CONSULTANTS

Monitoring on a shoestring: How reproducible reporting can help make better use of data.

Dr Stephanie Quail and Sophie Henness



Acknowledgement of Country

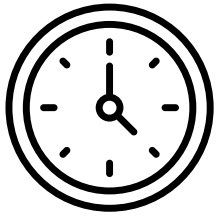


We also acknowledge the talent and artistry of Emma Walke, who designed the artwork for our acknowledgment of Aboriginal and Torres Strait Islander peoples. The design shows a story of connection to country and people, representing the breadth of work we do with Aboriginal and Torres Strait Islander communities across Australia. The colours represent the land, and the lines in between represent the water that connects us all.

Why do we need monitoring on a shoestring?

The challenge

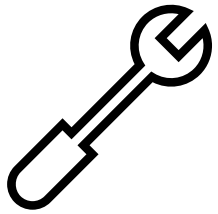
- Common barriers to measuring and monitoring client satisfaction include:



Time



Resources



Staff skillsets

A low-cost, high-impact solution

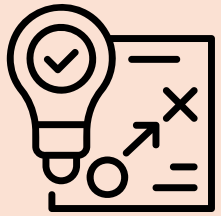
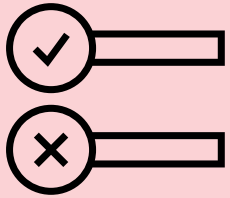
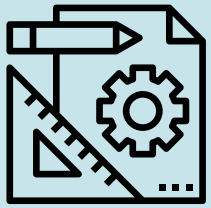
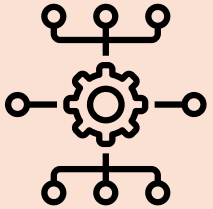
- Free online survey platforms.
- Open-source software, code-based analysis and reporting.

The case study

Bonnie
Support Services



A practical guide to monitoring client satisfaction on a shoestring

1	2	3	4	5
				
Think about what you want to know, who you want to reach	Decide on the right survey platform for you	Build, test and refine survey & reporting plans	Use free software to build reproducible analysis and reports	Run reporting regularly to support continuous improvement

* All content we cover is all included in our free, downloadable toolkit we will share at the end of this presentation!

1. Think about what you want to know, who you want to reach

- Who do you want to hear from?
  - Where are they located? Where will they complete the survey?
  - English proficiency?
  - Accessibility requirements?
  - Feedback on one or multiple services?
- How often do you want to invite feedback from service users?
  - Aligned to service milestones?
  - Ad-hoc?
- Design and build a draft survey



2. Decide on the right survey platform for you

- Does your organisation have access to an online survey platform?
- Consider:
  - How many questions do you plan to include in your survey?
  - Does the survey need to be available in multiple languages?
  - Do you need to use display logic, where not all questions are shown to all respondents?
- Pick a platform that fits your survey OR build your survey to meet free platform constraints.

Survey platform	Benefits	Limitations
Google Forms	• Free • Unlimited responses and duration • 200 question limit per form • Has some basic survey logic e.g. branching	• No advanced survey logic e.g. conditional logic, text piping • 200-question limit • Questions and responses of the Google Form are in the language they are written.
Qualtrics	• Very powerful survey logic, including display, branch and skip logic • Good options for translated surveys	• Paid account is expensive • Free version limits features and responses per survey
Survey monkey	• Has a free option • Supports skip logic and more advanced branching	• Free option is limited to 10 questions per survey and limited responses per survey.
Jotform	• Has a free option • Supports skip logic and more advanced branching	• Free option is limited to 5 surveys and 500 responses.
Accessible Surveys	• Very powerful survey logic, including display, branch and skip logic • Good accessibility options	• Expensive

3. Build, test, and refine survey & reporting plans

Consult with staff and service users to:

Make sure your survey is collecting what you want and need.

Get clear on what you want to track in your monitoring reports.

Build a shared understanding of what is useful.

4. Use free software to build reproducible analysis and reports

- The time needed to build analysis and reporting is often a barrier to analysing and using monitoring data in a timely manner.

Why use code for analysis and reporting?

- Leverage the consistency of monitoring data
- Bespoke analysis and reporting
- Build once, re-use repeatedly
- Conduct analysis and build a report – all in one document

What this can look like

- Create an RNotebook in Rstudio
  - Data cleaning
  - Analysis
  - Data visualisation
- Generate a reproducible report, ready to be shared with stakeholders.

- With a good template and some guidance, you can build your own analysis and reports using code

5. Run reporting regularly to support continuous improvement

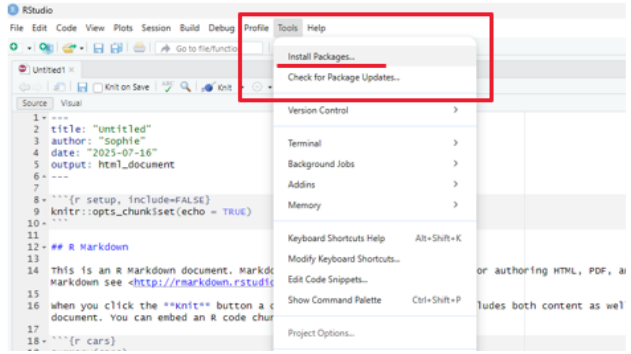
- Set yourself up to run and re-run these processes at regular intervals
  - Document processes for how and when to run the analysis and reporting code
  - Train up one or more staff to be able to generate reports.
- Consider semi-regular additional analysis or monitoring of open-text responses

2. R Report

First install R and RStudio and the required packages following the instructions below. Open the report in R and run it. After running the Report in RStudio, the output will be a fully formatted Word document that serves as the final report. This document includes all the generated tables, graphs, and translated survey responses, automatically compiled based on the input data and code.

2.1 Installing R and the necessary packages

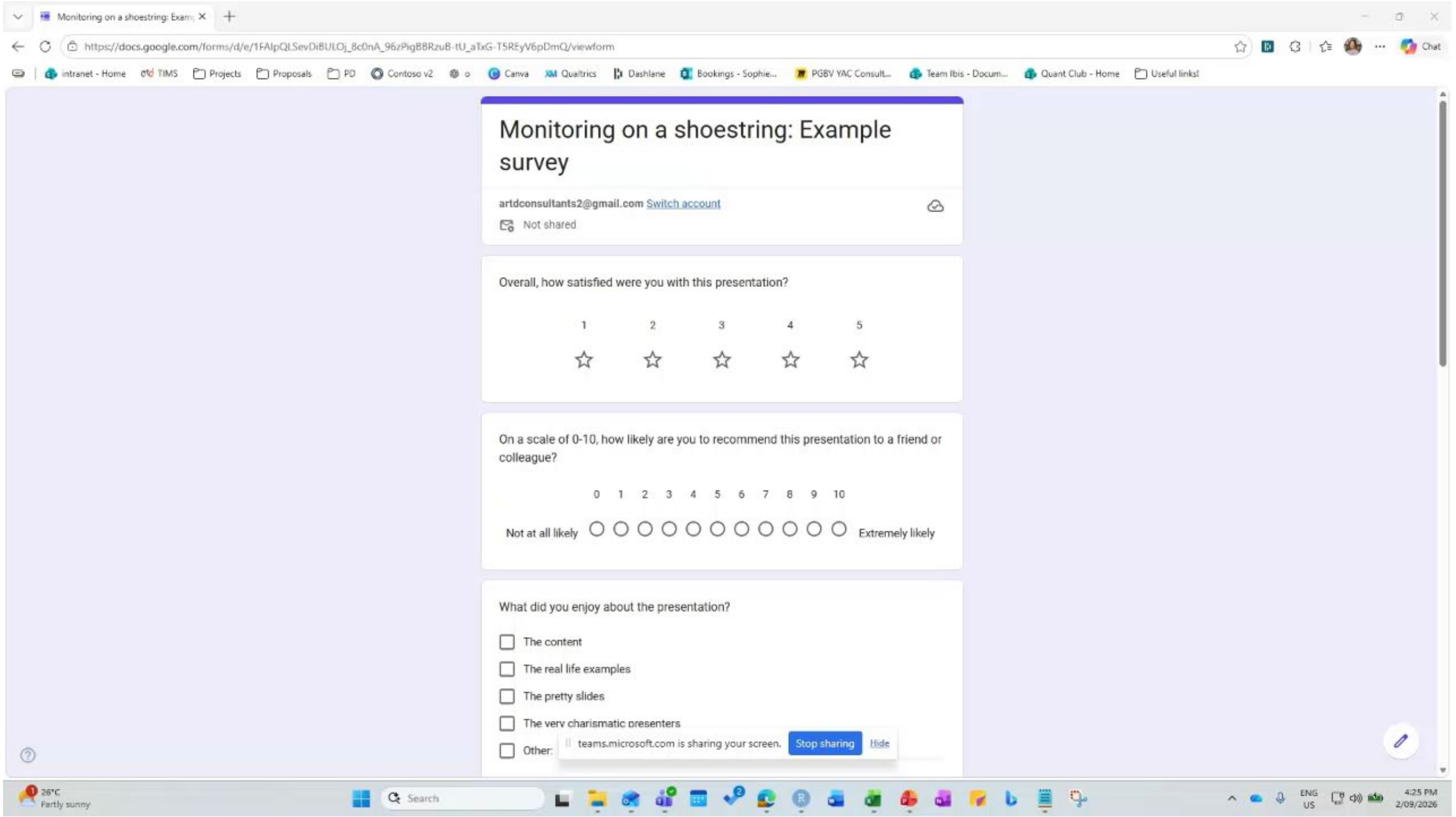
- **Download R**
  - link here for instructions for a mac: How to Download & Install R and RStudio on Mac - The Mac Observer
  - link here for instructions for windows: Install R and RStudio for Windows | RStudio | TC Technology Knowledge Base
- Open **RStudio**
- Install **R Packages**:
  - Click on the **Tools** menu at the top
  - Select **Install Packages...**



What this looks like: a brief survey of audience satisfaction

Complete this survey to give feedback on this presentation!

To share your feedback, scan this QR code.


Monitoring on a shoestring: Example survey
artdconsultants2@gmail.com Switch account
Not shared
Overall, how satisfied were you with this presentation?
1 2 3 4 5
On a scale of 0-10, how likely are you to recommend this presentation to a friend or colleague?
0 1 2 3 4 5 6 7 8 9 10
Not at all likely
Extremely likely
What did you enjoy about the presentation?
The content
The real life examples
The pretty slides
The very charismatic presenters
Other:
teams.microsoft.com is sharing your screen.
Stop sharing
Hide

Reflections

1. **Reproducible reporting and monitoring on a shoestring is more accessible than it seems!**
2. **Don’t let your client feedback surveys gather dust!**
3. **Don’t be scared of code!**

What next?

Complete this survey to give feedback on this presentation!

To share your feedback, scan this QR code. We will analyse and share this data as part of our free, downloadable demonstration of analysis and reporting code.

Visit our Linktree to access our free resources!

This free resource includes:

- Tips for the 5 stages of monitoring client satisfaction on a shoestring
- A demonstration dataset with code to analyse and report on survey data

Any questions? Connect with us!



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