**COVID-19 Data Collection Guidance**

This guidance is focused on the new data collection process for COVID-19 customer updates. The purpose of this process is:

* To ensure the recording of all customer updates about the impact on COVID-19 are in one location – creating a master spreadsheet of the data.
* To ensure that the data recorded is consistent – this allows for comparable data and to understand trends and clusters of need quickly and efficiently.
* To inform our decision-making processes with robust data that is continually updated and revised due to the ever-changing circumstances.

RMs will carry out the following process for data collection:

1. **Speak to organisation** - Via e-mail or on the phone and use the standardised questions as a guide to discuss updates on the organisation in these new circumstances.
2. **Fill in the Form -** Using the standardised form to input the information into our database – choosing from dropdown boxes to answer as many questions as you can, based on both your knowledge of the organisation and the conversations you have been having.
3. **Update information –** If the circumstances for the organisation change, then you just need to fill in the form again. For the second time you fill out the form, you don’t need to complete all categories and just fill in the boxes where the change has happened.

**Things to remember:**

* **The more data, the better -** We are looking to collect as much of this data as we can as quickly as possible. This means that please fill out as much information as you can in all categories and avoid leaving blanks against any unless completely necessary. This means drawing on all knowledge of the organisation, and not just the conversation. All information can be changed if other things comes to light.
* **Prioritising information over nuances -** We understand that some of the categories will not always ‘fit’ to what an organisation is experiencing. You may want other information to be included to contextualise a category. For example, although an organisation has lost 100% of volunteers, this is only 1 person with still a 20-strong workforce. This is not to say that this information is not important, but we are not looking to include this information. The simpler the information, the easier it will be to analyse. If you do want to include other information, please complete the open-ended text box in the form.
* **Assuming is just as good as asking –** Some of these questions are quite personal and it is not necessary to ask about all measures that we are recording in our database.
We are taking the approach that, if an organisation doesn’t mention certain things as a high concern in conversations, then it is unlikely to be a problem.
For example, if an organisation does not tell the RM that a lot of their staff are vulnerable and have underlying heart conditions then it is unlikely to be an issue and we can assume ‘No staff in vulnerable group’. If this changes and the organisation share more information about this area, then the category can be updated.

**Measures**

**Organisation**

* ***Unique Investee Number:*** This is for the organisation’s salesforce ID. This is critical for us to record so we will be able to backdate this information and link it to salesforce when we have more capacity.
* ***Fund:*** This is which SIB fund that organisation has received a grant or loan from.Some organisations may have been part of two funds, so please choose the fund that they received the largest amount of support from.
* ***Focus of Organisation:***This is what the organisation mainly works on e.g. Childcare, Professional Services. You can choose two – a primary and secondary focus for each organisation. Dependent on the organisation, only completely

**Staff and Volunteers**

* ***Staff Capacity –*** This is referring to the impact of COVID-19 on staff capacity. A limited staff capacity might be due to care responsibilities or becoming ill with COVID-19.
* ***Volunteer Capacity –***This is referring to the impact of COVID-19 on volunteer capacity. Limited voluntary capacity might be due to having to stop any volunteer roles due to lockdown measures or if they are from a vulnerable group.
* ***Ability to pay staff without government support –*** This is referring to the time period organisations can pay staff without relying on some form of government support.
* ***Staff Vulnerability –*** This is referring to the extent the organisation’s staff is in a vulnerable group and therefore more susceptible to being seriously ill if they catch COVID-19.
* ***No. of FTE Staff/No. of FTE Staff on furlough –*** Numbers of full-time equivalent staff and how many of these are on furlough.

**Finances**

* ***Ability to pay operational costs without government support -*** This is referring to the time period organisations can pay operational costs without relying on some form of government support.
* ***Risk to Income –*** This is a judgment on the risk that the organisation’s income will decrease due to the current circumstances. **Low** *–* It is unlikely that the organisation’s income will be effected.
**Medium** *–* Some of the organisation’s income is decreasing/likely to decrease or All of the organisation’s income is decreasing but not significantly.
**High***-* The majority/all of the organisation’s income is decreasing/stopped.
* ***Risk to Cashflow/Reserves –*** This is a judgment on the risk that the organisation’s cash flow/reserves and its ability to support a organisation when income has been depleted.
**Low** *–* The organisation’s cash flow and reserves are high and can support the organisation for a lengthy period of time if needed.
**Medium** *–* The organisation’s cash flow and reserves will be able to support a organisation for 3-6 months if needed.
**High** *–* The organisation has limited cash flow and very low reserves and therefore, will not be able to support the organisation if needed.
* ***Time till Cash Position Critical –*** This is the length of time before an organisation is unable to continue to operate without additional funding.
* ***Org (i) part of retail, leisure or hospitality sector which (ii) operates from a premises with a rateable value between £15,000 - £51,000/ Org eligible to receive either Small Business Rates Relief or Rural Rate Relief –***These are extra questions to gather more information on the organisation’s eligibility to governmental support.

**Delivery**

* ***Demand* –** This is the possible change in *need* for the organisation’s services amongst the population. The measure accounts for both an increase and decrease in need.
For example, amongst the community, there may be an increase in need for advice services due to high levels of furlough.
This measure is not impacted by whether the service can meet that need, as it might have been forcibly closed but instead focuses on the community needs.
* ***Supply Chain –*** This is the amount of supplies and resources that cannot be accessed by the organisation to be able to deliver its services.
* ***Beneficiary Vulnerability –*** This is referring to the extent the organisation’s beneficiaries are a vulnerable group and therefore more susceptible to being seriously ill if they catch COVID-19.
* ***Service Delivery –*** This is referring to the reduction of organisation’s service delivery. There could be a range of factors being impacted by this, including staff capacity, reduced demand or enforced closure.
* ***Closure –*** This is referring to whether the organisation is continuing to deliver services or it has been closed for different reasons.

**Contingency Plan/Support**

* ***Contingency Plan –*** Whether the organisation has begun thinking about a contingency plan and possible modifications in place.
* ***Staff WFH –*** If most staff are working from. This includes if some back-office staff are working from home, but others are not.
* ***Conversations with Funders/Creditors/Insurers –*** If the organisation has had conversations with their funders/creditors/insurers about the current status of their relationship and if there is any flexibility with it. SIB is not included with this.

**Advice and support**

* ***Awareness of support offered by Government/Other Support –*** Whether the organisation is aware of the support to businesses provided by government.
* ***Awareness of support offered by Sector/Other support bodies -*** Whether the organisation is aware of the support to businesses provided by sector and other support bodies, and if it is aware of where this information is.
* ***Tries to access any of this support –*** Whether the organisation has tried to access these different types of support, and their experience in doing do.

**SIB Support**

* ***Payment Holiday –*** Whether the organisation has accepted a payment holiday to their live SIB loan - only relevant for Loans and only if offered.
* ***Liaising with funders-*** If the organisation has asked for SIB to weigh in on conversations with funders and other central bodies.
* ***Business support likely to be required*** *–* If the organisation is likely to need business support from SIB in the future.

**Post Covid-19 Recovery**

* ***Speed to Recovery after Covid restrictions relaxed –*** Length of time the organisation estimates it will need to fully recover following Covid restrictions being relaxed.
* **Non-Financial barriers to recovery –** Other areas that may impact the organisation, other than financial. You can choose more than one area for this question.
* ***Prepared/Able for repayable finance to support survival/recovery aims –*** Whether the organisation feels able to use repayable finance tosupport recovery aims. The options account for various interest rates.