

Recording alternate forms of service delivery

This fact sheet provides information to assist organisations on how to record telephone, virtual or remote service delivery in the Data Exchange. The global health pandemic in 2020 has led organisations to shift their service delivery to meet the changing landscape; increasing their use of telephone, virtual and/or remote delivery methods to ensure clients still have access to the services they need.

The Data Exchange helps funding agencies and organisations work together to shift the focus of performance measurement from outputs to the more meaningful information about service delivery outcomes. It has been designed to record services delivered to clients, rather than organisational effort to administer services.

As per the Data Exchange Protocols, clients are defined as ‘individuals who receive a service as part of a funded activity that is expected to lead to a measurable outcome’. This definition includes a number of components that must be met in order to count a person as a client. These components are program and context specific and involve determining whether the individual in their own right, is expected to achieve an outcome and linked to a program specific objective.

We appreciate the benefits that can come from these alternate methods and encourage organisations to continue to consider which services delivery methods best suit their clients. As we continue to receive feedback and examples of alternate forms of service delivery we will update this fact sheet, and as required the Data Exchange Protocols.

The following pages provide examples of the different types of alternate service delivery methods, along with recommendations on how to record these into the Data Exchange if appropriate. Whilst we have provided some examples, not every possible scenario has been captured. Please use this document as a guide and apply the policy explanations to your own situation.

If it is not appropriate to record some of your alternate service delivery instances in the Data Exchange, other avenues such as an *Activity Work Plan* progress report (if applicable), may be better placed to capture/report these. Please discuss this further with your Funding Arrangement Manager, if required.

Service Delivery Method	Policy Explanation	Examples	Recommendations
<p>Telephone Services</p>	<p>Telephone services should only be counted as service delivery where they can be expected to lead to a measurable outcome</p>	<p><u><i>Scenario 1:</i></u> Jean attends a counselling session via the telephone.</p> <p>✓ <i>Record this in the Data Exchange as the call will lead to a measurable outcome for Jean.</i></p> <p><u><i>Scenario 2:</i></u> Joshua rings and requests assistance with a matter. Due to the pandemic, the organisation indicates they are now delivering counselling via phone and books a telephone appointment for Joshua.</p> <p>✗ <i>Do not record this interaction in the Data Exchange as there has been no measurable outcome for Joshua at this stage.</i></p> <p><u><i>Scenario 3:</i></u> Jasmin rings and requests assistance with a matter. The organisation spends 30 minutes with Jasmin unpacking her issues and working through some options Jasmin can implement now. It is not appropriate for the organisation to collect Jasmin's personal details during the call.</p> <p>✓ <i>Record this interaction in the Data Exchange as the call will lead to a measurable outcome for Jasmin.</i></p>	<ul style="list-style-type: none"> • The interaction must lead to a measurable outcome in order for it to be recorded in the Data Exchange. • Where possible, capture information about your clients. Where this is not possible, record them as 'unidentified'. • If you receive multiple calls, similar to Scenario 3, throughout the day where it is not appropriate to collect a client's personal details, you can record your clients as 'unidentified' or group clients for the same service type, under one session. • Record outlets as the outlet from which the staff member would usually work. Please do not add a personal home address as an outlet. • Use the 'Service Setting' field to record how you delivered the service. (Telephone or Video) • If you are recording higher numbers of unidentified clients please contact/advise your Funding Arrangement Manager in writing, outlining the data changes, prior to the close of the reporting period.

Service Delivery Method	Policy Explanation	Examples	Recommendations
<p>Virtual Services</p>	<p>Virtual services such as website or Facebook views should only be counted as service delivery where they can be directly linked to clients, and expected to lead to a measurable outcome.</p> <p>Virtual interactions must include two-way engagement with the client/s</p> <p>Questions you can ask to help you clarify:</p> <ul style="list-style-type: none"> • Can the client ask questions or seek assistance in real time? • Can you accurately monitor how many people are attending a session? • How do you know an individual client has engaged with the content? • Can you measure the outcome that occurred as a result of the session? 	<p><u>Scenario 1:</u> Your organisation has uploaded a pre-recorded video to your website on parenting. Clients do not need to register to view the video and there is no 2-way interaction with viewers.</p> <p>✗ <i>Do not record this in the Data Exchange as you cannot measure what the outcome may have been. There is also no accurate way of capturing how many clients actually watched it.</i></p> <p><u>Scenario 2:</u> Tarik logged into a Zoom online parenting session where he could ask questions about his situation, seek clarification and participate in discussions with other participants. Tarik registered for the session.</p> <p>✓ <i>Record this interaction in the Data Exchange as the session will lead to a measurable outcome for Tarik and his attendance can be accurately captured.</i></p> <p><u>Scenario 3:</u> Your organisation posts a Facebook feed targeting fathers. Forty people click on the link that takes them to an information sheet with some parenting tips and information about an upcoming course.</p> <p>✗ <i>Do not record this in the Data Exchange as no outcome can be measured at this stage.</i></p>	<ul style="list-style-type: none"> • The interaction must lead to a measurable outcome in order for it to be recorded in the Data Exchange. • Where possible, capture information about individual clients. Where this is not possible, record clients as 'unidentified'. • Record outlets as the outlet from which the staff member would usually work. Please do not add a personal home address as an outlet. • Use the 'Service Setting' field to record how you delivered the service. (Video) • If you are recording higher numbers of unidentified clients please contact/advise your Funding Arrangement Manager in writing, outlining the data changes, prior to the close of the reporting period.

Service Delivery Method	Policy Explanation	Examples	Recommendations
<p>Online Services, Postal Services, Email</p>	<p>When clients engage online with non-interactive resources or material is sent by post or email, it can be difficult to accurately determine how many clients engaged, and whether this material assisted them or changed their circumstances.</p> <p>If organisations provide follow up with clients such as:</p> <ul style="list-style-type: none"> • a survey or questionnaire • telephone call to discuss the content • an activity workbook for clients to complete and return, <p>then this will allow you to determine if the client has engaged with these non-interactive services in a meaningful way.</p> <p>Where clients have returned feedback, or participated in a discussion about the content, this can be reported as a session and service in the Data Exchange.</p>	<p><u>Scenario 1:</u> Daisy receives her session pack via the post. This workshop was previously delivered face to face. Now it is delivered as a paper based workshop to be completed individually. As part of participating in this workshop, Daisy completes a workbook and sends it back.</p> <p>✓ <i>Record this in the Data Exchange as the activity workbook responses from Daisy allow you to see a measureable shift in her knowledge and understanding.</i></p> <p><u>Scenario 2:</u> Damien participated in an online eLearning module. The module was self-paced and non-interactive. A survey was included at the conclusion of the module to gage the level of engagement, impact and satisfaction.</p> <p>✓ <i>Record this in the Data Exchange as the eLearning module and survey responses from Damien allow you to see a measureable shift in his knowledge and understanding.</i></p> <p><u>Scenario 3:</u> Your organisation sends out a weekly bulk email to your client list. As part of the content, the email includes tips and advice on how to manage their mental health and wellbeing.</p> <p>✗ <i>Do not record this in the Data Exchange as no outcome can be measured and there is no accurate way of determining who read the email.</i></p>	<ul style="list-style-type: none"> • The interaction must lead to a measurable outcome in order to be recorded in the Data Exchange. • Where possible, capture information about your clients. Where this is not possible, record clients as 'unidentified'. • Use the 'Service Setting' field to record any online, non-interactive services. (Online service) • Record outlets as the outlet from which the staff member would usually. Please do not add a personal home address as an outlet. • If you are recording higher numbers of unidentified clients please contact/advise your Funding Arrangement Manager in writing, outlining the data changes, prior to the close of the reporting period.