



project

maximising the value of survey
data in adult social care

QORU

quality and outcomes
of person-centred care
research unit

Creating reports of analysis findings to engage with decision-makers in your organisation

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THE LONDON SCHOOL
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Purpose of presentation

- Provide background to why reporting tools are included in the MAX toolkit
- Offer guidance on how engaging reports can be produced without engaging with report-recipients
- Introduce relevant elements of the MAX toolkit
- Hopefully convince you to read the MAX reporting guide!

Current reporting practices

Review of ASCS & PSS SACE survey reports [46 from 18 LAs] found:

- **Majority of reports:** focused on **describing the data** and most common form of analysis was **direct comparisons of ASCOF scores**
- **Minority of reports:** included the **findings from more detailed analyses** (e.g. chi-square) [6 LAs] or **contextual information** needed to interpret findings [2 LAs]

Survey reports also tended to be long and contain a lot of tables and charts

Survey	Pages	Charts	Tables
ASCS	18-75	5-48	0-65
PSS SACE	5-48	1-44	0-53

Is this useful?

Report-recipients (e.g. commissioners, managers) have indicated that this style of reporting is **not useful** and **cannot be used to inform local decision-making**.

They've literally gone through each question and just kind of reported on it, but, by the time it goes through to the commissioners, it doesn't work. It's kind of 50 pages of graphs and pie charts and it doesn't work [Commissioner]

As a result, many did not read the reports or use the data, citing that the surveys had limited local value, and/or conducted their own analysis.

Current reporting barriers

Report-producers (usually analysts) identified a number of barriers associated with the production of ASCS and PSS SACE reports:

- **Difficulties with identifying and engaging with report-recipients** (e.g. to discuss info needs and reporting preferences)
- **Uncertainty how to handle survey data and conduct & interpret analysis** (e.g. to establish attribution)
- **Difficulties with presenting data appropriately**

As a result, many resorted to describing all the data

Does this really matter?

A waste of time and resources?

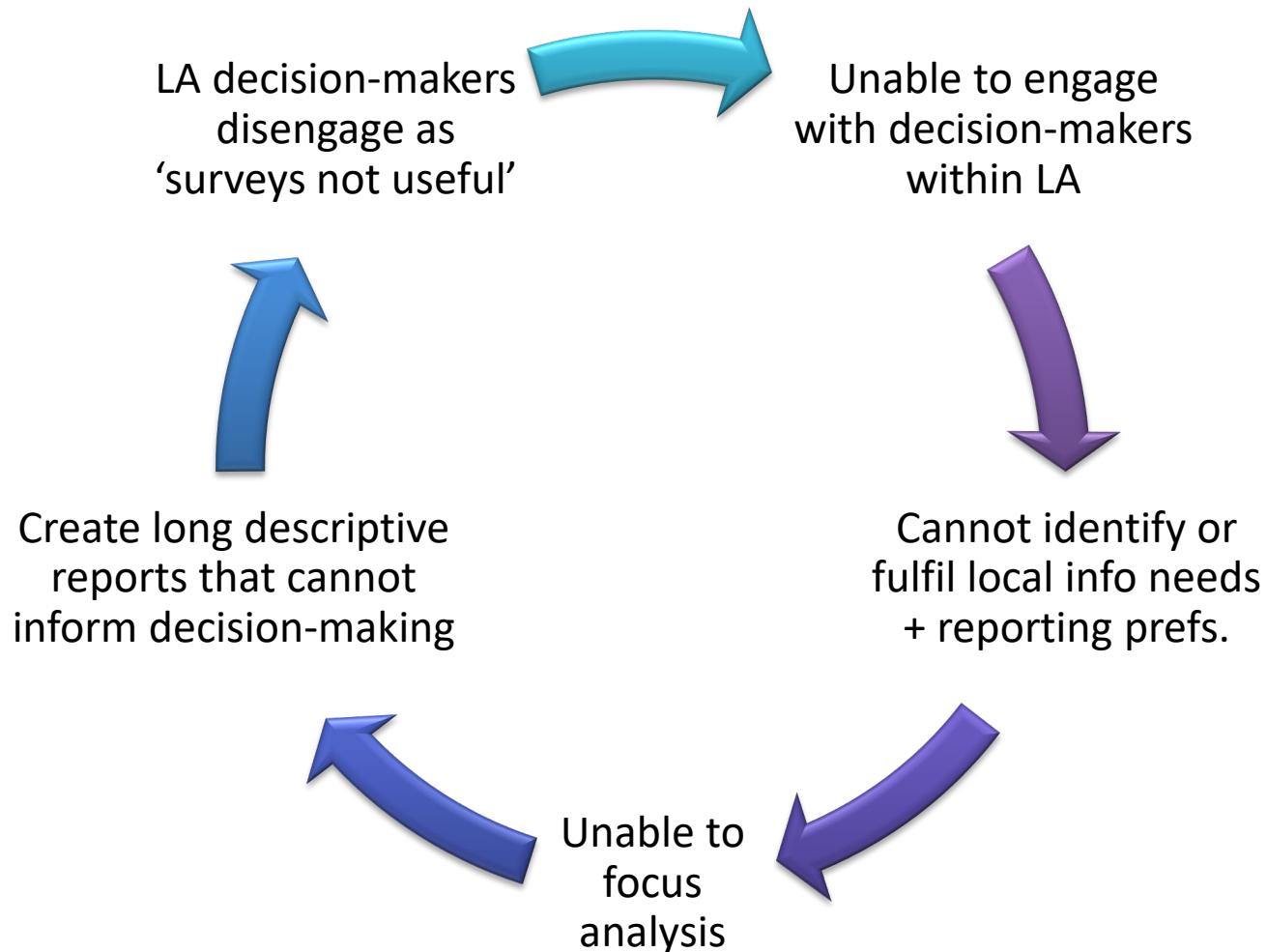
- **Report-producers** collect, analyse and report ASCS and PSS SACE data but findings are not always used locally.
- **Report-recipients** do not use data or conduct their own analysis and/or local research and consultations.

A missed opportunity?

The surveys produce **robust data** and is collected from a **large sample** of adult service users and carers. **Potentially the most significant piece of local research conducted by an LA.**

A self-perpetuating problem?

Reporting difficulties influence and are influenced by difficulties experienced at other stages of the survey process.



How the MAX toolkit can help

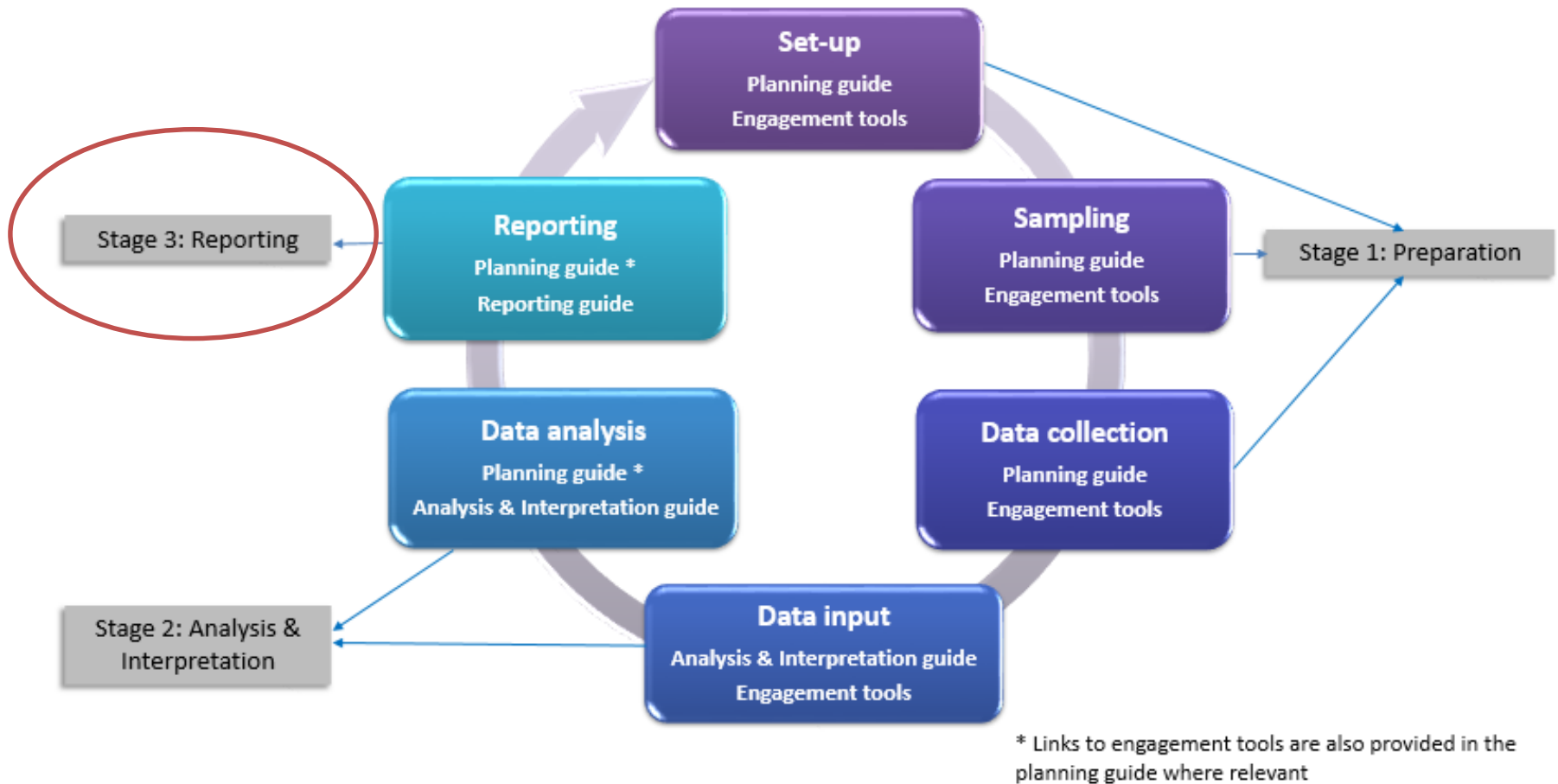
Engagements with LA decision-makers are key to maximising the local relevance, value and use of ASCS and PSS SACE data but many LA analysts struggle to engage.

Planning element → how to initiate & maintain engagements during the survey process.

Reporting element → how to create reports of analysis findings that can be used to initiate engagements.

Reports can be produced without engaging with LA decision-makers. Therefore, useful if engagement is currently a problem in your organisation.

The reporting element of the MAX toolkit



The reporting element forms one part of the MAX toolkit but links to other relevant elements [see MAX reporting guide].

Creating engaging reports

Strategy: an engaging report of ASCS and PSS SACE analysis findings can be created in two steps:

1. Identify and fulfil local information needs
2. Produce concise and focused reports that fulfil local information needs and reporting preferences

Tip: focus on what the findings mean and how they can be used to inform local performance improvement.

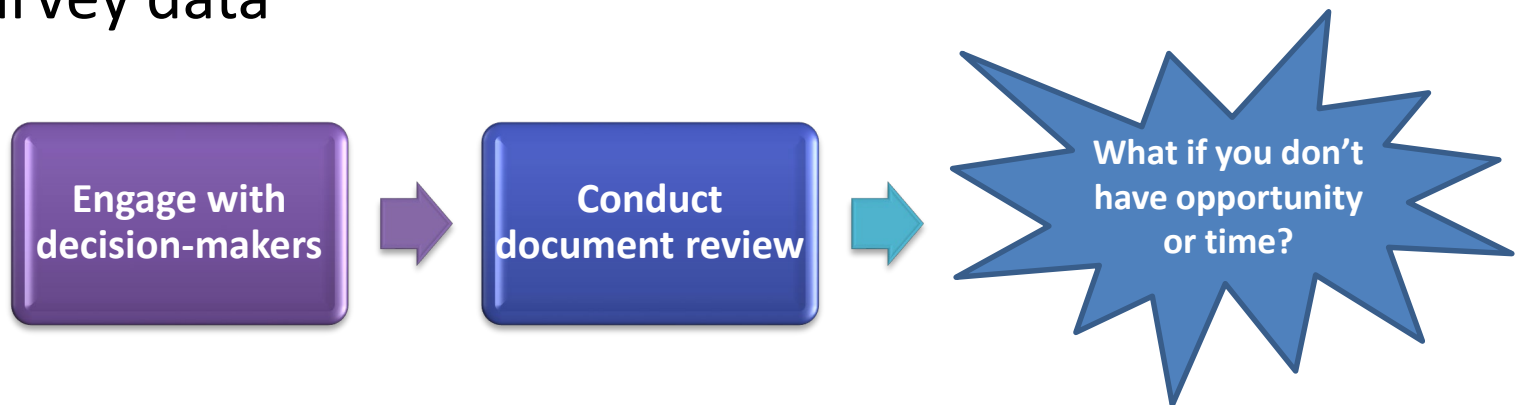
It's not about presenting a survey; it's about what people need to know do develop the business [Manager]

Step 1: identify and fulfil local info needs

Strategies for **fulfilling local info needs** with survey data



Strategies for **identifying local info needs** that can be fulfilled with survey data



Focus on general info needs

Report-recipients involved in earlier activities described the kinds of survey info that could support their decision-making.

Info	Description
Performance data	<ul style="list-style-type: none">Meaningful comparisons of ASCOF data (e.g. over time, between LAs)
'Interesting' findings	<ul style="list-style-type: none">Areas of marked change or unmet need where further investigation or action may be required
Contextual data	<ul style="list-style-type: none">Supplementary information that can support the interpretation of analysis findingsPotential sources include respondent comments, local research, LA records

This requires **going beyond the 'descriptives'**. The analysis element of the MAX toolkit can help you to do this.

Step 2: Produce report(s)

Engaging reports of ASCS and PSS SACE analysis findings can be produced in three stages:



Determine key messages

Before you can determine how to effectively present a message you must first know what the message is [Stephen Few]

Message	Example
General trends	With the exception of 2012/13, all ASCOF scores for LA X have steadily increased since 2010/11
Notable changes	Most notable improvements (year on year comparisons) = satisfaction [ASCOF 3A], safety [ASCOF 4A] and impact of services on safety [ASCOF 4B]
Areas of interest	Potential concerns (e.g. unmet needs, low performance against comparator and national scores), instances of good practice and areas for further investigation
Implications	How findings can be used locally

At this stage, key messages can be written in draft form but should be linked to relevant findings from further analysis.

Text, table or chart?

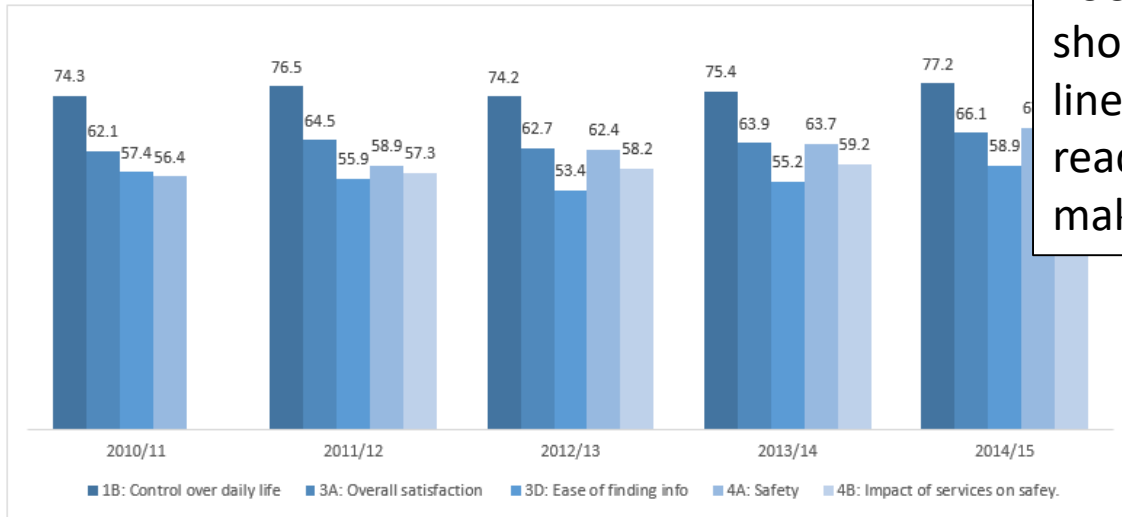
Establishing the **most appropriate method** of communicating key findings can be challenging and is **one of the most common reporting errors**.

Method	When to use
Text	<ul style="list-style-type: none">• Describing two values• Summarising patterns in larger dataset (e.g. data displayed in tables and charts)
Table	<ul style="list-style-type: none">• Describing three or more values and/or multiple units• Communicating the quantitative aspects of the data• Readers need to know the numbers
Chart	<ul style="list-style-type: none">• Describing three or more values• Communicating the qualitative aspects of the data• Readers need to know the general trends or patterns

Key source: Ehrenberg (1978)

Example

Displaying year-on-year comparisons of ASCOF scores.



ASCOF comparisons often shown in column charts or line graphs. Does not allow reader to clearly see trends or make comparisons.

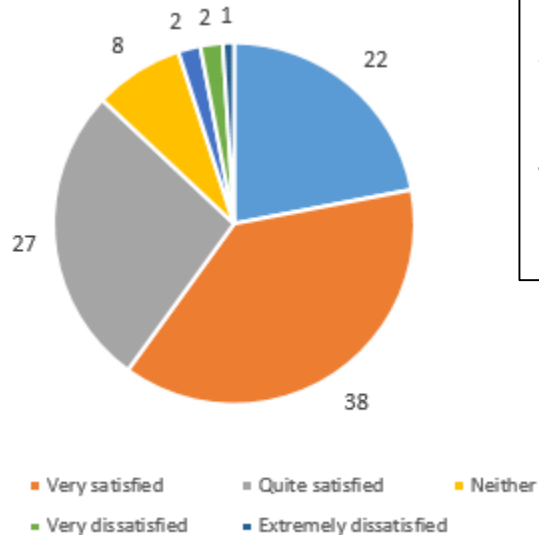
With the exception of 2012/13, all ASCOF scores for LA X have steadily increased since 2010/11

Reader needs to know the numbers so a table is more appropriate.

	2010/11	2011/12	2012/13	2013/14	2014/15	Change since last year
1A: Social care-related quality of life	18.7	19.2	18.9	19.1	19.4	0.3
1B: Control over daily life	74.3	76.5	74.2	75.4	77.2	1.8
1L: Social contact				72.3	73.2	0.9
3A: Overall satisfaction	62.1	64.5	62.7	63.9	66.1	2.2
3D: Ease of finding info	57.4	55.9	53.4	55.2	58.9	3.7
4A: Safety	56.4	58.9	62.4	63.7	67.2	3.5
4B: Impact of services on safety.		57.3	58.2	59.2	64.2	5.0

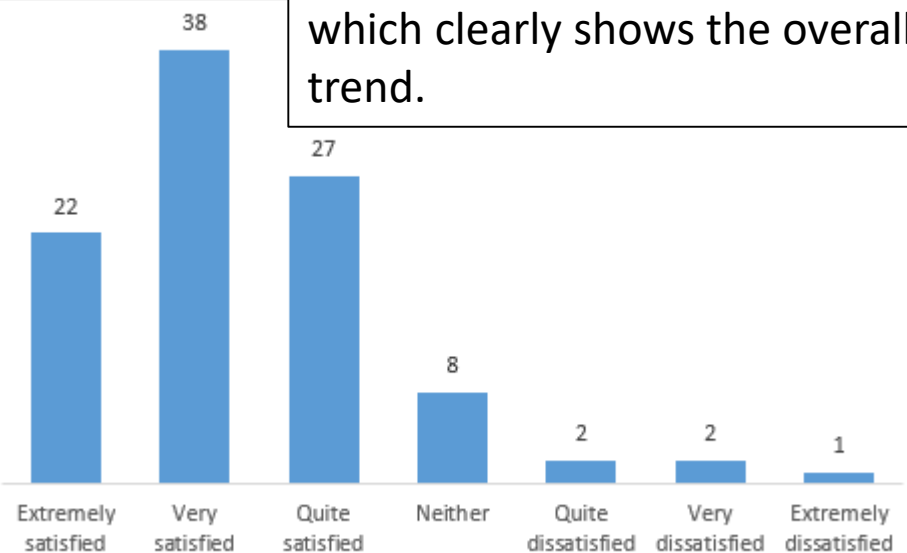
Example

Displaying breakdown of responses to satisfaction question



Pie charts are frequently used to display the breakdown of responses to survey questions. These are very hard – if not impossible – to read.

If reader does want to know this info, use a column chart which clearly shows the overall trend.



You may want to consider whether other information would be more useful (e.g. comparisons of satisfaction ratings by respondent groups)

Tools to support you

MAX toolkit includes guidance on how to avoid common reporting errors, select the most appropriate method of communication and create meaningful tables and charts.

Guide to communicating data using text, tables and charts

Box 5: Chart checklist

- Does each chart have a major message?
 - If so, does the chart communicate the message well?
 - Does the chart communicate anything other than the major message?
 - Is a chart the most appropriate method?
- If describing two values, use text. If describing more values than can easily be shown in a graph, use a table.
- Is the graph easy to read?
 - Is the data in the graph easy to remember?

Adapted from Ehrenberg (1978) and Bigwood and Spore (2003)

Design rules for creating meaningful tables

Figure 1: the key components of a meaningful table

Table Number

Table 1: year-on-year comparisons of ASCOF scores for LAX indicate that service-user reported outcomes are gradually improving ← **Title**

Indicator	2010/11	2011/12	2012/13	2013/14	2014/15	Overall trend	Diff 2013/14-2014/15
(1A) Social Care – related quality of life	18.7	19.2	18.9	19.1	19.4		0.30
(1B) The proportion of people who use services who have control over their daily life	74.3	76.5	74.2	75.4	77.2		1.80
(1C) Proportion of people who use services and carers, who reported that they had as much social contact as they would like				72.3	73.2		0.90
(3A) Overall satisfaction of people who use service with their care and support	62.1	64.5	62.7	63.9	66.1		2.20
(3D) The proportion of people who use services and carers who find it easy to find information about services	57.4	59.2	53.4	55.2	58.9		3.70
(4A) The proportion of people who use services who feel safe	56.4	58.9	62.4	63.7	67.2		3.50
(4B) The proportion of people who use services who say that those services have made them feel safe and secure		57.3	58.2	59.2	64.2		5.00

Row Headings (left side of table)

Column Headings (top of table)

Data (values in table cells)

Further info (line graphs and difference column)

Design rules for creating meaningful charts

	LINE GRAPH	BAR/COLUMN CHART	PIE CHART
DESCRIPTION	Individual points of continuous data are plotted against the horizontal x-axis and are measured against the vertical y-axis. Data points from the same data set are joined by a single line and multiple data sets (max 4 or 5) can be displayed on the same graph.	Data is represented as solid columns or bars and are plotted against one axis and measured against the other. Gaps are used to indicate that data is derived from different categories and the length of the bars or columns are proportional to the size of the category they represent. Usually used for discontinuous data .	Data is represented as a circle and independent elements within it as individual segments – or slices – of varying size. Data is categorical , (nominal or ordinal) and must be exclusive (i.e. belongs to only one category) and based on the same unit of measurement (e.g. percentages).
USED TO DISPLAY	<ul style="list-style-type: none"> • Change(s) over time • Relationship between variables 	<ul style="list-style-type: none"> • Frequency, count or characteristics (e.g. mean) of discrete data categories • Changes over time • Comparisons • Parts of a whole 	<ul style="list-style-type: none"> • Parts of a whole
VARIATIONS	Area line graphs	Histogram; Group or Clustered; Stacked or Component	

Write report(s)

Writing an engaging report that fulfils local info needs and reporting preferences can be challenging when you have not engaged with report-recipients.

Potential solutions:

1. Refer to the **preferred reporting practices** identified by report-recipients involved in earlier activities;

and/or

2. Consider using the **'inverted pyramid' style of report writing**

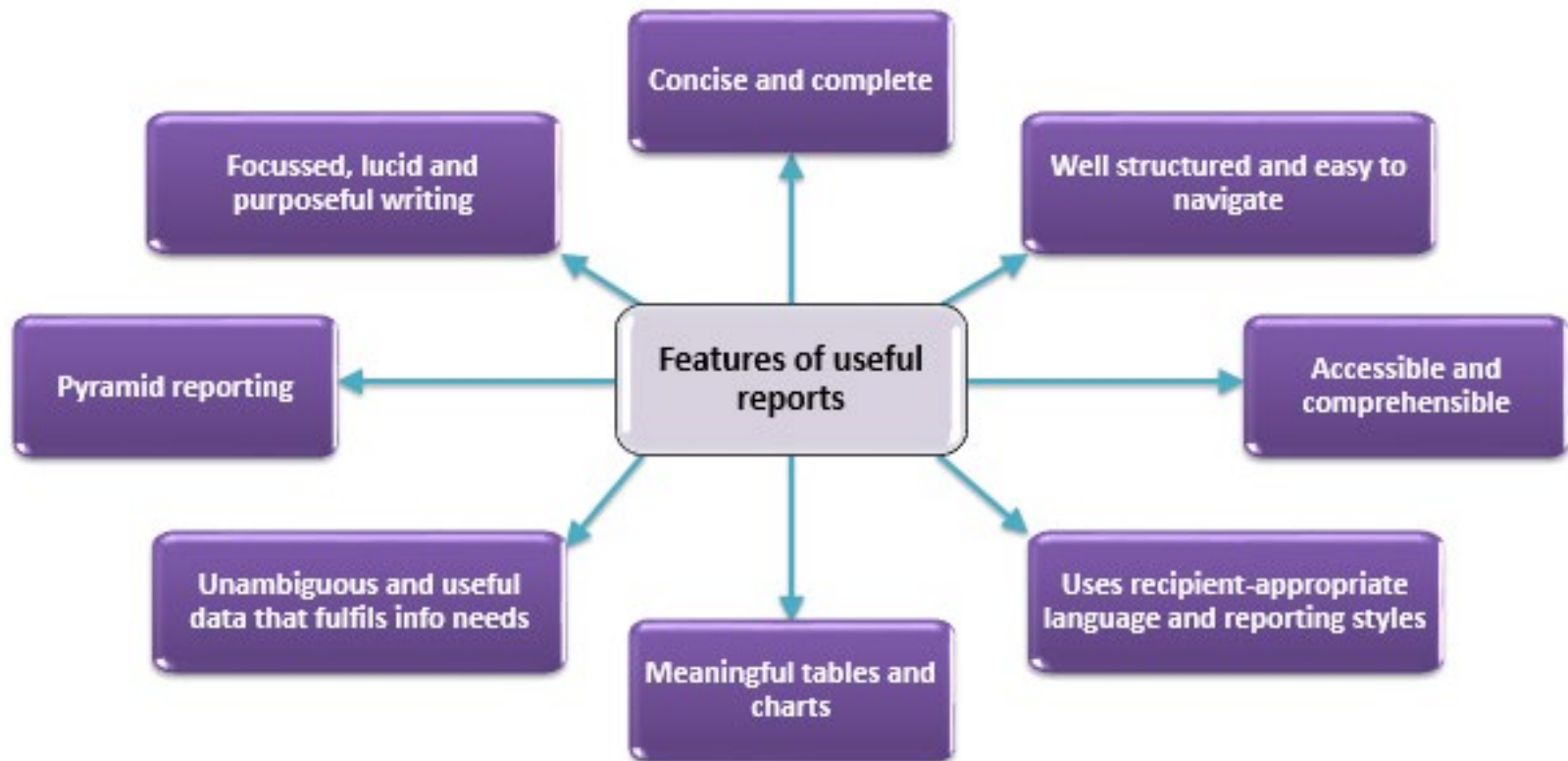
Preferred reporting practices

Report-recipients involved in earlier project activities were clear about the features of 'useful' reports.

Feature	Reports should....
Usable	<ul style="list-style-type: none">• Provide data that can inform decision-making
Concise and focused	<ul style="list-style-type: none">• Be short (max 6 pages)• Focus on what LA decision-makers need to know (e.g. unmet needs)
Accessible and easy to read	<ul style="list-style-type: none">• Start with the headline findings• Include navigational features• Findings should be explained in unambiguous terms• Graphs and charts should be clearly linked to text

Reports should also include **links to further info** and contact details of report-producer (e.g. to request further analysis)

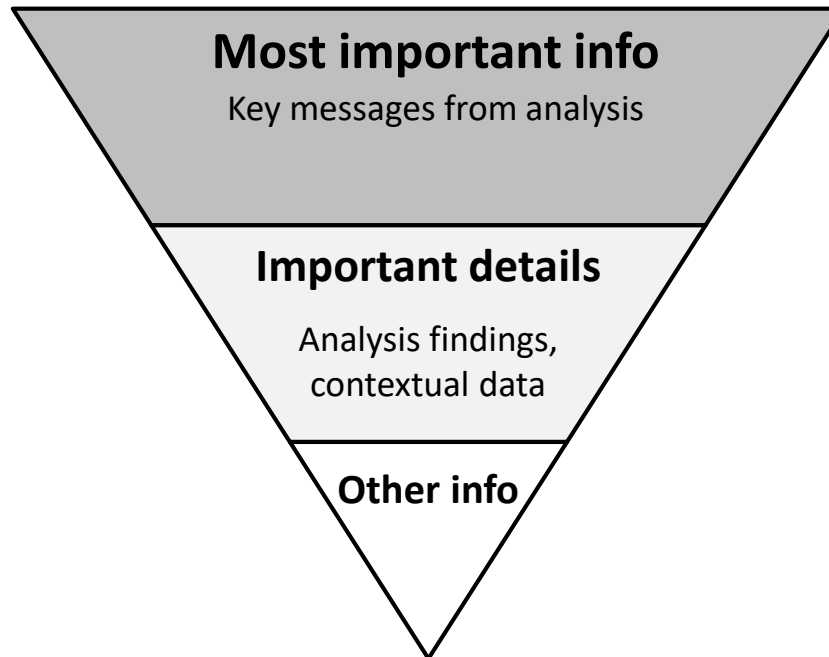
These preferred reporting practices are also discussed and recommended in the wider literature on report-writing.



The reporting element of the MAX toolkit can help you to achieve this.

Inverted pyramid reporting

A reporting strategy favoured by journalists and based on a **summarise first, explain later** approach.



Highly recommended – and preferred – strategy that may encourage LA decision-makers to read the survey report.

The end result

Following these guidelines may help you to produce a report that:

- Fulfils local information needs and reporting preferences,
- Encourages decision-makers to use the analysis findings to inform local performance improvements, and
- Inspires future engagements with you and the survey process.

Such reports may therefore justify the time and resources you devoted to the surveys and make future data collections more useful.

Further info or feedback

To find out more about the MAX project, download the reports on earlier research activities or access the MAX toolkit:

Website: www.maxproject.org.uk

Email: maxproject@kent.ac.uk

Disclaimers

Department of Health and Social Care disclaimer: The MAX toolkit and website are based on independent research commissioned and funded by the NIHR Policy Research Programme (Maximising the value of survey data in adult social care (MAX) project and the MAX toolkit implementation and impact project). The views expressed on the website and in publications are those of the author(s) and not necessarily those of the NHS, the NIHR, the Department of Health and Social Care or its arm's length bodies or other government departments.