asking questions on program development as well as their expertise, experience, training and qualifications. Could form part of an annual peer member survey used for performance review purposes also.*
OBJECTIVE 2: We have a trained, motivated and empowered team including volunteers that are flexible across multiple roles.	Gather opinion information from peer team members on their expertise, satisfaction, flexibility and motivation.	*Surveys of peer team members asking questions on their role and organisation satisfaction, flexibility across roles, motivation and plans. Could form part of an annual peer member survey used for performance review purposes also.*
	Record number of regular and new volunteers within programs.	*Use volunteer registrations and documentation to assess number of volunteers and new volunteers used across peer programs.*
	Gather opinion information from peer group facilitators on their expertise, satisfaction and motivation.	*Surveys of peer group facilitators where we ask about on their role and organisation satisfaction, flexibility to take on other peer roles, motivation and plans. Could form part of an annual peer facilitator survey used for training planning additionally.*
	Gather opinion information from all program team members about their working situation.	*Focus group is held for all team members where we discuss the peer organisation's 'internal environment', their flexibility, motivation and checking for any issues that may need resolving.*
	Gather opinion information from volunteers on their expertise, satisfaction and motivation.	*Surveys of volunteers where we ask about on their role and organisation satisfaction, flexibility to take on other roles, motivation and future plans. Could explore annual volunteer surveys to be used for training planning and other needs.*
OBJECTIVE 3: Our organisation develops leading edge information topics.	Number of new topics.	*Use documentation and calendar schedule information to record number of new topics offered each year along with analyse the feedback/idea that led to their development.*
	Number of new topic deliveries annually.	*Use documentation and calendar schedule information to record number of new topic sessions delivered each year along with attendance information by topic (if available).*
	Gather opinion information from peer group members on information they receive.	*Surveys of peer group members asking 'are you provided with relevant information in your peer group?' and 'do you want to receive different information in your peer group?' and perhaps ask them to rate information provided in terms of quality or relevance using rating scale question(s). Target = 85% of members agree they receive high quality relevant information. Could be part of an annual member survey.*
OBJECTIVE 4: Our peer team explores new opportunities and develops new projects.	Number of submissions and the number of those that are successful are collected by team.	*Use documentation, such as Board Minutes who would approve new projects, to record number of new submissions each year along with the number of those that are successful.*
	Training of a growing number of members in grant submissions	*Surveys of peer team members asking questions about submission writing expertise, relevant training received, and*

Objectives	Possible Indicators	Possible Collection Strategy &/or Tools NEW
	and them gaining relevant submission writing experience.	*number of submissions undertaken each year. Part of an annual peer member survey also used for performance evaluation.*
OBJECTIVE 5: We regularly explore organisational collaborations and grow links over time.	Gather opinion information from peer team members on collaborations or other links.	*Surveys of peer team members asking questions about the ways in which they link in with, or collaboration with, other organisations. Could form part of an annual peer member survey used for performance review purposes also.*
	Gather opinion information from Board members on attitudes on collaboration and linking with other organisations.	*Focus group held with members of the peer organisations Board discussing organisational collaborations, links, and future plans regarding both. Also investigate current level of collaboration and whether this is encouraged across the peer organisation or not.*

SELF STUDY Q5.11:

Using your answers to Questions 4.15 and 4.16, complete the first two columns of this table. Next use the examples in the table above and your learnings from this package to complete the table columns:

- Indicators: Define each measure (or indicator) you could use to assess this objective as clearly as possible.
- Evidence Collection Strategy: Here you should list the process you will follow to gather evidence on this measure. Will you use a survey, interview of other method? Is there an existing source of evidence you can access and use?
- Tools & Frequency: Tools to be developed should be listed and described. How frequently you will plan to use the tools or other evidence collection methods should be listed here also for consideration.

QUESTIONS 4.15: Two LEARNING **Objectives**	**QUESTION 4.16:** Measure for each & measurement notes	**Indicators:** Define Measure to be used	**Evidence Collection Strategy**	**Tools** to be developed; **Frequency** & other notes to be considered
LEARNING: TO ACHIEVE OUR VISION, NOW & IN THE FUTURE, WHAT MUST WE LEARN?				
OBJECTIVE 1:				
OBJECTIVE 2:				
OBJECTIVE ______:				

CAPSULE: ONCE YOU ARE CONFIDENT THAT YOU HAVE KEY OBJECTIVES IDENTIFIED UNDER EACH PERSPECTIVE, THERE ARE MANY WAYS OF MEASURING YOUR PERFORMANCE AGAINST THEM. FOCUS YOUR ENERGIES AND RESOURCES ON THOSE YOU CONSIDER MOST CRUCIAL FOR THE ONGOING SUCCESS (OR SUSTAINABILITY OR SURVIVAL IF IN DOUBT) OF YOUR PROGRAM.

CHEAP AND CHEERFUL COLLECTION

By now, you are probably wondering how you are going to afford the time and money, as well as the required expertise, to design/establish your own evidence-gathering approach. Doing a completely tailored evaluation does take a great deal of planning and resources. However, sound information can be collected simply and by using existing tools. There are many great options for gathering evidence on peer support programs, which have already been developed by other organisations, available for your use. Some could be used 'off the rack' while others may need a little shaping to ensure you secure the information you need. It all depends on what you are trying to measure, and what is most appropriate for your own program.

One example that can be adapted for your use is a Member survey developed by Families4Families that links in with essential ILC Outcome objectives relevant to their specific peer program.


Families4Families Inc.

ILC Outcomes Individual Surveys – Available upon request or from the PeerConnect website.

In addition, this survey was adapted for use at peer support group meetings, where the facilitator could ask the key questions of the whole group and note responses on the form. This can also be adapted for your use if this is relevant to your objectives and your specific peer program.

ILC Outcomes Group Survey – – Available upon request or from the PeerConnect website.

The Peer Connect website was collaboratively developed during the NDIA's DSO project and led by JFA Purple Orange, who was the DSO Project Lead Agency (see https://www.peerconnect.org.au). The site is full of helpful quick guides, including one, specifically aimed at gathering evidence from peer group members (see https://www.peerconnect.org.au/setting-and-running-peer-networks/maintaining-network/how-was-it-you-evaluation-form-peer-meetings/, and https://www.peerconnect.org.au/setting-and-running-peer-networks/background/peer-networks-what-they-are-and-how-they-can-help/).

Many peer organisations have shared their tools for use by other like-minded peer organisations and these are available on the PeerConnect package content.

The Chronic Illness Alliance offers a free course online for peer leaders (see http://www.peerleadersonlinetraining.net/). This is designed to be used as a resource to help build the capacity of an existing one. The site also includes other training courses, as well as, a range of resources including a peer support evaluation tool. They also offer an excellent peer group handbook including a good summary of evaluations (see http://www.chronicillness.org.au/wp-content/uploads/2016/06/Best-Practice-Framework-Web.pdf in section 6).

The 'Youth Worker Evaluation Ideas 2015' resource provides simple and easy ideas for undertaking evaluation with young people. It provides adaptable templates for qualitative evaluation along with engaging participatory activities. You can easily download the Youth Worker Evaluation Ideas 2015 from:

https://siren.org.au/wp-content/uploads/2016/08/Youth-Worker-Evaluation-Ideas_Jun2015.pdf and adapt the items for your use as needed.

Internationally there are also a huge range of resources available. For example, the Peers for Progress site (see http://peersforprogress.org/take-action/evaluate-peer-support/#find) list a range of resources available online. These include not only example tools but also overall evaluation plans (or 'protocols'):

- The Peer Education Evaluation and Resources Center (PEER Center) is a national resource and evaluation center for people living with HIV and organization interested in PEER education training programs. Its section on Resources for Peer Programs has evaluation instruments.
- Peer Outcomes Protocol Project's administration manual was developed as a way to evaluate community-based, mental health peer support programs. Each module in the manual describes how to conduct interviews, use questionnaires, and analyse the data collected in order to better focus on improving quality of life and peer supports for people with psychiatric disabilities
- The National Diabetes Program Evaluation Framework describes how to design an evaluation of a multifaceted public health education program. This framework has helped program planners and evaluators develop measurable short-term and long-term outcomes.
- This 2006 article from Prevention Chronic Disease describes methods and approaches to program evaluation.
- Section K: Program Evaluation (pg. 57) of the Mentoring Partnership Program Manual describes how to develop a plan for program evaluation.
- Annex 2 and Annex 3 of this peer mentor training manual include example pre- and post-training tests to rate the quality of the training and also peer educator and trainer evaluation forms.
- Appendix 1 (pg. 176) of this peer supporter training manual includes a checklist for observers evaluating peer supporters in training.
- The Robert Woods Johnson Foundation Diabetes Initiative provides resources on project participant assessment, pre-test and post-test questionnaires and other program evaluation tools
- The University of Kansas Community Tool Box provides a number of evaluation resources including Evaluating Community Programs and Initiatives, Developing Training Programs for Volunteers and Evaluating the Trainees, and a Trainee Evaluation Form and Checklist.
- The U.S Centers for Disease Control and Prevention Evaluation Working Group provides a host of descriptive information and practical tools for a program evaluation framework.

In addition, there are a range of tools provided on the MyPeerToolkit site (http://mypeer.org.au/tools/) which are for use when evaluating peer programs delivered in a camp setting to children. Yet many of the tools could be easily adapted for use within peer organisations, and are easily accessed via a range of sub-headings including: tools for external use, participant evaluation, participant use and for staff/volunteer use. The site also conveniently lists tools that they know about but have not themselves developed, and this is another good resource to start with (see http://mypeer.org.au/participant-use/other-program-evaluation-tools/).

The World Health Organisation has also published a large number of workbooks that were developed to assist with the assessment of substance abuse treatment programs of which many utilise peer support techniques. The range includes an introductory 'Framework Workbook' but then includes workbooks on planning evaluations and implementing evaluations followed by a series of specialised workbooks (see the Planning Workbook here: http://apps.who.int/iris/bitstream/handle/10665/66584/WHO_MSD_MSB_00.2b.pdf;jsessionid=5B43605EF50AA58BEB5AD85F1A92996D?sequence=2). These workbooks provide excellent self-help questions and case studies providing a strong knowledge base for those learning these skills.

CAPSULE: UTILISING THE WORK OF YOUR PEER ORGANISATIONS IS A USEFUL TECHNIQUE TO AVOID A LARGE INVESTMENT IN UNIQUE TOOLS. JUST BE SURE YOU ADAPT THEM AS REQUIRED FOR YOUR USE, AND RECOGNISE THE ORIGINAL SOURCE.

IN SUMMARY

Peer support organisations share a common strong rights-based foundation and a philosophy of delivering good practice support. Previously, we have considered where your programs want to be, what evidence we need to understand where you are currently, and how far there is to your desired destination. This involved a series of steps and decisions that will be unique to your own organisation and was guided by the four perspectives of the Balanced Scorecard (BSC).

The BSC and its four perspectives were used to structure our selected objectives. For each objective, we then needed to select an indicator, which will inform us about that objective. Each needs to be able to be measured in some way, so that we can see how close or far away, we are, from our vision. In this module, we have explored the vast array of options available for selecting measures to use, as well as the technique employed to perform the assessment. In addition to gaining an understanding of the various types of tools and method of information collection, we also considered some of the basics involved in developing relevant and tailored tools.

Therefore, we should now have a reasonable understanding of how we can collect our chosen evidence. The time has come for moving beyond these tools and the specifics of gathering evidence. We now continue our journey and investigate in more detail the ways we can utilise the information we have collected.

RESOURCES

- Information on ethical considerations when gathering information from people is discussed at http://mypeer.org.au/monitoring-evaluation/ethical-considerations/ and on the Better Evaluation site: https://www.betterevaluation.org/en/rainbow_framework/manage/define_ethical_and_quality_evaluation_standards.
- The World Health Organisation Workbooks are available from: http://whqlibdoc.who.int/hq/2000/WHO_MSD_MSB_00.2a.pdf?ua=1.
- Data types are discussed in detail at: https://sites.google.com/site/geographyfais/fieldwork/data-collection/types-of-data.
- The peerconnect site (https://www.peerconnect.org.au/) provides links through to a large range of videos on peer support: see for example: https://vimeo.com/175482986) (benefits from peer support); https://vimeo.com/211823631 (a story on how peer support helped a member build a better life); https://vimeo.com/244582509 (on staying connected with peer members); https://vimeo.com/210181126 (on establishing new peer support group); https://vimeo.com/193004242 (on a youth peer support group); https://www.youtube.com/watch?v=z43OWZYKv1k (on a deafblind peer support group); http://www.cdah.org.au/this-is-my-world/ (a hip hop peer support film recently launched; and, https://vimeo.com/214936558 (a personal story on peer support and volunteering).
- There are multiple forms of creative strategies outlined online: http://mypeer.org.au/monitoring-evaluation/data-collection-methods/creative-strategies/ and photo mapping at: https://adf.org.au/insights/creative-evaluation/.
- Circle of Support resources are available at: https://www.asid.asn.au/Portals/0/Conferences/NZ2010/Circles%20of%20Support%20for%20People%20with%20Disability%20-%20Ainslie%20Gee.pdf AND http://communitylivingproject.org.au/circles-initiative/.
- See the Tutti website for examples of performance art for stories: http://tutti.org.au/.
- An example of use of Creative Strategies is available (Case Study 4) here: http://mypeer.org.au/monitoring-evaluation/evaluation-case-studies/ while additional references on 'Creative Strategies' are here:
  - Dennis, S., S. Gaulocher, R. Carpiano and D. Brown. 2009. Participatory photo mapping (PPM): Exploring an integrated method for health and place research with young people. Health and Place 15: 466-473.
  - Chio, V. & P. Fandt. 2007. Photovoice in the diversity classroom.

- McCarty, C., J. L. Molina, C. Aguilar and L. Rota. 2007. A comparison of social network mapping and personal network visualization. Field Methods 19 (2): 145-162.
- Butts, C. 2008. Social network analysis: A methodological introduction. Asian Journal of Social Psychology 11(1): 13-41.
- Foster, S. L., H.M. Inderbitzen and D.W. Nangle. 1993. Assessing acceptance and social skills with peers in childhood: Current issues. Behavior Modification 17 (3): 255–286.
- Borbely, C. J. G., Nichols, J.A., Brooks-Gunn, T., Botvin, J., and Gilbert, J. (2005). “Sixth Graders’ Conflict Resolution in Role Plays with a Peer, Parent, and Teacher”. Journal of Youth and Adolescence 34 (4): 279-291.
- Dodge, K. A. and C. L. Frame. 1982. Social cognitive biases and deficits in aggressive boys. Child Development 55: 163–173.
- Dodge, K. A., C.L. McClaskey and E. Feldman. 1985. A situational approach to the assessment of social competence in children. The Journal of Consulting & Clinical Psychology 53: 344–353.
- http://www.globalcollage.com/
- Cancienne, M. B. & C.N. Snowber. 2003. Writing rhythm: Movement as method. Qualitative Inquiry 9 (2): 237-253.
- Blumenfeld-Jones, D. S. 1995. Dance as a mode of research representation. Qualitative Inquiry 1 (4): 391-401.
- Hughes, S. 2009. Leadership, management and sculpture: how arts based activities can transform learning and deepen understanding. Reflective Practice 10 (1): 77–90.

- An overview on the characteristics of good information is available at: www.jhigh.co.uk/Intermediate2/Using%20Information/12_charact_of_info.html.
- You can read further on what makes ‘good evidence’ on the Better Evaluation website, for example: https://www.betterevaluation.org/en/resources/research-paper/what_counts_as_good_evidence.
- Tools available for adaption include an ILC Outcomes Individual Survey – available here in PDF format or available here in WORD format AND an ILC Outcomes Group Survey – available here in WORD format (for adaption) or available here in PDF format.
- Peer organisations have shared their tools for use by other like-minded peer organisations and these are available on the Package site (peerconnect.org.au).

CAPACITY BUILDING FOR PEER SUPPORT

SIX: BEYOND THE TOOLS

SECTIONS:

- Beyond the Tools Introduction
- Collating Different Evidence Types
- Collating Evidence for Different Audiences
- Example: Objectives, Measures and Analysis Options
- In Summary
- Resources
- Self Study Questions

BEYOND THE TOOLS INTRODUCTION

We started our journey into evidence collection considering where you want your peer program to be. This has involved a series of steps and decisions unique to each peer organisation. The four perspectives of the Balanced Scorecard (BSC), which structured our program objectives, guided these. We then thought about what we would assess and how we would assess them. The whole purpose is to ensure we can gather the evidence we need for the ongoing success of each customised program.

We have explored a vast array of options available for selecting measures to use as well as the techniques used to perform the assessment. In addition to gaining an understanding of the various types of tools and method of information collection, we also contemplated some of the basics involved in developing relevant and tailored tools. Hopefully you now feel a greater confidence about gathering evidence and have a reasonable understanding of the ways we can harvest the information we want.

In this section of the training package we move beyond these tools and the specifics of gathering evidence and delve into how we can utilise the information we have accumulated. We will focus on simple information presentation techniques. Naturally, the nature of information we pull together will determine the way we draw upon it. I am sure it pleases many of you that this is not a statistics course. Therefore, even if you have a large pool of quantitative data, we will limit our coverage to simple presentation methods, including Excel spreadsheets, for analysing it and applying your valuable evidence. This is because very few peer organisations will have access to statistical software or data analysis expertise.

> **If you require additional data analysis information, there are significant resources available online. See for example https://www.betterevaluation.org/en/rainbow_framework/describe/analyse_data which provides an excellent overview of data analysis methods for both quantitative and qualitative data within evaluation.**

COLLATING DIFFERENT EVIDENCE TYPES

At every stage of the evidence gathering process, being able to plan-ahead means it becomes possible to make precise decisions about our evidence usage. Then, we will be more likely to only gather relevant, useable and required evidence and ensure our tools are ideal for our needs. Remember, we only want to gather information if it tells us something about where we are on our journey. If evidence doesn't help us with our navigation then it is doubtful we should be spending our precious, limited resources, on its collection. As noted in their recent report, Amaze (2018, p.30) confirm the importance of quality data acquisition:

> (d) Evaluation
>
> Robust evaluation is essential to quality program design and implementation, as well to demonstrating impact and ensuring program sustainability (Peers for Progress, 2018; Dykes F et al, 2005). However, a lack of methodological rigor and robust evaluation has limited the quality of evidence regarding peer support programs to date.
>
> There is consistent emerging evidence that a more systematic, rigorous and robust approach to evaluation of peer support programs is required, including the following core elements: identification of evaluation model(s) at the outset; mixed-methods evaluation; realistic and holistic measures/ indicators; quality data collection; and economic evaluation.
>
> Engagement by participants and other relevant stakeholders in the development and implementation of an evaluation model is essential.

We have previously discussed the types of information we hope to collect. We differentiated between primary and secondary information based on its source. Secondary data involves gathering information which has been already compiled previously in some way. For example, if a peer program objective is responsible budgetary management, a selected indicator may be a variance (i.e. the difference between budgeted spending and actual spending). This information is likely already calculated for Board or Finance Committee meetings and reporting. If we use this variance data to assess this objective then we are using secondary data for this evaluation. Secondary evidence may be numerical or in the form of quotes from reports or emails, or comments in a reflection journal. Primary data is relevant information that comes from the project using purposeful observations and measurements collected (such as from a survey).

Evidence will form the basis of each thorough investigation of where your peer program is currently located and may involve the collection of qualitative and/or quantitative primary information. Quantitative information is collected through measurement and is able to be processed using computational, statistical or other techniques. This contrasts with qualitative information with is gathered using observation or subjective judgment and does not involve measurement (at least immediately). Qualitative information may be processed or quantified where appropriate or it may be presented through images or as text (such as quotes by Members, or feedback from Funders). The type of information collected should be determined by the objective itself and the indicator selected. The following table provides an excellent overview of the core differences between qualitative and quantitative information in relation to its aim, characteristics, data collection methods and data analysis focus (Save the Children booklet, 2017, p.10). In the context of this resource for peer disability support, when it comes to gathering information from primary sources, we have been focussing on key collection methods including the popular tool of 'surveys'.

SELF STUDY Q6.1: Refer to the tables you developed in Questions 5.8, 5.9, 5.10 and 5.11.
What types of evidence gathering tools are you planning to use in your planned evaluation?
If this includes a survey, what types of questions can you ask?
What sort of information will you collect from each of the different types of questions you will ask?

You can ask numerous kinds of questions in a survey; this results in a variety of information. Questions within the survey can be: closed, open-ended, scaled or multiple-choice. As discussed in earlier sections of this training package, each provides us with very distinctive evidence. Therefore, the way we analyse the responses to each are different.

	Qualitative research	Quantitative research
Type of knowledge	Subjective	Objective
Aim	Exploratory and observational	Generalisable and testing
Characteristics	Flexible	Fixed and controlled
	Contextual portrayal	Independent and dependent variables
	Dynamic, continuous view of change	Pre- and post-measurement of change
Sampling	Purposeful	Random
Data collection	Semi-structured or unstructured	Structured
Nature of data	Narratives, quotations, descriptions	Numbers, statistics
	Value uniqueness, particularity	Replication
Analysis	Thematic	Statistical

As noted already, how you employ your data will depend on its type and the way you collected it. This section covers some basic information on how to work with the evidence you have collected with your surveys. One of the sample surveys available for download earlier in this training package included an Individual ILC Survey developed by the author whilst responsible for delivery peer programs within Families4Families (available on the PeerConnect site). We will now analyse data that could have collected from this survey, using simple techniques. The first questions are open-ended and includes a range of closed ended ratings questions.

Families4Families Inc.

Acquired Brain Injury Peer Support Network

1. Why did members present join Families4Families & the Local Support Group?

2. What benefits do the group members present receive from being a member of Families4Families and this Local Support Group?

3. How many people present believe they are likely to be assessed (or have already been assessed) as eligible for an NDIS Individual Funded Package?

(please complete each box)

NDIS YES ☐ NDIS NO ☐ MAYBE ☐

Any Comments:

4. Have the members present gained skills, knowledge and/or abilities from being a Families4Families member?

YES ☐ NO ☐ MAYBE ☐

Please tell us more:

5. Have members present gained knowledge about their rights and/or entitlements from being a Families4Families member?

YES ☐ NO ☐ MAYBE ☐

Please tell us more:

Surveys often feature an assortment of different questions: closed, open, multiple-choice and rating ones. Closed questions are usually in the format of yes/no or true/false options giving limited responses making them quick and easy to process and collate. After you have collected survey data, you will need to put it into a format ready for analysis. For close-ended data, this means converting answers to surveys into numbers. For example, if the question is 'Do you like attending your peer support group?' and you offer only 'Yes' or 'No' as responses, you can decide to enter all the 'Yes' answers as 1 and 'No' answers as 0. You now have data, which you can collate and use in different ways. For example, you can easily now determine the percentage of responding group members who 'like attending their peer support group'. Once the numbers are entered into a simple spreadsheet, creating a database, you can use it to analyse the data. Typically, databases have the names of each survey question in columns along the top row, and each survey response is entered as a row. An example of this is shown below and is presented as an incomplete spreadsheet (with the questions in the top column) available here:

Q1. Why did you join Families4Families and your Local Support Group?	**Q2. What benefits do you receive from being a member of Families4Families and your Local Support Group?**	**Q3. Do you believe you will be asessed (or have already been assessed) as eligible for an NDIS Individual Funded Package?**	**Yes**	**No**	**Maybe**	**Q4. Have you gained skills, knowledge and/or abilities from being a Families4Families member?**	**Yes**	**No**	**Maybe**
I needed social contact with other carers and a network of support for my daughter.	The social interaction for both of us and the ongoing support of people with similar problems is immeasurable. Every outing or meeting has always been full of love and laughter and the knowledge that we are never alone.	We have recently began having a cleaner fortnightly but that is the only servocde we have access since rehab in 2006.	0	0	1	Despite not needing to access available services it is reassuring knowing that we have the ability of finding any we may need in the fututre thanks to information available through F4F staff and members.	1	0	0
To be among peers facing similar challenges.	Laughter!		1	0	0	To appreciate what my brain & body can still do for me.	1	0	0
The information provided. Shown how to negotiate govt depts. General education of the ABI field.	Support that you are not alone. You are not isolated.		0	1	0	Learnt to cope with support workers. Having support of other members as well as volunteer staff.	1	0	0
Was introduced to Families4Families and our local support group by a friend.	I love our monthly get togethers and he support and information I receive, and our family, is invaluable.		0	1	0	Knowledge and support from Families4Families is brilliant.	1	0	0

Open-ended questions leave the answer entirely up to the respondent and therefore provide a greater range of responses. While open questions enable the respondent to answer freely and gives greater choice of responses, the data is then more difficult to collate or group. Open-ended data can also be entered into a spreadsheet in the same format, with wider columns to make space for larger amounts of text. Alternatively, you could type survey responses into a text document (Microsoft Word, Google Docs, or Open Office) and organise them there. When you're typing written survey responses, be sure to type the responses exactly as they are written so you can be sure you are preserving the person's intended meaning. You can also then show them as quotations in your reports or in your other publications and materials. If you can't read a person's writing, you can indicate that in the data entry box or document using brackets or notes.

SELF STUDY Q6.2:
Give two advantages of using a closed ended question in a survey, and two disadvantages.
Give two advantages of using an open ended question in a survey, and two disadvantages.

SELF STUDY Q6.3:
What types of questions will you include in any surveys you need to develop to gather your evidence?

Surveys can also utilise scales to assess attitudes. Semantic scales (where responders are asked to rate subjectively something from 1 to 5) are also widely used. For example, 'how connected do you feel with your peer group' on a scale of 1 to 5 (when 1 is not at all connected, and 5 is extremely connected)? Most scales include this information so the respondent knows exactly how to answer each question. Scales ranging from 1 to 5 (or 1 to some other number) are commonly used and may be called 'Likert Scales'. We may also wish to assess a scale for questions such as those shown below. In this case, we offer an alternative to only YES or NO which we can call MAYBE or UNSURE.

For further information on Likert (or rating) scales see http://www.peerrespite.net/toolkit/#Step3.

For an example, let's view the Individual ILC Survey developed by the author whilst responsible for delivery peer programs within Families4Families (available on the site). We will now analyse data that could have collected from this survey, using simple techniques. The first questions are open-ended and the survey also includes a range of closed ended questions.

Question			
6. Do you feel that Families4Families effectively promotes the independence and full participation of people with ABI in the community?			
7. Has being a Families4Families member enabled you to access information that help you to better understand ABI?			
8. Does Families4Families offer high quality peer support?			
9. From your member experiences, do you believe that the Families4Families team are well qualified, knowledgeable and have the experience to effectively deliver peer support?			
10. Has being a member helped you to know more about what services and supports are available to in enabling you to live your best life?			
11. Has being a member given you the information you need to make decisions in your life?			

We can again code these responses into numbers in the spreadsheet. We may decide that YES can be coded as 2, MAYBE as 1 and NO as 0. As long as we use these numbers with caution as it may not be true that a yes response is the same as double the maybe response. We may instead prefer to code them in different columns, as shown below. When this survey was used within Families4Families we set up columns for each possible response and were able to then calculate response percentages. The spreadsheet used for this analysis illustrates the use of this coding option:

Q6. Do you feel that Families4Families effectively promotes the independence and full participation of people with ABI in the community?	Yes	Maybe, Not sure	No	**Q7.** Has being a Families4Families member enabled you to access information that help you to better understand ABI?	Yes	Maybe, Not sure	No	**Q8.** Does Families4Families offer high quality peer support?	Yes	Maybe, Not sure	No
	1	0	0		1	0	0		1	0	0
	1	0	0		1	0	0		1	0	0
	1	0	0		0	1	0		1	0	0
	1	0	0		1	0	0		1	0	0
	1	0	0		1	0	0		0	1	0
	1	0	0		1	0	0		1	0	0
	1	0	0		1	0	0		1	0	0

Multiple-choice questions can also be used. For example, we could ask respondents to indicate their favourite topic covered in the peer group, or their preferred location. Again, we can convert these answers into a number. For something like the favourite topics question, it might make sense to scale the topic selected as favourite as 1, the next 2, etc. Then we could sort according to most popular by person and across all respondents from the same group, and across all respondents. Once more, this will depend upon the objective we are trying to assess via this question within this tool.

Using this approach assumes that you have access to a computer and a spreadsheet program for your data analysis. While most peer organisations are likely to likely to use Microsoft Excel for this purpose, there are also some free programs available such as Google Sheets (see: https://www.google.com/sheets/about/) or Open Office (see: http://www.openoffice.org/).

The Better Evaluation has a LINK to a tool which assists in calculating basic statistics within the EXCEL package: https://www.betterevaluation.org/resources/tools/summary_statistics/calc_mean_st_dev.

In addition, it is possible to set up a large table within a word processing package and enter the data using this method. Finally, it is also possible to analyse data using simple pencil and paper. Draw up a table with a box for each answer, and either tick or write the response for each.

There are a range of online survey development options also available; perhaps you have you heard about 'Survey Monkey' or another similar option? Many will offer a range of sophisticated options for paid versions but also offer simple and free alternatives. There are also online resources which compare the various options available.

See for example: https://www.wordstream.com/blog/ws/2014/11/10/bestonline-survey-tools for an excellent and quick overview of the available options.

Google Forms is currently a leading option in terms of offering excellent features within its lowest cost version: unlimited surveys and respondents, survey answers and data are automatically collected in Google Spreadsheets, great design options including themes and ability to use your own logo or add images, as well as the ability to imbed surveys into both emails and websites.

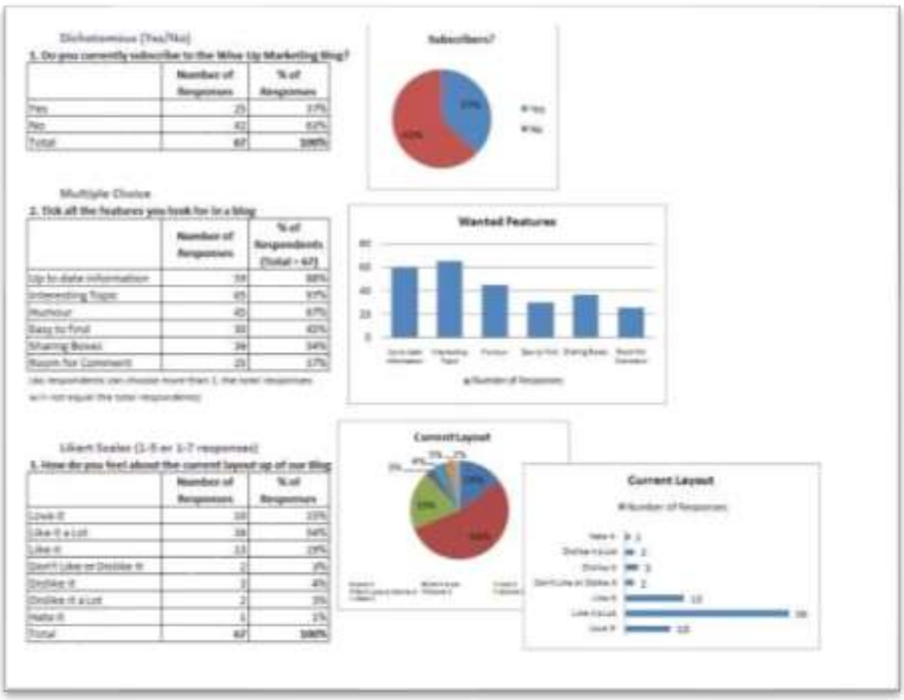
Google Forms information is available on their site https://gsuite.google.com/intl/en_au/products/forms/ where it is also possible to sign up and login.

Google also offer special options available for non-profits. This means, if your peer organisation has membership with Connecting Up, you will likely receive the package at greatly reduced rates. Therefore, when developing your data collection tools, you should factor in your resources. If you have the computer skills and required internet access, you should explore the use of free online survey programs. These will provide ease of access for most respondents, ensuring a straightforward data analysis process.

Once you have your evidence within a spreadsheet, you can use the basic spreadsheet functions to analyse the data. Some surveys may gather evidence on a specific item, which gives a score. However, in most cases, you will want to, simply tally responses by participant over time or by all respondents across questions. For surveys that involve scales and sub-scales, you will be looking to create summary statistics such as the minimum, maximum, and mean (average). You can use spreadsheets to calculate summary statistics (including simple tallies and percentages as shown below, but also other statistics if required).

Q6. Do you feel that Families4Families effectively promotes the independence and full participation of people with ABI in the community?	Yes	Maybe, Not sure	No	Q7. Has being a Families4Families member enabled you to access information that help you to better understand ABI?	Yes	Maybe, Not sure	No	Q8. Does Families4Families offer high quality peer support?	Yes	Maybe, Not sure	No
	23	0	0		21	2	0		21	2	0
	100%	0%	0%		91%	9%	0%		91%	9%	0%

The Better Evaluation has a LINK to a tool which assists in calculating basic statistics within the EXCEL package: https://www.betterevaluation.org/resources/tools/summary_statistics/calc_mean_st_dev.



There are many tutorials and resources available online that provide step-by-step guidance and tools, depending on the type of spreadsheet you are using. Once you have been gathering data over time, you can also compare responses for the same responder over time to see if scores change over their group attendances. If you are using a survey software (like SurveyMonkey or Google Forms), you can also create simple summaries within the web browser. You can also download your data in a spreadsheet format and work with it yourself.

While there are clearly many options for analysing closed ended questions, we will often have an assortment of open-ended questions encompassed within program surveys. In the peer support space, open-ended questions can be very helpful for attaining greater insight compared to their closed-ended counterparts. For example, if we ask a member whether they find the topics discussed in groups helpful with Yes/No closed ended responses, we can follow up asking why. This will give us a richer understanding of the reasons motivating responses. A survey process with open-ended questions gives members and other key stakeholders, the opportunity to provide a range of feedback, ideas and information.

Open-ended responses can help the peer program team to identify new and different ways of thinking about program design decisions. For these same reasons, working with open-ended data can be challenging. One way to organise open-ended responses is to sort them into themes – or common threads across different responses (see: http://www.peerrespite.net/toolkit/). In this process, we put our efforts into finding similarities. If we can achieve this, we are then more able to draw overall conclusions from the varied comments provided. We shall explore a relatively straightforward example. Let us assume you want to know what aspects of the peer support group members find important. As such, you have included the following survey question in your member survey: "What did you like best about your peer support group?". If you received the following ten responses:

1. Getting to know Sam [another member]
2. Meeting new friends
3. NDIS information
4. Having coffee with other members
5. Morning tea is yummy
6. Taking a break from being home
7. Restful
8. Skills I learn
9. Getting out and about with group members
10. The facilitator is great and I learn a lot

You might divide the responses into the following themes:

- Connecting with others (1, 2, 4, 9, 10)
- Food (4, 5)
- Rest/taking a break (6, 7, 9)
- Gaining skills/knowledge (3, 8, 10)

Note that some responses are included in multiple themes. For example, 'Getting out and about with group members' is included in 'Connecting with others' as well as 'taking a break'. You may also need to create an 'Other' theme to which you place any responses that are difficult to group with others.

Example adapted from the http://www.peerrespite.net/toolkit/ site content at: http://www.peerrespite.net/toolkit/#Step3.

Once you have created a list of themes, you can report on the most common ones and count the responses under each to see how many times an issue or concept came up. This gives a general sense of how your group members responded to the question overall. We should also note that although counts can be useful to see how most people feel about the question posed, it might be that only one guest responded in a way, you feel is particularly important. These responses could be highlighted somehow to appropriately represent one person's unique experience (without any identification of course), such as using a quote in a report or promotion.

Q21. **If Families4Families and its Local Support Groups didn't exist, do you think you would need greater funded support (eg. Support workers, ABI training, counselling, NDIS Planning meetings etc)**	**Yes**	**No**	**Maybe**	**Q22.** **Do you have any other comments you would like to make about being a Families4Families member? Are there things you would like to see changed? Are there things you really like and find helpful you would like to tell us about?**
Without the session such as F4F there would be agreater need for funded support. Many individuals would need counselling/support to find out about services.	1	0	0	Many of the groups come together to have a social chat and to have an open chat about any info to assist them. This type of support is helpful to many people to just have a social get together for support.
I now have a sense of self and purpose. I am encouraged to try things and not be disheartened. I would probably still be unable to leave the house.	1	0	0	Without Families4Families I would not be around today - understanding of my injuries and the changes in my personaility and abilities. Keep on going with F4F and as new information comes to light please keep bringing it to the membership. The friendship and understanding, information and encouragement are priceless.

'Without Families4Families I would not be around today - understanding of my injuries and the changes in my personality and abilities. Keep on going with F4F and as new information comes to light please keep bringing it to the membership. The friendship and understanding, information and encouragement are priceless.'

The process of drawing out themes from qualitative data can be undertaken in a more formal way. There are some excellent online resources, which provide quality step-by-step guides to doing this (see for example https://www.sciencedirect.com/science/article/pii/S1877129717300606). This booklet on thematic analysis (TA) illustrates detail around this data analysis strategy that is a commonly used approach when working with qualitative evidence. In this resource, Castleberry and Nolen (2018) define thematic analysis as a method of *'identifying, analysing, and reporting patterns (themes) within data'*, which reduces data complexity enabling it to be flexible enough to dovetail with other data analysis methods. They provide an overview of the stages in qualitative data analysis: compiling, disassembling, reassembling, interpreting, and concluding.

Qualitative data analysis tools include: https://www.sciencedirect.com/science/article/pii/S1877129717300606 and Better Evaluation also has excellent resources including: https://www.betterevaluation.org/evaluation-options/thematiccoding.

It is clear that both quantitative and qualitative data can be analysed, ensuring we are best able to assess performance against our targets. For each specific objective within the four Balanced Scorecard perspectives, we can gather evidence, deciding where we are located, respective to our vision. By analysing our data effectively, we get the best possible indication of our location, positioning us well to adapt our journey if we are going slightly off track. This is obviously hugely beneficial within the peer space.

CAPSULE: PLAN FOR DATA ANALYSIS AHEAD INCLUDING HOW YOU WILL USE YOUR EVIDENCE WHATEVER TYPE OF INFORMATION YOU HAVE COLLECTED. ANALYSED DATA ENABLES YOU TO REPORT TO YOUR PEER ORGANISATION'S KEY STAKEHOLDERS.

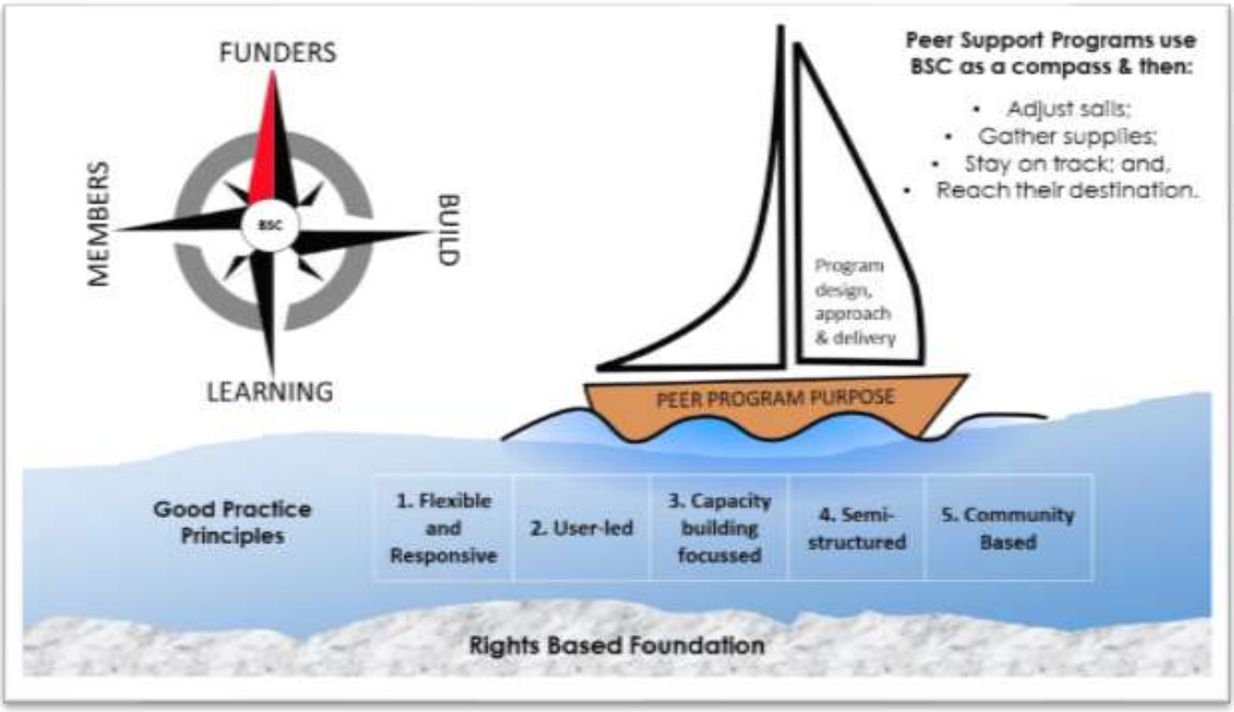
SELF STUDY Q6.4:
Based on your planned evidence gathering (including your answers to question 6.3), will you have qualitative or quantitative data to analyse, or both?

SELF STUDY Q6.5:
What broad steps will you follow to analyse this data once you have collected it?

SELF STUDY Q6.6:
Why is is important to think about what you will use your data for prior to actually collecting it?

COLLATING EVIDENCE FOR DIFFERENT AUDIENCES

We have many different types of data to analyse, we are likely to need to utilise analysis findings for an array of diverse purposes. We have many objectives we are measuring, and these sit under the various Balanced Scorecard perspectives. We expect this data to give feedback, information and updates to your key stakeholders, in the form of, members, peer organisation team members including group facilitators, funders, the NDIA and their ILC team, as well as our broader disability sector and community. In some cases, the same information will be relevant to many different stakeholders. However, the way we collate, analyse and then present that information is likely to need to be different depending upon your audience.



Historically, many peer programs collected and reported data for a simple reason: the funder required it and it formed part of the grant requirements. You are now equipped with a greater understanding about the potential benefits of having this 'compass' to guide your journey (as shown above). This means you may now be undertaking your evidence collection for a range of different reasons. You might be conducting an evaluation or monitoring data to keep the community informed, or to contribute to the evidence about peer programs nationally. You may want to share group member experiences with other groups, and vice versa. You may want to benchmark with other peer programs. You may aspire to comprehend what is working well and what needs improvement. Holistically, you may also want to know, how you are progressing toward your vision. How you report your data will depend on why you are collecting it in the first place.

In our next and final section of the Training Package, we will discuss, in additional detail, the various audiences for which you can collate and report evidence.

CAPSULE: YOUR PEER ORGANISATION WILL HAVE MANY DIFFERENT AUDIENCES FOR THE EVIDENCE YOU COLLECT IN ADDITION TO THE INTERNAL ASSESSMENT OF OBJECTIVES INFORMING YOU ON YOUR LOCATION RELATIVE TO YOUR DESTINATION.

SELF STUDY Q6.7:
Who are going to be the main audiences for your planned evidence gathering reporting?

EXAMPLE: OBJECTIVES, MEASURES AND ANALYSIS OPTIONS

Assuming you have tailored your evidence collection, you will likely have excellent information ready to analyse. Our focus here is on providing you with a choice of options for your reports. In the following table, we have expanded upon the example table we have built to date and focus on analysis methods and options here also. This table highlights how adaptable our evidence can be and its ability to serve multiple purposes. As in the previous module, we have identified the new content focussed on within the current section by showing it as a green shaded column.

Objectives	Measures and Tools Used	Analysis Methods/Options (NEW)
FUNDERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?		
OBJECTIVE 1: We are a highly efficient charity.	New survey developed and sent to donors to gather their view of our efficiency via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents. Feedback collated into a report to the CEO and internal team annually.*
OBJECTIVE 2: We have multiple revenue sources including investment returns.	Evidence team gains access to CEO report to Board including variance analysis. Significant variances (positive or negative) are recorded and analysed.	*Variances from CEO report will be analysed likely via entry of variances into an 'evaluation evidence' database. Main focus in this objective is accuracy of the budgetary planning process and investment returns. Once data is analysed accuracy will be clear. If not accurate, may need to revisit budget and adjust/improve.*
OBJECTIVE 3: We offer a welcoming, safe and supportive environment to our peer members.	Survey developed and sent to existing members and those no longer attending, including questions on how welcomed, safe, supported they feel in the group via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents and against the two groups – current attendees and other. Feedback collated into a report to the CEO and internal team (including relevant facilitators) to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*
OBJECTIVE 4: We focus on building Individual Capacity by providing high quality, relevant information at peer sessions.	Survey developed and sent to existing members and those no longer attending, including various questions on information provided via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents including information quality and relevance using rating scale question(s). Target = 85% of members agree they receive high quality relevant information. Feedback collated into a report to the CEO and internal team (including relevant facilitators) to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*

Objectives	Measures and Tools Used	Analysis Methods/Options (NEW)
OBJECTIVE 5: We regularly invest in peer program development and group leader training.	Survey developed and sent to peer group facilitators including questions on training received and requested/needed via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents including training received and unmet needs. Feedback collated into a report to the CEO and internal team to enable training planning during budgeting process, improvements if needed and ILC reporting/submissions to illustrate ILC Outcome evidence.*
MEMBERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO MEMBERS?		
OBJECTIVE 1: We focus on building Individual Capacity by providing high quality, relevant information at peer sessions.	Survey developed and sent to existing members and those no longer attending, including various questions on information provided via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents including information quality and relevance using rating scale question(s). Target = 85% of members agree they receive high quality relevant information. Feedback collated into a report to the CEO and internal team (including relevant facilitators) to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*
OBJECTIVE 2: We provide high quality, relevant programs that are easily accessible.	Attendance sheets developed for use in each session. Have system in place for centrally recorded data into spreadsheet (centrally located (protected) file needed).	*Data to be entered into an Attendance database with NEW member numbers noted, total attendance per event also along with event details (group, location, time etc). Analyse across groups and topics to ensure each group brings in new members regularly (and continue to attend). Use internally/externally.*
OBJECTIVE 3: We educate, inform and upskill via: peer group sessions, special events, website and newsletters.	Survey developed and sent to existing members and those no longer attending, including questions on value of peer program components using multi choice, Y/N and rating questions.	*Data to be entered into a database with component orders and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents including program components most valued. Feedback collated into a report to the CEO and internal team to enable adjustments, budgetary decisions and ILC reporting/ submissions illustrating ILC Outcome evidence.*
OBJECTIVE 4: We offer informal advocacy and advice resulting in referrals that are accurate and timely.	Survey developed and sent to all members including on whether they have received informal advocacy/referrals and opinions of it using multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and opinion ratings coded including 'do members feel they received what they needed or not, and were there outcomes from the advocacy? Statistics on coded responses are collated including %age of members getting and/or gaining from this. Feedback collated into a report to the CEO and internal team to enable adjustments, budgetary decisions and ILC reporting/ submissions illustrating ILC Outcome evidence.*
OBJECTIVE 5: We offer members a welcoming, safe and supportive environment.	Survey developed and sent to existing members and those no longer attending, including questions on how welcomed, safe, supported they feel in the group via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents and against the two groups – current attendees and other. Feedback collated into a report to the CEO and internal team (including relevant facilitators) to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*
OBJECTIVE 6: New member join our groups and those that depart provide positive feedback on their peer experience.	Survey developed and sent to group facilitators including questions on the group membership and changes in membership via multi choice, Y/N and rating questions.	*Surveys of peer group facilitators data to be entered into a database with Y/N and ratings coded. Statistics on coded responses were collated. Feedback collated into a report to the CEO and internal team to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*

Objectives	Measures and Tools Used	Analysis Methods/Options (NEW)
BUILD: TO ACHIEVE OUR VISION, WHAT MUST WE BUILD INTERNALLY?		
OBJECTIVE 1: IT infrastructure meets our needs as an innovative, growing charity.	Survey developed and sent to team members including questions on the IT system available and their use of it via multi choice, Y/N and rating questions.	*Surveys of team members (including peer facilitators) including questions on IT system, IT resources they are using, if it assists them in their role. If not, what do you they need? Do they need training?. Data to be entered into a database with Y/N and ratings coded. Feedback collated into a report to the CEO and internal team to enable IT improvements.*
OBJECTIVE 2: We effectively manage new members professionally and consistently.	Survey developed and sent to new members including various questions on their joining process, new member package receipt and if needs are being met by peer group via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages. Feedback collated into a report to the CEO and internal team to enable adjustments and improvements and ILC reporting/submissions to illustrate ILC Outcome evidence.*
OBJECTIVE 3: Our office and session facilities are secure, safe and clean spaces.	Survey developed and sent to team members including facilitators, with questions on their office and other peer program spaces via multi choice, Y/N and rating questions.	*Surveys of team members (including peer facilitators) including data collected on opinions about program facilities. Data to be entered into a database with Y/N and ratings coded. Feedback collated into a report to the CEO and internal team to enable IT improvements.*
OBJECTIVE 4: Our peer program has clear policies and procedures that support, and protect, both our members and our team.	Survey developed and sent to members including questions on 1-2 policy applications they should be impacted by and, if it is not working questions about what may be missing or not being followed. Use multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages to gain evidence on the consistent application of policies and procedures. Feedback collated into a report to the Board, internal team to enable improvements and possibly ILC reporting to illustrate adherence to policies such as accessibility, equity and access to complaints and feedback mechanisms.*
OBECTIVE 5: We continually improve and develop our programs, expertise and evidence, training resources and other materials or program resources.	Focus group attended by a range of peer group members that have attended various groups for some time is held. Discussion is recorded and transcribed. Training focus group facilitator directs discussion around evolving program, changes they have experienced, if these are good and ideas for beneficial change.	*Data is entered into a program (QDA Miner Lite) enabling all the transcribed discussions to be put through a process of thematic analysis. The output from the program provides the key themes in the content, enabling conclusions of improvements and positive change to be confirmed or not. Feedback and the key themes, along with key quotes and comments, are then collated into a report to the Board, internal team and possibly ILC reporting to illustrate a commitment to continual improvement and evidence of including peer members in feedback and peer program development over time.*
LEARN: TO ACHIEVE OUR VISION, HOW and IN THE FUTURE, WHAT MUST WE LEARN?		
OBJECTIVE 1: National/overseas conference attendances and presentations are sought, secured and funded.	Survey developed and sent to team members with questions on submissions, attendances and presentations via multi choice, Y/N and open-ended questions.	*Surveys of team members including data collected on conference and other attendances, submissions and presentations on the peer program and related content. Data to be entered into a database with Y/N coded and open-ended comments included. Feedback collated into a report to the CEO and ILC reporting as this illustrates ongoing program development and a research/evaluation focus.*
OBJECTIVE 2: We have a	Survey developed and sent to team members, volunteers and	*Surveys of team members (all, including volunteers and group leaders) including data collected on their expertise, satisfaction in their role(s), flexibility (ability to operate in other roles) and*

Objectives	Measures and Tools Used	Analysis Methods/Options (NEW)
trained, motivated and empowered team that are flexible across multiple roles.	facilitators with questions on their expertise, satisfaction, flexibility and motivation via multi choice, Y/N, ratings and open-ended questions.	*motivation. Data to be entered into a database with Y/N, multi choice and ratings all coded and open-ended comments included. Feedback collated into a report to the CEO and ILC reporting as this illustrates team member attributes essential for ongoing program success. Could also be used for performance review purposes.*
OBJECTIVE 3: Our organisation develops leading edge information topics.	Survey developed and sent to existing members and those no longer attending, including various questions on information provided via multi choice, Y/N and rating questions.	*Data to be entered into a database with Y/N and ratings coded. Basic statistics on coded responses are collated including %age of each answer and ratings averages across respondents including information quality and relevance using rating scale question(s). Feedback collated into a report to the CEO and Internal Team (including relevant facilitators) to enable input to topic selections and ILC reporting/submissions to illustrate ILC Outcome evidence.*
OBJECTIVE 4: We regularly explore organisational collaborations and grow links over time.	Survey developed and sent to team members, volunteers and facilitators with questions on collaborations or other links they develop via multi choice, Y/N, ratings and open-ended questions.	*Surveys of team members (all, including volunteers and group leaders) including data collected on the ways in which they link in with, or collaborate with, other organisations. Data to be entered into a database with Y/N, multi choice and ratings all coded and open-ended comments included. Feedback collated into a report to the CEO and ILC reporting to illustrate collaboration and evidence of this approach being used.*

We had developed, for each of the four BSC perspectives, tables that listed measures for each objective. Some of these indicators were from secondary sources and others, primary sources. A portion were collected opinions from key people via surveys or interviews. Others included figures, namely, group attendance or number of new members. For at least some of your objectives, you will be asking for feedback from a stakeholder such as a peer group member, one of your staff, potentially a donor. In these cases, we need to develop, or utilise a pre-existing, tool like a survey to collect this tailored evidence.

However, collecting the evidence is by no means the end of the process. We then need to follow our data analysis basics for presenting the evidence collected in the most suitable and powerful way possible. This module has focussed on the analysis of data and the various ways we can best manage the different types of data gathered within our peer organisation. The table of examples illustrates the kind of brief notes and planning required for our data analysis during our data collection planning. Consideration of how we will undertake this process should commence very early in evaluation planning, rather than when we have already completed data collection.

CAPSULE: DATA CAN BE ANALYSED IN VARIOUS WAYS DEPENDING UPON ITS PURPOSE, ITS AUDIENCE AND ITS DATA TYPE. YOUR OWN RESOURCES WILL ALSO DETERMINE THE AVAILABLE OPTIONS. UTILISING YOUR DATA FOR VARIOUS PURPOSES ENSURES IT BRINGS YOUR PEER PROGRAM MAXIMUM POSSIBLE BENEFITS.

SELF STUDY:
You previously responded to questions 5.8, 5.9, 5.10 and 5.11 providing information on each objective and measure (identified in questions 4.6 & 4.7 (Funder), 4.9, 4.10 & 4.11 (Member), 4.12 & 4.14 (Build) and 4.15 & 4.16 (Learning) and used a formatted table to list Indicators, Evidence Collection Strategy and Tools & Frequency. Now, please complete the following table with your planned data analysis details based on the content covered in this section of the Training Package.

SELF STUDY Q6.8:
Complete the Funder objectives, measured and tools used (as per 5.8) and then add in data analysis methods and options being considered.

SELF STUDY Q6.9:
Complete the Member objectives, measured and tools used (as per 5.8) and then add in data analysis methods and options being considered.

SELF STUDY Q6.10:
Complete the Build objectives, measured and tools used (as per 5.8) and then add in data analysis methods and options being considered.

SELF STUDY Q6.11:
Complete the Learning objectives, measured and tools used (as per 5.8) and then add in data analysis methods and options being considered.

Objectives	Measures and Tools Used	Analysis Methods/Options
FUNDERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO OUR FUNDERS?		
OBJECTIVE 1:		
OBJECTIVE 2:		
MEMBERS: TO ACHIEVE OUR VISION, HOW SHOULD WE APPEAR TO MEMBERS?		
OBJECTIVE 1:		
OBJECTIVE 2:		
OBJECTIVE 3:		
OBJECTIVE 4:		
BUILD: TO ACHIEVE OUR VISION, WHAT MUST WE BUILD INTERNALLY?		
OBJECTIVE 1:		
OBJECTIVE 2:		
LEARN: TO ACHIEVE OUR VISION, HOW and IN THE FUTURE, WHAT MUST WE LEARN?		
OBJECTIVE 1:		
OBJECTIVE 2:		

In Summary

The Balanced Scorecard (BSC) is a way of structuring the key objectives for your own peer organisation. Assessing each objective involves us selecting key measures for which we then gather information, enabling its analysis resulting in our conclusions. These will inform us about where we are, in comparison with where we want to be. They can also assist our thinking around how we structure our journey to get there. Our analysed evidence gives us insight and feedback essential to our success. We have seen that by using the BSC, peer organisations can gather tailored evidence, as a kind of 'compass' to assist each program to navigate their way based on their purpose, program design and concept of success.

Data analysis is a key component of using collected evidence to inform, learn and improve our peer programs. We previously developed an understanding of the tools that peer programs can use to gather evidence. We have now discussed ways of managing, collating and utilising this evidence. Data analysis can be a simple process, usually with a focus on exploring ways of interpreting the evidence as cleanly and completely as possible. Upon determining an appropriate coding method, the most common technique for survey data involves entering responses into a database or employing an online survey tool and then exporting the completed database. For qualitative evidence, you will want to explore emerging themes and discuss them in your reporting. These, combined with quotes and unedited responses, can serve as powerful illustrations of performance.

Next in the training package we present our final new content and conclude our journey into learning and improving disability peer programs through evidence collection. We will discuss utilisation of analysed evidence and the various ways we can use this, both internally and externally. Our findings should be significant and relevant to a range of different audiences. We will also explore how to approach the reporting of these conclusions. Our goal is to display simple ways of producing strong evidence of your success which your peer organisation can embrace, both internally and externally.

Resources:

- Amaze (2018), Literature Review: Best Practice Peer Support. See: http://www.amaze.org.au/uploads/2018/05/Final-Amaze-peer-support-literature-review-April-2018.pdf .
- Save the Children (2017), MEAL project – https://resourcecentre.savethechildren.net/library/savechildrens-monitoring-evaluation-accountability-and-learning-meal-introductory-course. Table from 'save the children' booklet - https://www.scribd.com/document/282849699/6-methods-of-data-collection-pdf - 6 methods of data collection.pdf - Download as PDF File (.pdf), Text File (.txt) or read ... common methods and data analysis techniques for both quantitative and qualitative .... quantitative surveys can include open-ended questions.
- Bogdan, R. C. and Biklen, S. K. (2006). Qualitative research in education: An introduction to theory and methods. Allyn and Bacon. ISBN 978-0-205-51225-6. – see https://en.wikipedia.org/wiki/Triangulation_(social_science)
- Families4Families Report for DSO Project, Survey, data analysis and tables provided.
- Other reports also – Dropbox links possibly to be added in here.
- If you require additional data analysis information, there are significant resources available online. See for example: https://www.betterevaluation.org/en/rainbow_framework/describe/analyse_data which provides an excellent overview of data analysis methods for both quantitative and qualitative data within evaluation.
- For further information on Likert (or rating) scales see http://www.peerrespite.net/toolkit/#Step3.
- The Better Evaluation has a LINK to a tool which assists in calculating basic statistics within the EXCEL package: https://www.betterevaluation.org/resources/tools/summary_statistics/calc_mean_st_dev.
- See for example: https://www.wordstream.com/blog/ws/2014/11/10/bestonline-survey-tools for an excellent and quick overview of the available options.

- Google Forms information is available on their site https://gsuite.google.com/intl/en_au/products/forms/ where it is also possible to sign up and login.
- Example adapted from the http://www.peerrespite.net/toolkit/ site content at: http://www.peerrespite.net/toolkit/#Step3.
- Qualitative data analysis tools include: https://www.sciencedirect.com/science/article/pii/S1877129717300606 and Better Evaluation also has excellent resources including: https://www.betterevaluation.org/evaluation-options/thematiccoding.

CAPACITY BUILDING FOR PEER SUPPORT

SEVEN: USING EVIDENCE INTERNALLY & EXTERNALLY

SECTIONS:

- Using Evidence Introduction
- Punching Above your Weight & ILC
- Internal Learning Loops
- Sharing Evidence with Other Stakeholders
- In Summary
- Resources
- Self Study Questions

USING EVIDENCE INTRODUCTION

Our evidence-gathering course began with thinking through where you would like your peer program to be. This has entailed a sequence of progressive actions and decisions made, which are tailored by your own organisation. Steered by the four perspectives of the Balanced Scorecard (BSC), we coordinated our choice of objectives. We then contemplated, not only what we would assess (Section 4) but also the way we would do so (Section 5).

Following this, we discussed ways of managing, collating and utilising the evidence collected (Section 6). Data analysis occupies a major role in the process of drawing upon compiled evidence to enlighten, gain knowledge and progress our peer programs. Data analysis represents an uncomplicated course of action, which regularly has an emphasis on searching for methods of interpreting evidence, as easily and fully as possible. We now conclude our journey into learning about, and improving, our programs.

This final section is particularly important for peer organisations. We will discuss utilisation of analysed evidence and the various ways in which we can use this both within and beyond our programs. The findings we produce should be noteworthy and pertinent for an assortment of onlookers. How we approach the reporting of these conclusions will be explored. Our hope is to offer you an array of strategies, towards generating meaningful evidence for your diverse variety of readers.

Your peer program will have lots of different types of analysed data to interpret and share from your evidence gathering project. We will also likely be needing to utilise the findings for a range of different purposes. We have many objectives under the Balanced Scorecard perspectives, which are worth assessing, for calculating our position. We also tend to seek usage of our findings for communicating feedback, information and news to major stakeholders. They are members, group facilitators, organization staff, funders, the NDIA and their ILC team, plus the disability sector, as a whole, and the broader community. At times, identical information will be valid for many interested parties. Nonetheless, how we proceed with pooling and examining, before displaying that information is liable to be diverse, governed by whom we are addressing.

Historically, a large share of peer programs brought data together and formally presented it for a basic motivation: the funder called for it and/or it was a feature of grant conditions. Nevertheless, now armed with a deeper awareness of potential benefits, drawn to the promise of a ‘compass’, we envisage you carrying out your evidence collection for a variety of diverse intentions. Your motivation may be keeping the community up-to-date and adding to evidence, regarding peer programs, on a national scale. You could wish to impart member experiences with other groups, and vice versa, or engage with other programs as a point of reference for your own. You may aspire to obtain insight into what is working well and what warrants further investment. Another dimension may surround your desire to know how well you are progressing toward your vision. Your original purpose for undertaking data gathering will influence the way you report it.

CAPSULE: GATHERING EVIDENCE CAN BE MOTIVATED BY A VARIETY OF NEEDS AND YOUR PURPOSE WILL INFLUENCE DECISIONS SURROUNDING ITS REPORTING AND PRESENTATION.

SELF STUDY Q7.1:
What are three reasons that you may decide to undertake an evidence collection journey?
In each case, who would be the intended audience for your evidence, findings and related reports?

PUNCHING ABOVE YOUR WEIGHT & ILC

If you are running a peer support program for the disability sector in Australia then you are apt to either be receiving, or aspiring to accept, funding from the NDIA by way of its ILC grants. The NDIA have very clear ILC outcomes they are seeking from any programs they will fund. ILC outcomes can be viewed online (see: https://ilctoolkit.ndis.gov.au/outcomes/ilc-outcomes) and are described in further depth in the 'ILC Outcomes Discussion Starter'. When orchestrating an application for ILC funding, your organisation has to pinpoint how the endeavour adds to one or more of the five ILC outcomes and how you will assemble evidence on this effort. Consequently, grant applications ought to contain outcome assessment information. This will function as one dynamic of our 'Funders' perspective within the BSC. In a majority of circumstances, peer programs will come via 'Individual Capacity Building' for which the outcome objective is as follows:

Individual Capacity – activity outcomes

For "Individual Capacity" the key outcome statement is:

People with disability have the skills and confidence to participate and contribute to the community and protect their rights.

To measure progress against this outcome we will be looking for evidence of;

- Increased skills and capacity,
- Increased motivation, confidence & empowerment to act,
- Increased self-advocacy, independence and relationship building,
- Increased participation in community life, and
- Increased contribution to community life.

OPTIONAL LINK: The ILC Toolkit (https://ilctoolkit.ndis.gov.au/) provides an introduction to ILC Outcomes including discussion surrounding activities, outcomes and the importance of measuring outcomes.

ILC funded peer programs are be required to track, assess and formally document both process and activity outcomes. Gathering evidence on the process of delivering an ILC activity incites a give and take of feedback between peer organisations and their members. Gathering evidence on process outcomes enables the peer program to capture greater insight into the effectiveness of the program for people with disability, in real-time. You gather evidence to detect any enablers for this success and any outside barriers that may be constraining the program. Monitoring and reporting of activity outcomes will be one facet of the reporting requirements for attaining ILC funding from the NDIA. Activity evidence regards: To what extent are things being done? How well is this happening? Moreover, which shifts took place in participants' lives? This is the difference that your peer program has made for individual members, and could be evidenced by storytelling, case studies or pre-and-post-surveys. This is well explained on the ILC Toolkit site (see http://ilctoolkit.ndis.gov.au/what-are-outcomes):

ILC, as potential funders, want peer organisations to have the capacity to measure, amass evidence, and report on outcomes. Outcome evidence shows the ILC that your peer team have embedded an outcomes orientation for their peer program. Unless your peer organisation is able to establish a system, which reflects activity and process outcomes for the funder 'ILC', it is improbable you will be able to work well in this space. This is one of the main aims for the development of this training resource. The ILC Toolkit explains the importance of an outcomes focus on their site (http://ilctoolkit.ndis.gov.au/what-are-outcomes):

> ***'Why is it important to measure outcomes?***
> *Shifting to an outcome-focused way of measuring your activities is important. It will help ensure you are delivering tangible results for people with disability. It will also:*
>
> 1. *Prove your impact in a clear and compelling way*
> 2. *Improve the impact of your services over time*
> 3. *Increase your funding sustainability (e.g. bulk funding arrangements, pay by results contracts, social benefit/impact bonds)*
> 4. *Demonstrate that your organisation's approach is unique, integrated and good value for money'*

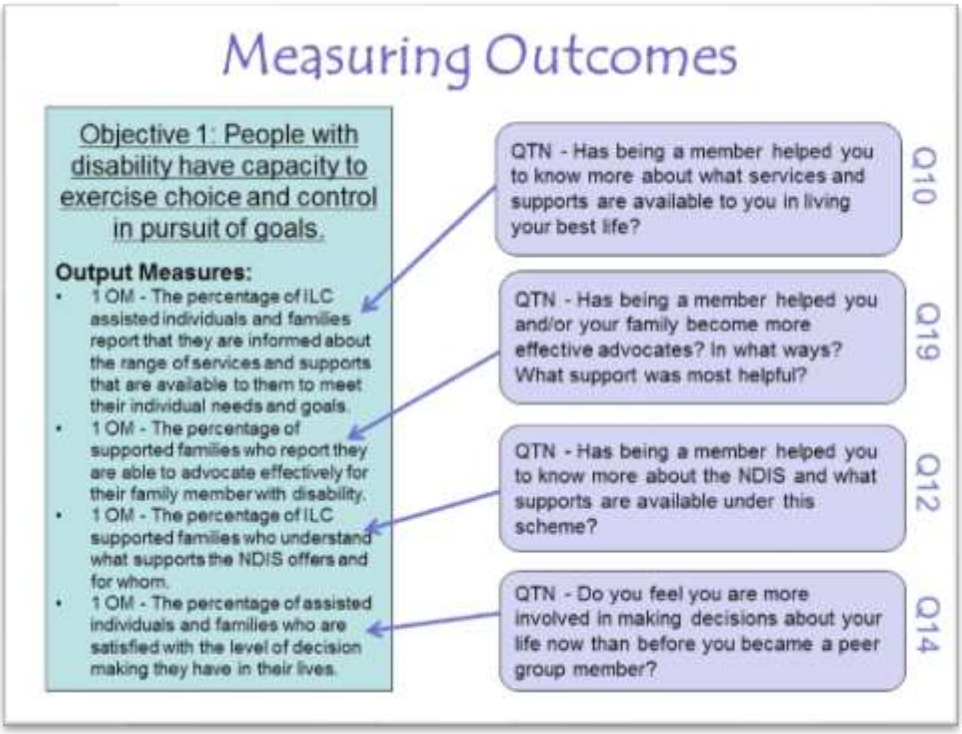
SELF STUDY Q7.2:
Why do you need to focus on outcomes when considering evidence collection for the ILC?
What is the most important thing you want the ILC to know about your peer program? Which of your BSC objectives does this relate to? (Perhaps add a '*' on this in your BSC table to ensure you focus on this).

It is very clear that concentrating on outcomes is critical for achieving future support from the ILC. It is also apparent that the NDIS is re-evaluating and adjusting this investment area. ILC details are presently in the restructuring stage. As such, this resource is taking a very broad view to ensure our foundations remain relevant, and our evidence useful, regardless of the ILC specifics which correlate with ILC assessment and reporting responsibilities. Changing your unique 'compass' whenever the ILC changes its tool or reporting requirements would be less than ideal. It would call for additional staff investments around learning, training, change management and alike. This would also not allow you to see your journey thus far very clearly.

The NDIA have also recently (end of 2018) announced a new investment strategy for ILC. They state that they '*have learned a lot about what works and what doesn't during the early implementation of the ILC program and have been listening to feedback from the community and key stakeholders*' (see https://ilctoolkit.ndis.gov.au/ilc-funding). Consequently, they are changing the approach to the way they invest in building individual and community capacity and have released '*The Strengthening ILC: A national strategy towards 2022*' to explain the new approach.

A download of this PDF is available from: https://ilctoolkit.ndis.gov.au/ilc-funding (ILC are planning to release an Easy English version in early 2019).

Consequently, while we have alluded to inclusion of ILC outcomes being a principal dimension of objectives within the 'Funders' perspective, it is not the only outcomes to consider. We aspire to compile evidence about essential outcomes, centring on our robust foundation – our Human Rights beliefs. As was reflected upon more deeply in Section 5, we anticipate you will apply survey data for analysing a portion of ILC Outcomes. We presented you with an example survey and show you now its development from the ILC Framework in place, at that time:



At the commencement of the DSO project, the ILC Team set a range of specific performance indicators. This example survey was utilised within the Families4Families peer support network. A component of reporting required feedback on these indicators. It was a condition; they needed to be addressed through written reports. The full table of evidence reported, alongside an overview of the background survey development, is available for download on this package website. Nevertheless, a report constructed from evidence collated on a sole performance indicator ('*Increased understanding of the NDIS and the principles which underpin it*'), is presented in the following table.

Performance Indicators	Brief Description/Notes
Increased understanding of the NDIS and the principles which underpin it	Local Support Group members need an increased understanding of the NDIS and its underlying principles to fully participate and benefit from this new disability system. We have gained feedback on this indicator in a range of ways: • Level of provision of NDIS information at groups and our volunteer training retreat; • Individual surveys relating to ILC objectives; • National evaluation data; and, • Group surveys data relating to NDIS knowledge 1. <u>NDIS Information Provided at LSGs 2016</u>:

Performance Indicators	Brief Description/Notes

A new topic has been delivered at various groups this year. This directed attention towards the NDIS and its underlying principles including choice and control, the insurance model and its focus on goals. To further our understanding, the topic has been provided throughout the year as we move toward full rollout for adults from July 2017, further ensuring we increase understanding of the NDIS and the principles underlying it:

The NDIS & You
(What it is, What it means for You)

The NDIS is the new National Disability Insurance Scheme being trialed across Australia and to be rolled out fully by 2018/19. This is a new approach to how people living with disability are provided with funding to assist them in living their best life possible. This topic will provide you with an overview of the NDIS and what it means to you and your family in the future. The importance of the concepts of choice and control along with key issues such as eligibility, funding available, reasonable and necessary, and its key focus on goals and aspirations are all discussed in detail with examples. Links for further information are also provided in this important topic.

DISABLITY INFORMATION GROUP	11th February
SOUTHERN	1st March
NORTHERN	22nd March
MT GAMBIER	29th April
METRO	26th May
MURRAY	28th July
ENFIELD	17th August
EYRE	16th September

In addition, the focus on goals and holding valued roles within the community has been delivered via three of our new LSGs for 2016 – the Planning Cohorts. These three cohorts each take 5-8 people with disability and, supported by their own support network of family and friends (who are all encouraged to attend), work through a life planning process, a central theme of which, is, helping the person with disability to articulate their life goals and aspirations. There is a focus on the use of informal supports, and we take all participants through the required thinking this underpins the NDIS. We believe these groups; most fully prepare attendees for the NDIS.

2. NDIS Information Provided at Retreat 2016:

At the retreat held in late May/early June, participants were offered a range of NDIS information. Through this, our group leaders can become ambassadors for the new disability system, providing answers to member requests and confidence about the process ahead. Our evaluation then assessed whether this resource gave improved NDIS knowledge, and it is clear from responses it did:

Q.4. Before attending, my NDIS knowledge was	4.58	Attendees rated this on a scale of 1 to 10 (from 1 being 'no knowledge' to 10 'I know everything I want to about it'). Before the retreat the rating was 4.58, then after it was 7.74 representing a large 69% increase in NDIS knowledge of volunteers from the retreat. This is important as our volunteers will now spread this knowledge
Q.5. After attending, my NDIS knowledge was	7.74	

Some of the quotes received in response to a question on the most helpful information from the retreat included:

- *All the latest on the NDIS, NDIA and ILC.*
- *Information regarding the NDIS. This is information I need to hear a number of times to begin to understand it. I do have a clearer idea of what is happening now and of what is yet to be determined. ILC framework introduction.*
- *NDIS, ILC framework, financials and where do we go from here.*
- *Upgrades on the changes on NDIS, NDIA.*
- *Finding out where we are at re NDIS/NDIA, although there are still "unknowns" externally that could enable forward planning. Making sure we are all on the same page.*

3. NDIS Individual Survey Data:

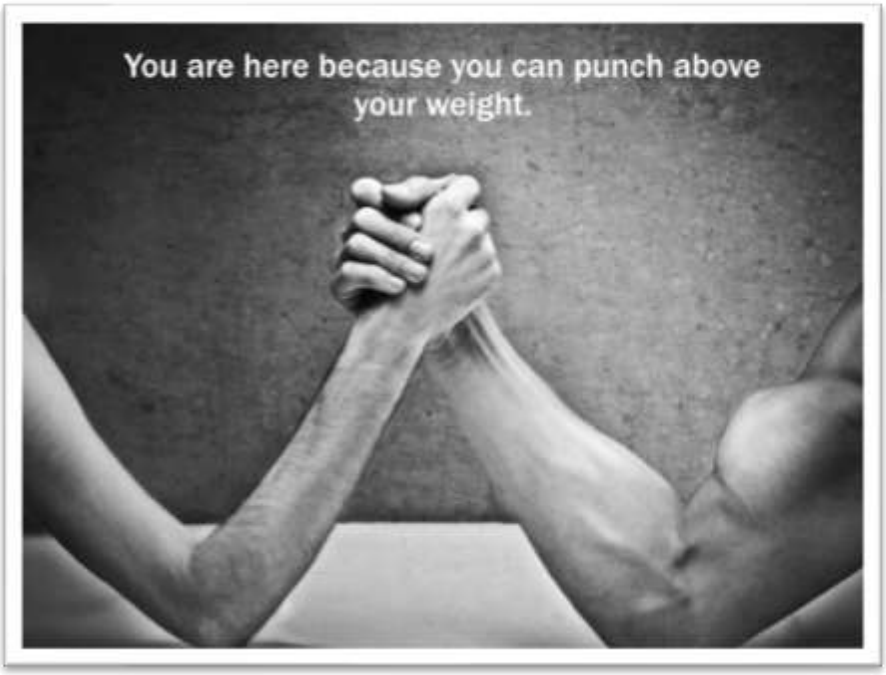
Performance Indicators	Brief Description/Notes
	Our individual surveys included questions relating to the NDIS – specifically questions 12 and 6. The responses to these questions are provided here and illustrate we are building NDIS knowledge in our members: ◦ **Question 12:** *Has being a member helped you to know more about the NDIS and what supports are available under this scheme?* This question was rated 1, 0, -1 and entered into our evaluation data spreadsheet. From the 19 surveys recorded, 12 members agreed LSGs have assisted members to know more about what is available, five respondents were unsure, and one did not think we had assisted. Out of the six respondents unsure or not agreeing, five had not had the NDIS topic delivered at their LSG at the time of the survey being undertaken. We feel these results are impressive particularly given that, in reality, a majority of members are yet to be able to access the NDIS for another 12 months. Due to the timing, our team made the decision to keep our NDIS sessions broad and focussed on concepts such as choice and control rather than specifics, as this will be delivered in 2017 sessions (if we are able to continue operating as a DSO). o ***Question 6:*** *Do you feel that Families4Families effectively promotes the independence and full participation of people with ABI and their families?* This question was rated 1, 0, -1 and entered into our spreadsheet and 100% of members agreed that our LSGs have promoted their full community participation and independence. 4. National Evaluation Interview Data: The national lead agency undertook independent evaluations of DSO members from all the DSOs throughout May 2016. The summary report from this is provided in Appendix C. The specific comments most relevant in providing outcome data on NDIS knowledge and principles are as follows: ***Question (topic 2):*** *Would you like your peer group to keep going to help you understand more about the NDIS?* **Key themes:** 2a) Definitely want peer groups to continue with rollout of NDIS. Initial discussions on NDIS have commenced, focusing on what is a good life and the importance of planning o *Started talking about NDIS – doing a group of planning session to do our plans for NDIS. Coming to terms with NDIS.* o *'Planning a good life' sessions. Going through how things affect us and what we want, to see what goals could be, and what our fears are. Doing posters and planning book. Each week a different topic/ poster.* o *F4F will give us a template for planning. Giving us 3-4 pages at a time – gradually – not overwhelming.* o *Will make a difference with NDIS – enables family to understand what's going us and each to get to understand what the other wants.* o *Understanding NDIS process better now. I can target things I know I need with NDIS e.g. physio, cleaner, shopping assistance.* o *Preparing for the NDIS now. F4F briefed us on what it is and maybe what it can do for you. Helping me put together a plan in readiness for NDIS.* o *Didn't realize how important a plan was. I don't know what they can do for me yet. I don't want others making a plan for my life or decisions for me that are not right for me.* o *The planning provided for F4F is crucial. I didn't know it was that important to have a plan. Without the plan I wouldn't know what to ask or tell the NDIS.* o *Will need more NDIS sessions. As things change the NDIS is impacting on people differently.* o *Not really sure what NDIS can do for me yet. Need the supports through the NDIS to maintain a good life. We need to aim big.* o *Hearing about the NDIS from others perspective is really good.* 5. Group Survey Data: Many of our Local Support Groups were surveyed during June 2016 as an update to the group surveys undertaken in the second half of 2015. Question 5, the last one, asked 'if Families4Families and its groups didn't exist, would you have any unmet needs? If so, how else could they be met?'. In LSG019, one of our Planning Cohorts evaluated on 14 June, a response specifically addresses this indicator: o *No knowledge about information.;* o *Only through F4F meetings did members learn about information about NDIA.* o *Only through F4F did member learn where to seek leg brace to support him.* In summary, Families4Families has provided clear evidence of its members and LSG participants having an increased understanding of the NDIS, and the principles which underpin it.

As you can see in this single item table, evidence on that specific indicator was collected and presented in several different ways. The focus of this report was depicting not only the outcomes that group members gained but also illustrating the variety of ways the peer program ensured this coverage as well as the variety of ways evidence was collected. Naturally, having different data sources always improves the strength of evidence you are presenting. The technical term for ensuring you have evidence collected from multiple sources, using multiple methods, is triangulation:

> *'Triangulation is a powerful technique that facilitates validation of data through cross verification from two or more sources. In particular, it refers to the application and combination of several research methods in the study of the same phenomenon.' (Bogdan and Biklen, 2006)*

In summary, while the ILC team of the NDIA are likely our primary funders, we must ensure we take a holistic approach to our reporting to them. For our ILC reporting requirements, we will more than likely be able to utilise the same collected and collated information required to assess our Balanced Scorecard objectives. We will also be able to provide evidence of our past success, learnings, knowledge and expertise so crucial for ILC grant funding submission success. This prepares us to explain our evaluation model and plan, another key requirement for ILC grant funding submission success.

One of the most exciting benefits of excellent peer program information gathering plans is that your evidence can successfully pitch you against the 'big players' in the marketplace. Evidence enables you to illustrate your experience and hard-earned expertise. This guarantees your place as a market leader, despite being a relatively small user-led organisation.



CAPSULE: AS A USER-LED PEER ORGANISATION, YOUR TAILORED EVALUATION PLAN WILL BE ESSENTIAL FOR ILC GRANT SUCCESS AND YOUR EVIDENCE WILL ENABLE YOU TO BID AGAINST LARGER PLAYERS IN THE MARKETPLACE – 'PUNCHING ABOVE YOUR WEIGHT'.

SELF STUDY Q7.3:
Write 2-3 sentences on why you believe your peer program 'punches above its weight'. For example, is this because of your people, knowledge & experience, your history, and/or perhaps the links you have with other community groups?
Briefly write one way you could prove this to the ILC decision makers using collected evidence.

INTERNAL LEARNING LOOP

To secure long-lasting successful delivery of peer programs, continuous improvement and knowledge must be a focus. In this regard the ILC toolkit again provides us with insight into the importance of having an internal ‘learning loop’. A learning loop is a defining procedure about how the work you do now informs what you do next. It reflects the fact that learning is an ongoing, repeated process. When you know what you are doing now, undertaking improvement in your peer programs becomes possible. In the ILC Toolkit (http://ilctoolkit.ndis.gov.au/what-are-outcomes) outcome evidence is presented as information which you can embrace ‘to prove and improve on your work’. Collected information only provides value if you do something with it. The ILC documentation suggests that you should use it to do two main things:

- Prove your activity provides value: *‘Communicate your findings to funders, beneficiaries, staff and other key stakeholders. Outcomes can’t be achieved overnight, yet you can show that progress is being made.’*
- Improve on your activities: use the information to assess if you are on track to achieving your outcomes. In other words, where is it you are currently located? How close are you to your desired destination? ILC suggests that you ask yourself:
    - *‘Is the program delivering what it set out to do?*
    - *If not, why not? What needs to change?’*

> **Tip**
>
> Your story, or ‘theory’, of change describes what you want to see happen for people with disability as a result of your work. By considering any potential new activities, or changes to existing ones, from the perspective of how they can contribute to the outcomes you have identified, you can make strategic decisions about the future direction of your organisation and where you will focus your resources

Feedback represents an important way for members to let you know when a problem/s exist. Cultivating a good culture of feedback within your peer organisations is something that has been advised within pre-NDIS state government delivered disability models of support. For example, Disability SA urges providers to ensure they have a feedback and incident review process in place. This process should support people's rights to safely bring up their grievances without fear of repercussions and be easily accessible. They also assert that feedback provides an opportunity to make services better and safer for everyone (see https://www.sa.gov.au/topics/care-and-support/disability/service-providers/feedback). A good feedback culture is where people are encouraged to provide feedback, and they feel comfortable providing either positive or negative feedback about the services they receive.

Growing the capacity of individual participants is a likely key objective for your program. As such, the information you gather from them is going to best employed to inform program design and development. Are you asking your attendees for suggestions of new group discussion topics or information of interest? Do you regularly assess their feedback on locations? This will expose whether levels of accessibility or suitability have changed over time. To ensure a particular participants does not dominate, is the ‘feel’ in the group right? Does feedback suggest the facilitator needs support to learn strategies? It is crucial to have a range of such details gathered if they are some of the drivers of your peer program's success. Feedback also guides our data collection and analysis decisions, as we will want this kind of information available on a group-by-group basis and/or a topic-by-topic basis. This transforms evidence into a formidable tool for program learning and improvement.

In addition to accumulating information on an assortment of essential program features, it is also important to use the evidence you have collected from individuals whenever it is available. People who have been asked for their opinion want to know it was taken seriously. Some peer group members may be unfamiliar with being asked to provide feedback and being able to share their views within an official assessment process. By being involved, they are trusting their organisation to appreciate their input and treat it with respect for the worthy evidence it is. Everyone wants to feel valued, and I know I would feel more valued if I saw my ideas, efforts and feedback being thought about, reported on, and included in some way. This is also one of the 'Principles of Good Practice' identified in the Social Policy Research Centre (SPRC, 2018) practice review: being 'flexible' and 'responsive'. This is discussed back in Section 3, where it is noted that '*the ability of peer organisations to be responsive to participant needs and preferences is a key factor for their success'.* Davy et al (2018, p.11) notes that having such feedback evidence will enable peer programs '*to respond locally and at a grassroots level to what works'* for specific members and groups.

Another of the 'Principles of Good Practice' for peer programs identified by the SPRC (2018) review is being a user-led organisation. Also discussed in Module 3, user-led organisations are described as being based on the lived experience of people living with disability and their families. Given this approach, it is uncommon for peer led organisations to have access to experts in areas such as 'evaluation' or performance assessment. It is fundamental for us to take simple and straightforward methods of reporting into account for people living with disability, alongside their family and friends, who may undertake the strategic management of the organisation. Guaranteeing that staff share evidence with their organisation's Board, or Management Committee, is vital. Once more, applying the existing example of Families4Families, the following table was employed in that case, for reporting of BSC objectives performance to the Management Committee (their 'Board') ahead of each bi-monthly meeting.

Families4Families Inc

CEO Report Jan17

Summary of Milestones

During the hectic time since returning as CEO, various actions have been undertaken including:

- Calendar has been finalised, all rooms booked, presenters confirmed and Calendar is being sent for print on 4 Jan ready to distribution that week;
- Reinstatement of Roles and Responsibilities descriptions for 2 key operational team members (Jen as CEO and Jules as Membership Manager);
- Completed Minutes for MC Meeting, organised/delivered Social Chat meeting 27 December;
- Submitted NDIA CICD Application, secured funding with this and signed all agreements;
- Successfully planned for 4 new LSGs in rural locations for 2017—only 1 still to plan;
- Completed 2 eNewsletters including training new volunteer, Daniela, so she can take this on from February eNewsletter onwards;
- Liaised with Sonja, once F4F Sessions spreadsheet finalised, to do F4F 2017 Flyers and LSG and Topic sheets (for office, planning purposes, and for website).

This report provides feedback on activities undertaken by myself and the office team according to the Balanced Scorecard contained within the Strategic Plan. Additional details available upon request.

Perspective	Objective	Indicators	Outcomes/Comments
DONORS	Workplan objectives are accurate and met.	• Number of workplan targets met. Number of workplan targets not met/adjusted.	Key DSO workplan items have been completed, shown over page.
DONORS	Grant Funds financially managed accurately and reports completed in a timely manner.	• Provision of financial reports and reconciliations as scheduled.	• All reports for DSO completed and submitted in time. • Reconciliation of final JFA small grants all done on time.
DONORS	Clear evaluation data collected and provided according to DSO Evaluation Plan.	• All required items planned to be fulfilled within the time frame (Part A, B, C).	Evaluation data all submitted on time to date (quarterly submissions). Jen done new Part C document, can be used also for the ILC submission in future—new Final Report is due in June so more before then.
DONORS	Accurate cash flow estimates enable investment returns.	• Cash flow investments return funds to F4F.	$100,600 invested in term deposit has been renewed for another 6 months at 2.24%. New account now earning monthly funds also. $38600 from NDIA on 9 December, $5500 due in January plus $44k.

Perspective	Objective	Indicators	Outcomes/Comments
DONORS	Local Support Group funds are expended as budgeted and reconciled accurately.	• LSG codes used for all expense sheets. • LSG job codes enable reporting by group. • Reconciliations of actuals to budget are undertaken regularly.	All codes have been utilised successfully. All excess funds were expended as approved. Current tracking of expenditure is in line with estimates, overall we have sufficient DSO funds to continue now until late 2017. **All new budget estimates to be approved by MC in the meeting.**
MEMBERS	We provide high quality, relevant programs that are easily accessible.	• Attendance at all sessions and events. • Overall average attendances by session/group. • Timely provision of session/event information flyers and group summaries and annual Calendar. • Number of new members.	Session attendance data is being collected and new members recorded. Calendars now being finalised given DSO 6 month funding decision but desire to continue until end of 2017. New member data will be provided in early 2017. Current membership TBC (last check was 582) - once Tonia back I will have this data.
MEMBERS	We educate, inform and upskill via our programs: local support group sessions, special sessions, newsletters and other.	• Number of eNewsletters sent out on time. • Number of special events and sessions. • Number of new topics. • Member feedback on topics re relevance, applicability to them, new information provided. • Number of complaints re flyer/website errors.	All scheduled sessions held as per Calendar. New topics—am working to plan for the development of all the new topics by their deadlines. To date, all feedback via evaluations have been positive re topic relevance, applicability and new information. More evidence being collected via Part C surveys and group evaluations (I am waiting to get onto these once urgent items are done).
MEMBERS	We offer informal advocacy and advice resulting in referrals that are accurate and timely.	• Number of phone and face to face advocacy and advice sessions. • Feedback from members re advice and referrals quality, accuracy, outcomes.	Jules—starting to keep this information re number of calls and meetings. Office volunteers (Rae, Gillian, Tonia and others) have been trying to ensure Jules has been provided with Mon/Fri off the phone.
MEMBERS	Our network builds a sense of belonging fostered via friendly, welcoming team members.	• Feedback from members re sense of belonging, welcoming of members.	Part C surveys are illustrating this, as has the film made by JFA using Enfield as our example LSG. Very positive feedback on this.
BUILD	Our member database and new member management system are professionally managed.	• Development of a new member checklist. • All other indicators relevant once new member database is in place.	New member database has been finalised and working well. Tonia has attended Access training to assist her with this. Jules is working with her Wednesday mornings to ensure errors re LSGs are gone.
BUILD	Our Hub is a secure, safe, clean, well maintained space.	• Revenue is reaped via Hub hire fees. • Feedback from members.	This has all been put on hold by the MC. Hub cleaning and maintenance - new volunteer re this?
BUILD	We deliver high quality guest presentations to a wide variety of audiences, thus increasing brain injury and F4F awareness.	• Establishment of speaker package and training. • Revenue is reaped via speaker donations/fees. • Feedback from audiences via emailed surveys. • Number of presentations.	Establishment of speaker package and training - who now to manage given Ken no longer is going to be involved with this? Handover materials from Ken to occur?

Perspective	Objective	Indicators	Outcomes/Comments
BUILD	Our Policy and Practice Manual guides our decisions ensuring equitable access for all.	• Development of Manual passed by MC. • Number of volunteers provided with induction. • Number of volunteers trained.	Policy and Practice Manual to be made up to date - new 2017 version to be done once roles clarified. Volunteers are provided with induction materials and manual upon their commencement. All to be updated.
KNOWLEDGE	We have a trained, motivated and empowered volunteer workforce - flexible, trained in multiple roles.	• Number of regular volunteers, new volunteers. • Number of training sessions for volunteers. • Percentage of core tasks with understudies.	HUGE issue for us moving forward. Either need paid help or more volunteers coming on board on a regular basis now that we are back with less team members on board—Jen to utilise Sonja as much as she can.
KNOWLEDGE	Our organization develops leading edge information topics/materials.	• Number of new topics and guest presenters. • Number of new topic deliveries annually.	New topics for 2017 were planned by Jen but Pat chose to develop some so now their development has gone back to Jen. Other guest presenters all confirmed by Jen for 2017, but now new topic work to be re-planned (Marie, Jen, Jules) - meetings to be held asap.
KNOWLEDGE	We explore new opportunities and develop new projects.	• Number of submissions (and those successful).	Jen submitted: 1 x large grant JFA (could be approved), DSO application (success) and Neuro Disability grant project (was 53% successful).

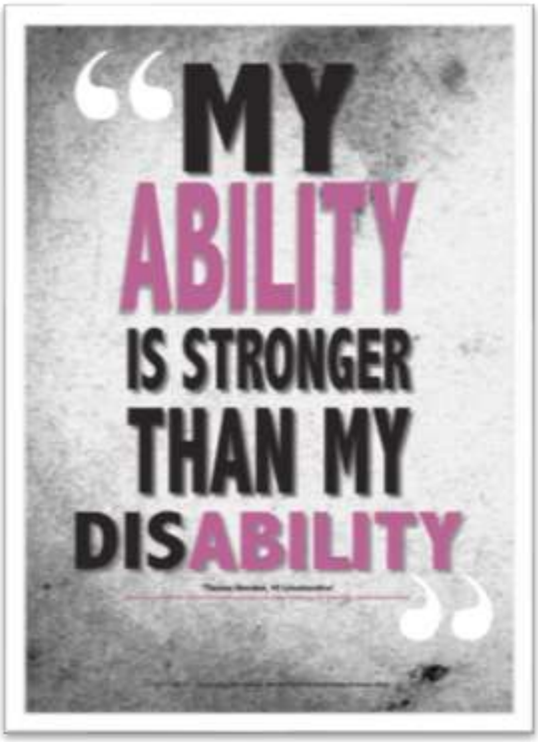
CAPSULE: PEER ORGANISATIONS CAN BENEFIT SIGNIFICANTLY BY LEARNING FROM FEEDBACK AND YOUR GATHERED EVIDENCE. CONTINUALLY STRIVING TO USE WHAT YOU HAVE DONE TO INFLUENCE WHAT YOU WILL DO CREATES EVIDENCE OF SUCCESS.

SELF STUDY Q7.4:
Describe three ways that your peer program team learns from its past performance (or three ways that it would like to be able to learn from its past performance).

SELF STUDY Q7.5:
Provide one example of a situation where your experience in delivering peer programs resulted in a successful outcome. Do you have any evidence of that success? Why or why not?

SHARING EVIDENCE WITH OTHER STAKEHOLDERS

The evidence you pull together and organize is also relevant in the wider community. Lack of community inclusion and accessibility constitute enduring challenges which the disability sector face. Using collated material and stories to demonstrate issues of this nature to the wider community possesses potential to bring greater awareness of the inequity encountered by people living with disability across Australia. Peer support group evidence can be part of the overall picture in raising this kind of awareness.



One of the ILC Outcomes sought by the NDIA is for 'people with disability actively contribute to leading, shaping and influencing their community' (see http://ilctoolkit.ndis.gov.au/outcomes/ilc-outcomes). Peer programs can use information they collect to illustrate key issues in the lives of their members as people living with disability. When significant and sizeable issues come up in their lives, peer programs can play a key role in supporting their attendees to express their concerns and have a say in their community.

We were provided with a powerful example of what can be achieved during 2018. In a influential campaign, 20 peer consumer groups came together to fight cuts of $13 million a year in funding for advocacy groups when the NSW state government transferred its disability services spending to the National Disability Insurance Scheme (NDIS) in July…… and won! The 'Stand by Me' campaign was run by the NSW Disability Advocacy Alliance that empower people with a disability to have a voice. This campaign was picked up by the Australian media, particularly in the NFP space, and the groups gained a successful outcome.

> **OPTIONAL LINKS: This story features on PeerConnect https://www.peerconnect.org.au/peer-network-stories/stand-me-peer-power-action/ and was also covered by https://probonoaustralia.com.au/news/2018/04/nsw-government-commits-disability-advocacy-funding/.**

This campaign is one example of a peer group playing a key role in giving people with disability a voice in our community. Another example, when a number of user led acquired disability organisations fought a government decision to close its state-wide rehabilitation centre, is discussed here: https://www.abc.net.au/news/2015-09-29/relocation-of-spinal-injury-services-leaves-patients-worse-off/6813846.

Stand By Me - Peer Power in action

Stand by Me was a campaign run by the NSW Disability Advocacy Alliance that empower people with a disability to have a voice.

In a powerful campaign, 20 peer consumer groups came together to fight cuts of $13 million a year in funding for advocacy groups when the NSW state government transferred its disability services spending to the National Disability Insurance Scheme (NDIS) in July...... and won!

You could almost hear the collective sigh of relief across the state when we woke to the news that our disability representative organisations and independent advocacy and information services will be able to continue to operate thanks to this funding commitment.

Physical Disability Council of New South Wales Executive Officer and NSW Disability Advocacy Alliance campaign spokesperson, Serena Ovens said.

"People with disability have been rightly very worried about the potential loss of our voice in the NSW community.

Providing members of the community – including participants, their families and friends, staff/management or other disability or peer support system stakeholders, elected officials, and the public – with information about your peer programs may lead to greater community buy-in for your user led organisation. By publicly sharing your findings, you are also contributing to the evidence base for peer support groups. It may be important for you to publish papers in peer-reviewed journals (you could possibly link in with a local University for a team approach, enabling this), share press releases with the media, or report to a larger stakeholder base (local or national advocates). You might want to present your results at a local or national conference. Each of these forums have different requirements for the types of information you present, your level of detail in describing results, together with presentation format.

When possible, consider involving key stakeholders in the reporting process. This may involve sharing preliminary results with staff, team members and/or group facilitators, local advocates, or others who have an interest in peer programs. These individuals can review your work and comment on whether your evidence and reporting 'makes sense' and gives the right level of detail. They may be able to offer alternative interpretations of the results as well, identifying things you may have overlooked or lending insights to complex findings. Make sure to build in time for stakeholder review to ensure that you are describing your program accurately as well as its impact appropriately.

Whatever format you choose for your result dissemination, it is essential you make them available in multiple formats. This will ensure your hard earned evidence is accessible to a variety of stakeholders—peers, advocates, funders, members, and the public. For example, if you create a technical report for the ILC, you may be advised to also create a one-page summary or infographic, highlighting the most important points using simple language, which can be shared with members, an MP or the public. Producing materials in various formats increases the impact of your evidence gathering, analysis and interpretation by helping reach diverse audiences in different ways. This will ensure that all those who played any role by contributing to the evidence gathering process, can see the results and appreciate the importance of their role.

Let us reflect upon some final issues relating to evidence sharing beyond ILC, internal management concerns and sharing of information with and for our key stakeholders:

1.. Grant Requirements are a minimum:

Let us first note that the data reported to funders, may or may not be the kind of information the community is interested in, or that you are keen to know about your peer program. Grant required data might also not be evidence you think is best to share with the public. This means that your evidence then cannot contribute to the evidence base surrounding peer support – this is because nobody will know the evaluation was conducted. One way to think about data reported to funders is that those efforts may represent the 'minimum' requirements for your evidence accumulation. You can then further develop this core information to boost your other evaluation goals.

2. We are not just looking for positive stories:

   Even if results do not indicate that the program has been working the way you hoped it would, you may apply the results to enhance efforts to make it better. Our focus is always on learning and improving, not blaming.

3. Economic Evaluations are a longer term requirement:

   In an ideal world, we would all have sufficient time, resources, expertise (and perhaps even energy) to undertake rigorous economic evaluations on our peer programs. For example, it would be incredibly beneficial for us to have overall findings that illustrate the longer-term savings secured by the NDIS thanks to the individual capacity building achieved by peer support programs. This may well be critical in securing immediate buy-in and long-term investment in peer support programs. Decision-makers and government bodies may eventually require concrete evidence of the financial benefits, sustainability and value added outcomes of peer support programs (see discussion at http://peersforprogress.org/resource-guide/cost-effectiveness-analysis-and-business-case/). In the US projects to develop similar relevant evidence have been undertaken with support from 'Peers for Progress'. For example, Cost-Benefit Analysis (CBA) has been undertaken which entails estimating and tallying the money value of the benefits and costs of peer support to the community. Cost-Effectiveness Analysis was also undertaken in these projects, which is a study that fully investigates the cost side but does not translate the benefits (NDIS core support reduced needs, reduced health and GP visits, illness prevented) into a monetary value. This approach can redirect resources from ineffective to effective programs and allocate resources from less cost-effective to more cost-effective care models. A Socio Economic analysis of a peer support program was funded by JFA Purple Orange funded project during 2014, and this report is available on the website also.

CAPSULE: PEER ORGANISATIONS CAN BENEFIT BY SHARING EVIDENCE COLLECTED AS BROADLY AS POSSIBLE WITHIN THE COMMUNITY TO RAISE AWARENESS AND BE PART OF THE SOLUTION TOWARD TRUE EQUITABLE ACCESS AND INCLUSION.

SELF STUDY Q7.6:
Describe two ways that your peer program shares its stories and/or successes publicly.

SELF STUDY Q7.7:
Describe ways in which you are able to learn about things NOT going to plan and needing to be improved. Describe one way that this process of learning about less successful performance could be improved.

IN SUMMARY

During this section of the training package we have explored the various ways you can use your collected evidence internally and externally. We have discussed the benefits you are able to derive from your tailored evaluation plan. We consider your evidence will enable you to bid against larger players in the marketplace and 'punch above your weight' as a user-led organisation competing for ILC grants. We also discussed the significance of utilising your evidence to learn over time. You can create success by striving for utilising what you have done to influence what you will do and the ILC team seeks learning from this feedback.

Being user-led organisations, driven by the concepts of equity, accessibility, inclusion and community, it is likely the information you gather will be relevant for sharing across the wider community. Your stories and the ways your peer program can share them, can develop into a united energy and passion. This is potentially capable of changing the wider community, benefiting even more people living with disability. If our efforts can be helpful towards greater disability awareness and inclusion, then we are all winners from the evidence composition processes undertaken in any peer organisation.

Our team would like to thank you for the significant investment you have made by working your way through this training package. We are keen to develop more resources which support peer organisations to 'punch above their weight'. Your feedback is invaluable to us as we develop this package and future resources. As such, if you can please provide your feedback via the package website we would be most grateful.

REFERENCES:

- The ILC Toolkit is available online and includes an excellent overview of the ILC outcomes approach - http://ilctoolkit.ndis.gov.au/what-are-outcomes. The recently announced new ILC investment strategy is available online in PDF and WORD formats: https://ilctoolkit.ndis.gov.au/ilc-funding. ILC are planning to release an Easy English version in early 2019.
- Disability SA content regarding a good feedback culture can be viewed at https://www.sa.gov.au/topics/care-and-support/disability/service-providers/feedback).
- The 'Stand by Me' campaign gave people with a disability a voice - see https://www.peerconnect.org.au/peer-network-stories/stand-me-peer-power-action/. It was also covered by ProBono news among other locations: https://probonoaustralia.com.au/news/2018/04/nsw-government-commits-disability-advocacy-funding/.
- User led acquired disability organisations fought a government decision to close its state-wide rehabilitation centre, is discussed here: https://www.abc.net.au/news/2015-09-29/relocation-of-spinal-injury-services-leaves-patients-worse-off/6813846.
- Rigorous economic evaluations on our peer programs may be essential in the longer term - see discussion at http://peersforprogress.org/resource-guide/cost-effectiveness-analysis-and-business-case/
- A Socio Economic analysis of a peer support program was funded by JFA Purple Orange funded project during 2014, and this report is available here.
- Links to the Families4Families example used during this training package is available HERE including the full table of evidence referred to in this Section, along with an overview of the background survey development, is available here.