MAX TOOLKIT OVERVIEW
The Reporting element

This overview presentation is the fourth in a series of four. We recommend that these overviews are read in order. Please visit the MAX toolkit main page to access the other overview presentations.

Why develop a reporting guide?

Earlier activities and consultations with report recipients (i.e. LA decision-makers such as managers, commissioners) indicated that current survey reports were:

- **Too long** (up to 75 pages)
- Often contained **reporting errors**
- Focused on **descriptives** and **direct ASCOF comparisons**
- Were generally considered **not useful** and therefore not used

> *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]

Report producers (usually analysts) also requested support to produce reports from the MAX team.

Common reporting errors

- **Not highlighting key messages and trends** (i.e. the most important points found in the data)

- **Describing what is already apparent in the tables and charts** (summary points are enough and key trends are more useful)

- **Tables and charts lack key information** (e.g. labels, titles which summarise key trend(s) in data)

- **Data is displayed using an inappropriate method** (e.g. use chart when table is more appropriate)

- '**Chart junk**' (i.e. excessive patterns, lines)

- **Plotting data on incomplete axis** → distorts data so MUST be avoided

The potential value of effective reporting

Concise and focused reports of ASCS and PSS SACE analysis findings can help to:

- **Encourage stakeholders** (esp. potential consumers of survey data, e.g. commissioners) **to engage more** with the surveys

- Inspire potential 'consumers' of survey data to use analysis findings to **inform decision-making and service improvement activities**

- **Limit the replication of analysis** within LAs by enabling 'consumers' to request particular types of analysis, rather than conduct their own.

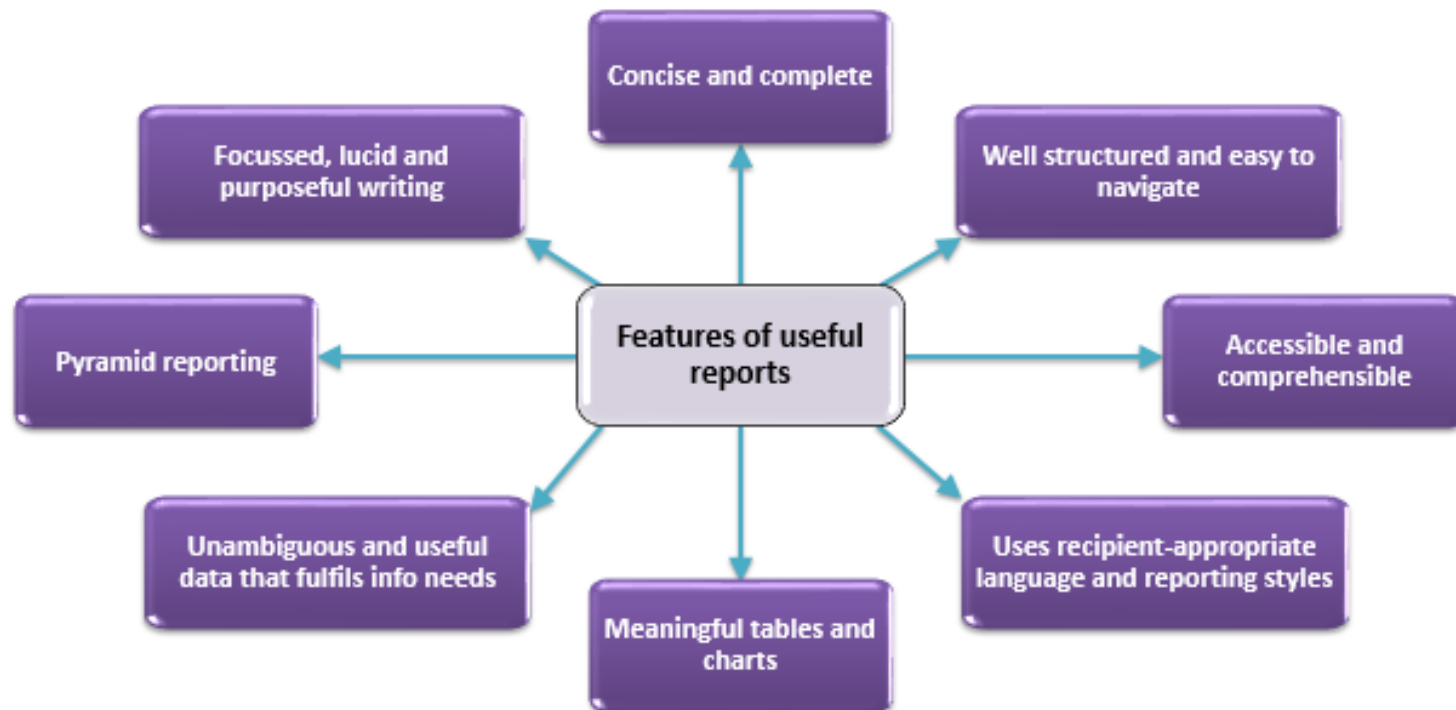**Getting your survey reports right is therefore vital!**

The reporting element of the MAX toolkit
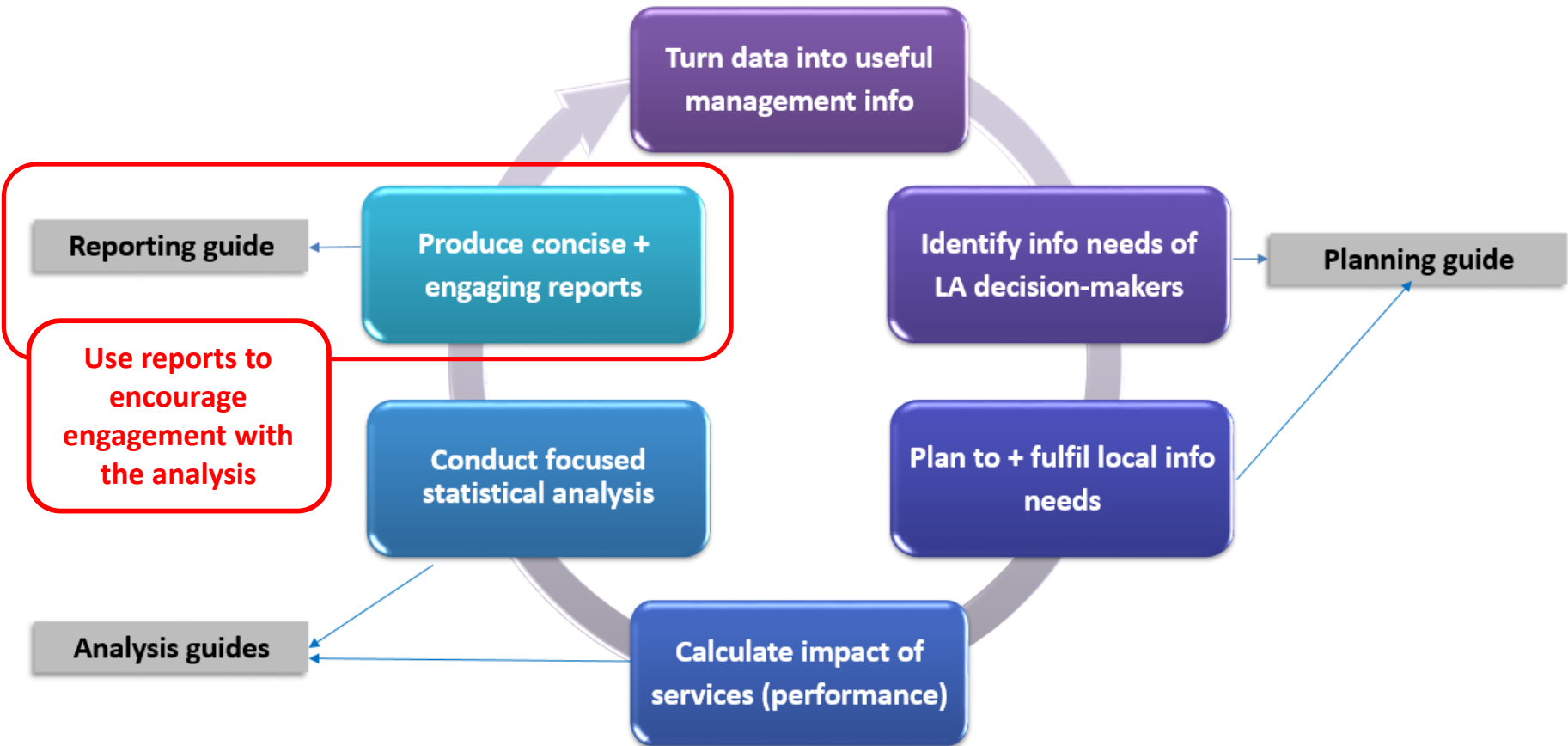
Contains the **MAX REPORTING GUIDE** and the **SUPPLEMENTARY REPORTING GUIDE**.

Getting started with reporting

The **key features of a useful report** were identified by report-recipients during earlier project activities and are also discussed in the wider literature on report-writing.

Concise and complete

Well structured and easy to navigate

Focussed, lucid and purposeful writing

Features of useful reports

Pyramid reporting

Accessible and comprehensible

Unambiguous and useful data that fulfils info needs

Uses recipient-appropriate language and reporting styles

Meaningful tables and charts

The MAX reporting guides

The **MAX REPORTING GUIDE** provides an overview of the key steps to producing a concise and useful report of ASCS & PSS SACE analysis findings:
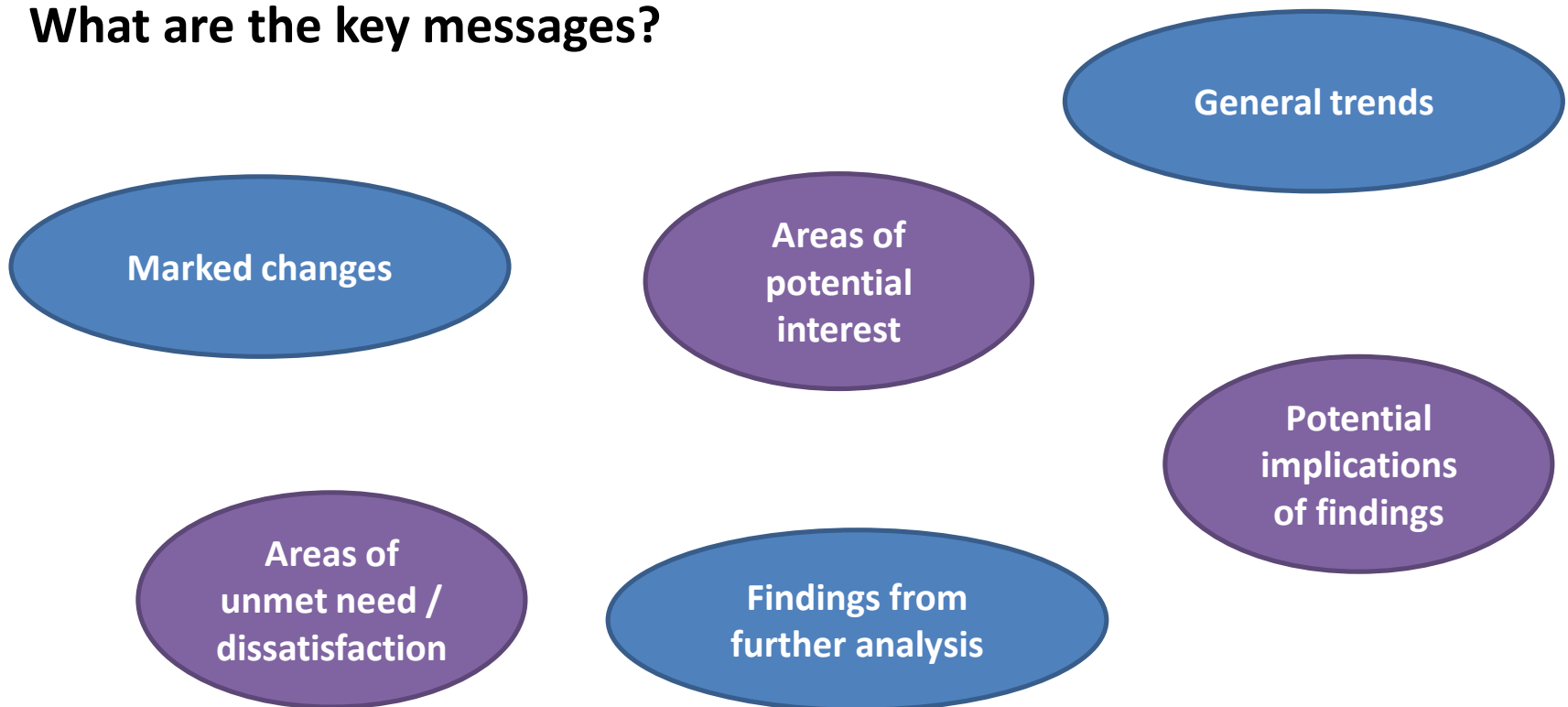
1. Determine **key messages** from analysis;

2. Establish **most appropriate method of communication**; and

3. **Write report.**

SUPPLEMENTARY REPORTING GUIDE consolidates recommended report-writing + data visualisation strategies, and may therefore be useful to even experienced report-producers.

Determining the key messages will help you to ensure your **report is focused and clear**, and will also ensure that your final report is concise.

What are the key messages?

General trends

Marked changes

Areas of potential interest

Potential implications of findings

Areas of unmet need / dissatisfaction

Findings from further analysis

STEP 2: ESTABLISH MOST APPROPRIATE METHOD OF COMMUNICATION

Selecting the most appropriate method can be challenging and is one of the **most common reporting errors**.

Method	When to use
Text	• Describing two values • Summarising patterns in larger dataset (e.g. data displayed in tables and charts)
Table	• Describing three or more values and/or multiple units • Communicating the **quantitative aspects** of the data • Readers need to know the numbers
Chart	• Describing three of 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
1I: 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 safey.		57.3	58.2	59.2	64.2	5.0

Example

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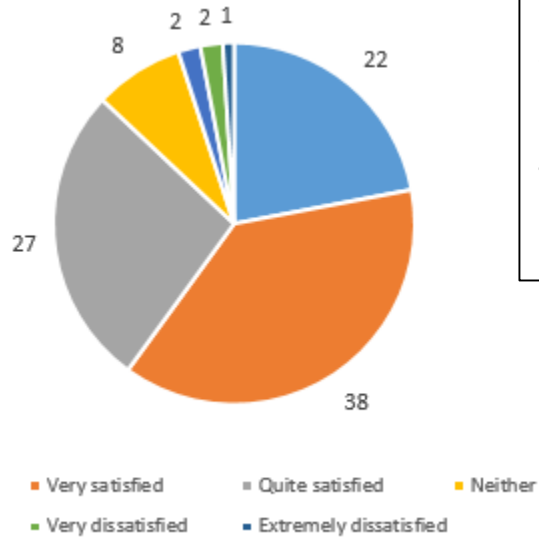
Pie charts are frequently used to display the breakdown of responses to survey questions. These are very hard – if not impossible – to read.

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)
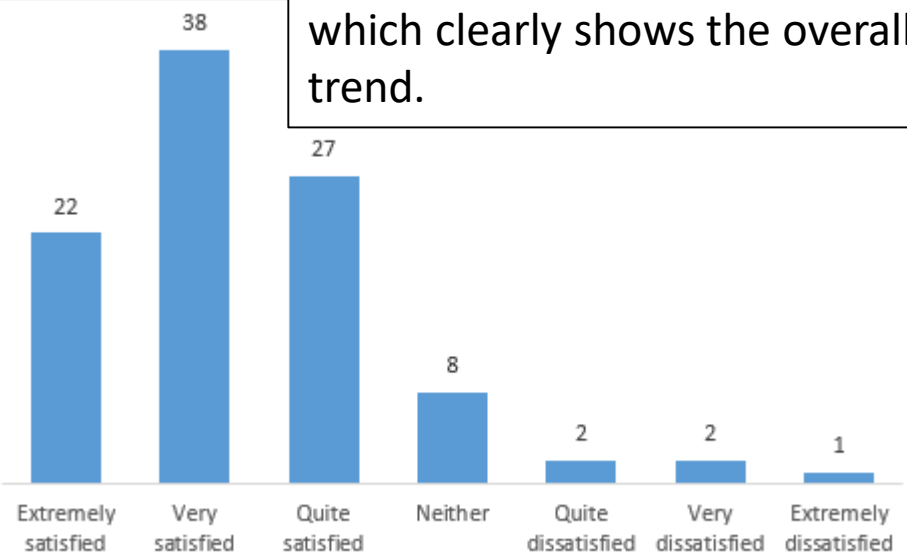
STEP 3: WRITE REPORT

Writing an engaging report that fulfils local info needs and reporting preferences can be difficult, particularly 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**

Both solutions are summarised in the **MAX REPORTING GUIDE**.
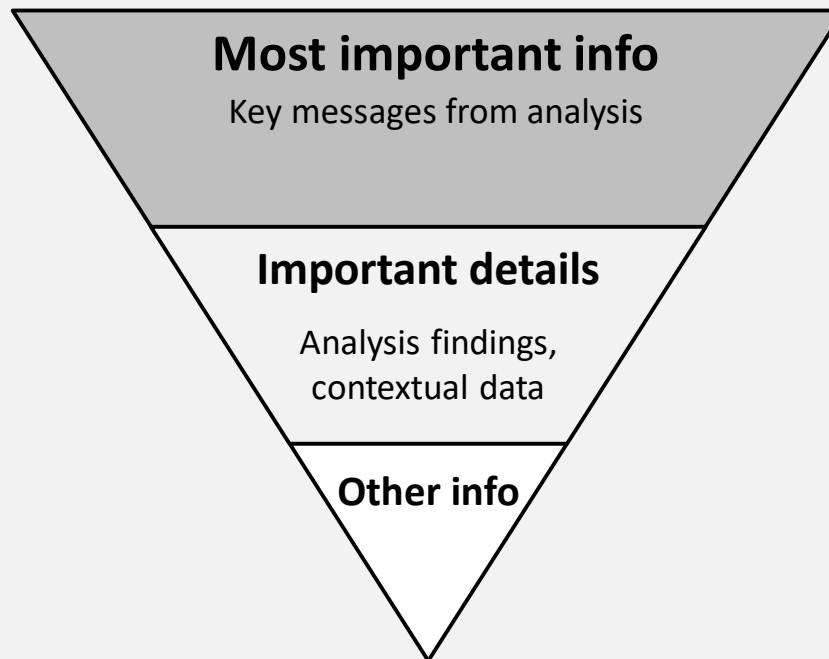
Preferred reporting practices

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

Feature	Reports should….
Usable	• Provide **data that can inform decision-making**
Concise and focused	• Be **short** (max 6 pages) • Focus on what LA decision-makers **need to know** (e.g. unmet needs)
Accessible and easy to read	• 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)

Inverted pyramid reporting

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

Most important info
Key messages from analysis

Important details

Analysis findings,
contextual data

Other info

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

Navigating the MAX toolkit

The guides can be accessed via the main toolkit page. The individual tools can be accessed via the guides or the downloads page.

HOW TO USE THE MAX TOOLKIT

The MAX toolkit contains a range of guides, tools and training resources, and is structured around the three stages of the survey process: **planning, analysis and interpretation**, and **reporting**. Links to the relevant elements are provided in the guides detailed below or on the downloads page. An overview of the MAX toolkit can also be accessed here.

Please note that the guides in the MAX toolkit should be read alongside the guidance provided by NHS Digital and are currently in draft form. You will be notified of any updates by email.

1. PLANNING THE KEY STAGES OF THE SURVEY PROCESS

Planning the key stages of the survey process can help you to transform the ASCS & PSS SACE into a large piece of local research.

The **MAX PLANNING GUIDE** summarises a range of strategies that you can use to identify and fulfil the information needs of the decision-makers and practitioners within your organisation using survey data and other existing resources.

Further information about the planning element of the MAX toolkit can be found in the MAX planning overview and the importance of planning and stakeholder engagement webinar presentation.

2. CONDUCTING FOCUSED EXPLORATORY & FURTHER ANALYSIS

Focused analysis can help you to translate ASCS & PSS SACE data into meaningful results that can guide local service and performance improvement activities.

Overview of the MAX toolkit elements

Further information about the three main elements of the MAX toolkit have been developed and are included in the MAX toolkit:

- Planning overview
- Analysis and interpretation overview
- Reporting overview

Pre-recorded presentations focusing on individual analysis tools, conducting further analysis and measuring impact are also provide.

Further Information

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

Disclaimer

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