Thriving Queensland Kids Partnership
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Gladstone Region Together

Data Toolkit User Guide

Designed to help grow organisation capacity, knowledge and skills in using data for improved service delivery and client outcomes.

Data Toolkit User Guide

The Data Toolkit is designed for place-based initiatives partnering with Human Service organisations to help grow organisation capacity, knowledge and skills in using data for improved service delivery and client outcomes. The Data Toolkit User Guide provides step by step processes and templates to support development of bespoke data collection systems to translate data findings into impactful change action.

The Data Toolkit supports place-based initiatives to navigate the development of data capacity partnerships with Human Service organisations, from developing partnership objectives and data sharing agreements, to guiding the development of tailormade data capture tools and processes to assess data findings and enable evidence informed decision-making.

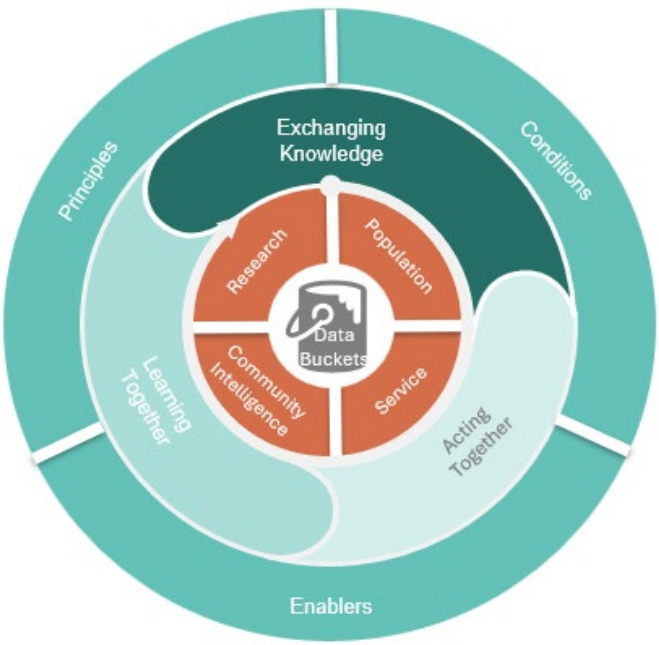
While the Toolkit is designed for place-based initiatives to partner and support Human Service organisations, it may also be used directly by Human Service practitioners and organisations for self-guided development of inhouse data collection systems and practices.

Background

The collection and use of data by place-based initiatives can open up opportunities for shared decision-making. The Place-Based Data Framework was co-designed by place-based leaders and data experts, with support from Thriving Queensland Kids Partnership, to create a framework to guide practitioners in place on building a shared understanding of the 'how to' of accessing, collecting, and using data for the purpose of shared measurement and shared decision-making.

The framework outlines the six interconnected components and four data types or 'buckets' of data.

Place-Based Data Framework



Population
Sources include state and federal government, open and closed data assets. Di-identified and available at different geographical locations.

Community
Collected by conversations, surveys, social media, usually qualitative in nature. May include local wisdom, lived experience, ideas and innovations contributed by community members in place.

Service
Collected by organisations or funders during the service delivery process. Could include inputs (resources and funding), outputs (quantity, quality), need (vacancies, participation) and performance.

Reserach
Collected, observed, generated or created to validate research findings, evidence-based practices or strategies. Usually held by universities, research institutes- including within policy and strategy.

The data buckets reflect the data ecology in which place-based initiatives operate – from the 'macro' world of population data as a broader context for problems and measuring population change over time, through the mid-level of research data, to the 'micro' of service and community data where the problems are experienced at the local level.

This Toolkit was developed to support the collection, use and sharing of the service data bucket.

Learnings drawn from data capacity building partnerships with local Gladstone Human Service organisations were used to develop the Toolkit. Gladstone Region engaging in action Together (GRT) partnered with these organisations, each at different stages of their data capacity journey, to develop bespoke tools and systems.

GRT worked with data partners in the co-design of data collection tools, practice development of data, categorisation of data, data cleansing, graphing and reporting of data. During development and on completion, these 'sets' of tools were then compared for commonalities to develop a suite of universal tools and templates that could be utilised and tailored to the specific needs of individual organisations.

This Toolkit was designed with usability and functionality in mind, in the context of a busy operational client-focused environment, while conducting other primary service delivery functions, with an aim of *the simpler the better*.

Contents

Appendices

The Data Toolkit includes a series of tools aimed at supporting grow data capacity. The tools include:

- planning tools to support step by step planning,
- templates that can be tailored to form bespoke tools suited to the needs of individual organisations,
- examples of data collections, graphing and reports based on fictional organisations and clients to demonstrate to users how the tools, templates and processes might be used in practical application, and
- a considerations checklist to prompt inclusions of key considerations at each planning stage and help ensure that risks are managed and efficiencies and optimisations are made where possible.

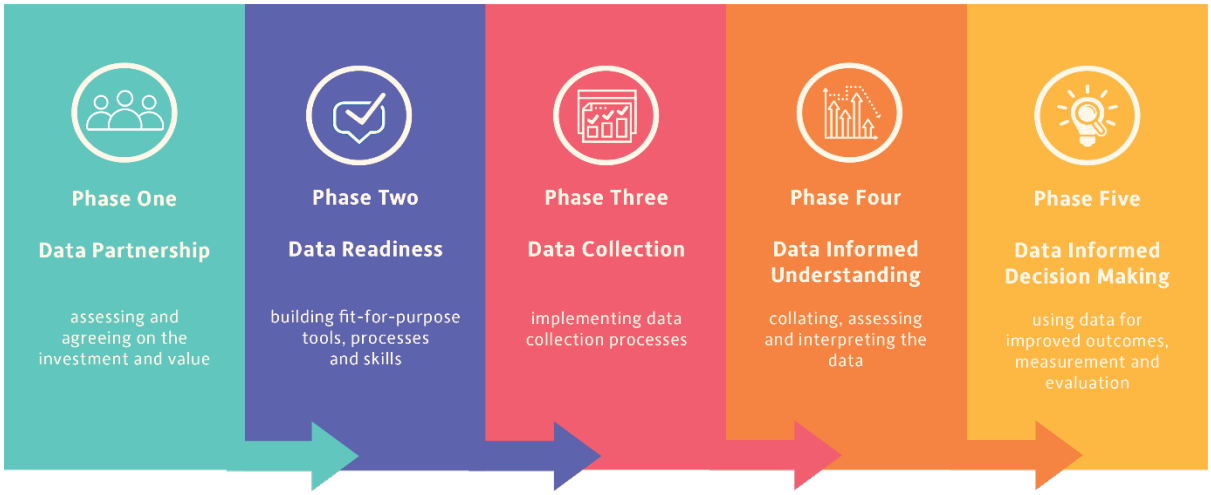
Each tool and template is explained at the appropriate phase of the data capacity partnership and development project as outlined in this Data Toolkit User Guide.

Appendices 1-4 and 9-11 provided in print format or may be edited using Adobe Acrobat.
Appendices 5-8 provided in a downloadable Excel format.

Click on each appendix to navigate to the page.

Data Capacity Partnership Process Map

The process of partnering for data capacity development is outlined in a series of 5 phases. The following identifies each phase and the associated tool in this toolkit for use at that phase.



5 Phase Overview

Phase 1: Data Capacity Partnership

This initial phase focuses on laying a strong foundation for partnership, aimed at growing data capacity. This phase includes developing a Data Capacity Building Project Planning Tool, which will support how the data will be collected and reported and clearly define roles, responsibilities and expectations. If two organisations plan to share data, this is the appropriate time to draft and formalise a Data Sharing Agreement. This agreement should address legal, ethical and operational considerations, such as data ownership, privacy and compliance with relevant regulations.

Tools and Templates to help:

- *Data Capacity Building Project Planning Tool*
- *Considerations Checklist*
- *Data Sharing Agreement Template*

Phase 2: Data Readiness

Once a shared understanding and framework for data use has been established, phase 2 can commence in preparing the partnering organisation for effective data collection. This involves ensuring that data team members and partners have a shared understanding of data terminology being used and developing the necessary collection tools to ensure that data is relevant to organisation goals. Activities include tailoring bespoke data collection tools, training team members in data literacy, and designing processes that ensure the relevance, quality and integrity of the data collected. The goal of this phase is to ensure that the organisation or partnership is ready to collect and manage data in a way that aligns with both operational needs and ethical standards.

Tools and Templates to help:

- *Data Terminology 101 Factsheet*
- *Client Journey and Outcome Tracking Worksheet Template*
- *Client Journey and Outcome Tracking Worksheet Example*
- *Service Referral Tracking Template*
- *Service Referral Tracking Example*

Phase 3: Data Collection

In this phase, the data collection tools designed during phase 2 are implemented. Monitoring data quality for accuracy and consistency throughout this phase, can help to refine data collection and data entry practices for improved data use and reliability.

Phase 4: Data Informed Understanding

Once data is collected, it can be organised to allow meaningful insights to be drawn. This phase focuses on transforming raw data into knowledge that can inform decision making.
A key component of this phase is visualising (graphing and representing) and reporting the collected data in ways that are clear and tailored to the objectives, audience and use. This includes creating graphs and report summaries to highlight key trends, outliers and correlations. Effective data visualisation makes complex data easier to understand and helps uncover insights that may not be immediately visible in raw data tables.
Tools and Templates to help:

- *Data Report Example*

Phase 5: Data Informed Decision Making

The final phase focuses on transforming insights into action. Data is used as evidence to support decisions in areas such as service design and delivery practice, program improvement, organisational development, and strategic planning. This may include using data evidence to allocate resources more effectively or advocate for policy changes. This phase supports continuous learning by embedding mechanisms that offer feedback loops for data informed decision making and tangible measurable improvements and impact.
Tools and Templates to help:

- *Improvement Identification Tool*
- *Improvement Project Planning Template*

Phase 1: Data Capacity Partnership

A place-based initiative working in partnership with a Human Service organisation with a shared objective to grow data capacity, may provide a range of supports as a partner in the process. This may include supporting data understanding and training, design of collection tools, identifying insights through data visualisation and reporting, seeking to understand trends, offering correlating population data to contextulaise local service data within a local geographic context, through to support of improvement projects.

Identifying the extent of the partnership is best done by planning a data capacity building project together from purpose and process, to end goals and use of the data for informed decision making. Partnering in the initial planning phase together can help identify where skills and resourcing capacities are across partners, to clearly identify roles and responsibilities of each partner in the project.

Data Planning

A Data Capacity Building Project Plan can be used to guide the process of planning out the data capacity building project, defining the purpose for collecting data, what data is needed, how it will be collected, who is responsible for data collection activities, and how often activities will be completed. A Data Capacity Building Project Planning Tool is provided to help guide this process. To support inclusions of all key considerations in forming the data partnership and planning the data capacity building project, please also refer to the Considerations Checklist. This tool can be used again and again throughout the development phases to support comprehensive planning.

Appendix 1: Data Capacity Building Project Planning Tool

Appendix 2: Considerations Checklist

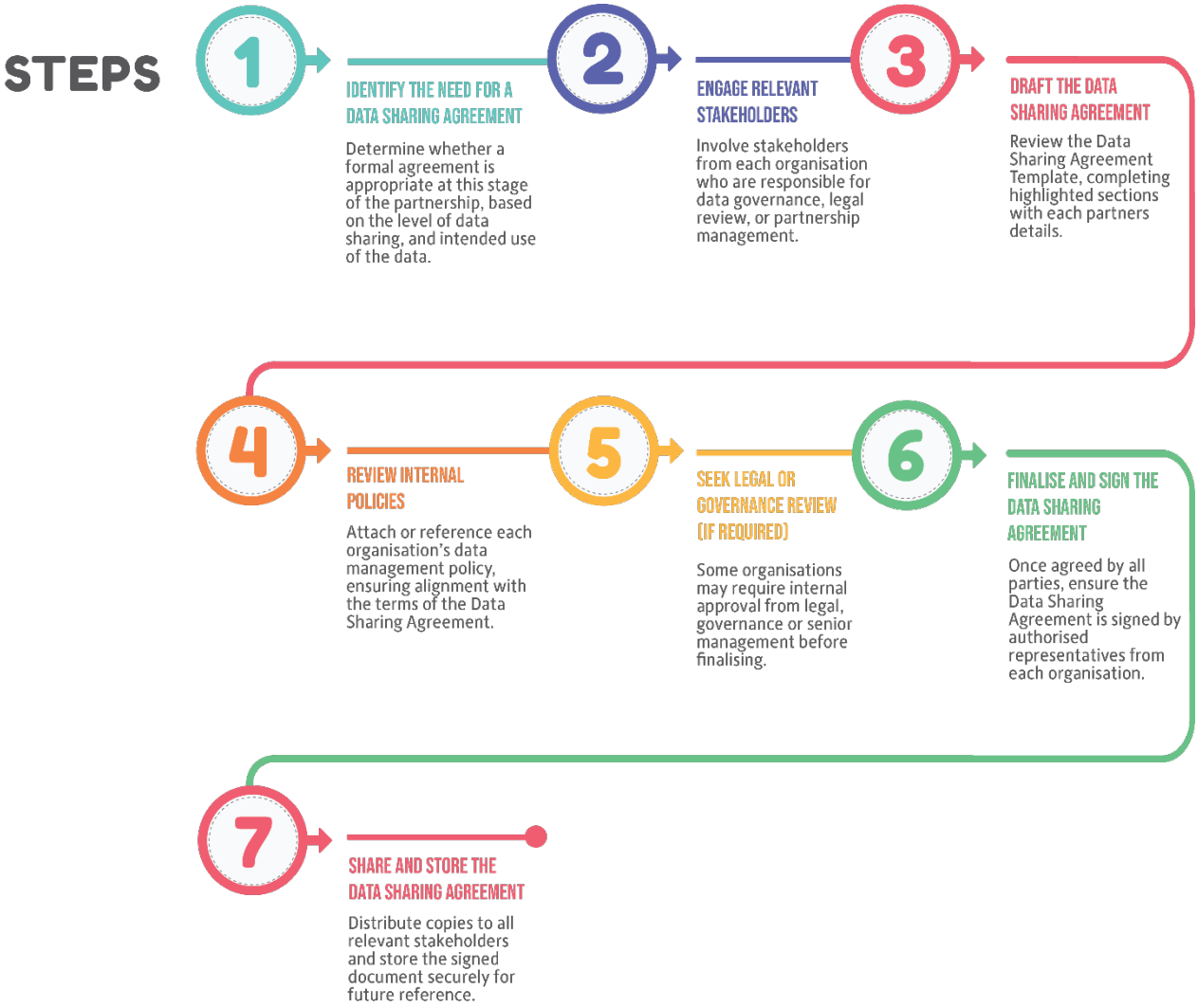
Tips

- *Well thought-out data collection planning ensures that data collection is intentional and designed to produce actionable outcomes. Reflecting on this data collection plan during the data collection process, will help to ensure that the right data is being collected, in the right way, to meet the purpose.*

Data Sharing

Place-based initiatives planning to partner with a Human Service organisation to grow capacity in data use, where data will be shared for this purpose, should consider entering into a data-sharing agreement. Data Sharing Agreements outline the terms of the partnership, including roles, responsibilities and intended uses of shared data. An agreement may also include data management policies and procedures, covering aspects such as data storage, access controls, privacy, consent and security.

Appendix 3: Data Sharing Agreement Template



Tips

- *Consider whether sharing client data is necessary to enable the outcomes of the partnership. To minimise confidentiality risks, data provided by the partnering organisation to the place-based initiative should be deidentified eg remove client names and any other identifying information.*

Phase 2: Data Readiness

In preparation for collecting and using data effectively, early engagement of practitioners that will likely be involved in data activities, can help to grow confidence and readiness. Including practitioner insights in the data readiness phase can help contextualise the collection of data in day-to-day practice and use of data in achieving operational goals, and can support the later embedding of data practices into business as usual operations for sustained outcomes.

Collaborative workshops can be held to review existing service or program guidelines, map existing data sources and resources, and develop data collection tools together. This provides an opportunity to build shared data understanding, foster ownership, and ensure practical insights from day-to-day practice are considered. A common language can be developed around data concepts, and future workshops or check-ins can be planned to refine workflows, address useability issues and support continuous learning.

Data Capacity and Language

In this phase, it is helpful to ensure that those that will be working with data, from collection to analysis, have the appropriate training or information available to them. Levels of data literacy may vary between team members and partners. Setting up a clear understanding upfront of data terms and definitions that will be used can help create a shared data language.

Some programs that require reporting may have their own data resources such as data definitions and counting rules. Exploring if these exist before developing data collection tools can help to maintain consistency across data use. Understanding the expectation of funding partners for data use and reporting is a good place to start, and can often be achieved by checking funding agreements and contracts, and program specifications and guidelines.

The Data Terminology 101 factsheet provides commonly used data terms and definitions, as a starting point for clear, consistent communication about data and its applied use.
Appendix 4: Data Terminology 101 Factsheet

Tips

- *Common statistical terms and concepts - The Australian Bureau of Statistics (ABS)*

Developing Data Collection Tools

Fit-for-purpose data collection tools can be developed from scratch with the appropriate data collection software or experience in building data collection tools. Microsoft Excel or similar platforms provide appropriate data collection and visualisation options for a range of data collection purposes.

This toolkit offers two different data collection tool templates, to help guide the development of bespoke data collection tools, using commonalities between human service programs. Each of the two templates has a specific purpose and is suited to a different service type:

- The Client Journey and Outcome Tracking Worksheet Template is suited to Human Service organisations that provide case management or direct supports, it is designed to collect data throughout a client's supported journey.
- The Service Referral Tracking Worksheet Template is suited to services that offer referral or navigation support, it is designed to track individual referral interactions and referral outcomes.

Appendix 5: Client Journey and Outcome Tracking Worksheet Template
Appendix 6: Service Referral Tracking Template

The Data Collection tool templates include a data collection worksheet and worksheets preloaded to graph data across specific data categories, using data inputted in the collection worksheet.

The Data Collection worksheet includes predetermined drop-down list options for each data category, aligned to commonly used groupings of data (eg as grouped by ABS).

Aligning with commonly used groupings of data that are used more widely, can aid later correlations of internal (service) data and external (population) data eg collecting demographic data such as client age using the same age brackets used by ABS.

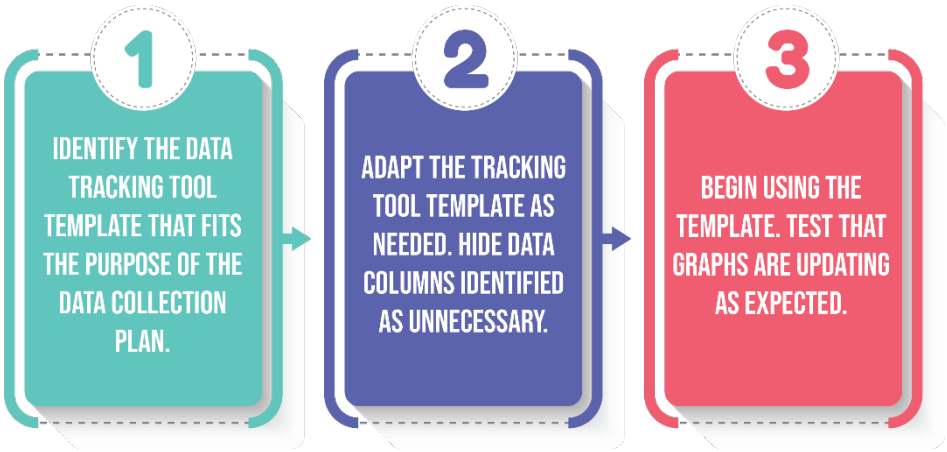
The templates are preloaded with graphing across other worksheets that draw from the Data Collection worksheet to auto-populate graphs with data entered (see Phase 4 for visualisation of data and use of graphs in reporting).

Tailoring Data Collection Tool Templates

Some pre-loaded data categories included in the templates may be more relevant than others to each individual organisation. Refer to the completed Data Capacity Building Project Plan to identify what data will be collected and **Hide** data columns identified as unnecessary at this stage of the data collection work.

Hiding columns rather than deleting them, will preserve graph automations on other worksheets. To hide columns identified as not needed, right-click the column tab and select **Hide**. To unhide, right-click near the hidden column and select **Unhide**.

Using Tracking Tool Templates



Predefined data option lists are provided within the List tab of the tool. The 'Other- add to list' option prompts the user to update the list by adding a new option.

Tips

- *Hide or show rows or columns - Microsoft Support*
- *Create a drop-down list - Microsoft Support*
- *As data collection and analysis practices evolve over time, preserved hidden columns included in the template, may be unhidden to expand on data collected. Consider including data that is already being collected in the data collection tool, even if it is not considered necessary in the early stages of data use. It might serve a purpose later and will save time retrospectively entering old data.*
- *Consider if and how the Data Tracking Tool will be shared by more than one data collector. Decide where the file will be stored, who needs access, and how updates will be managed. Using a shared, cloud-based platform can support version control, automatic updates and real-time collaboration.*
- *This is a good time to revisit the Considerations Checklist to ensure that considerations such as confidentiality have been fully considered, for example, is there any requirement to seek informed consent from clients to share their data, or is the data suitably deidentified to not pose a confidentiality risk.*

Example Data Collection Tools

To further assist in understanding how each of the templates might be used, the Toolkit also includes completed examples of each data collection template.

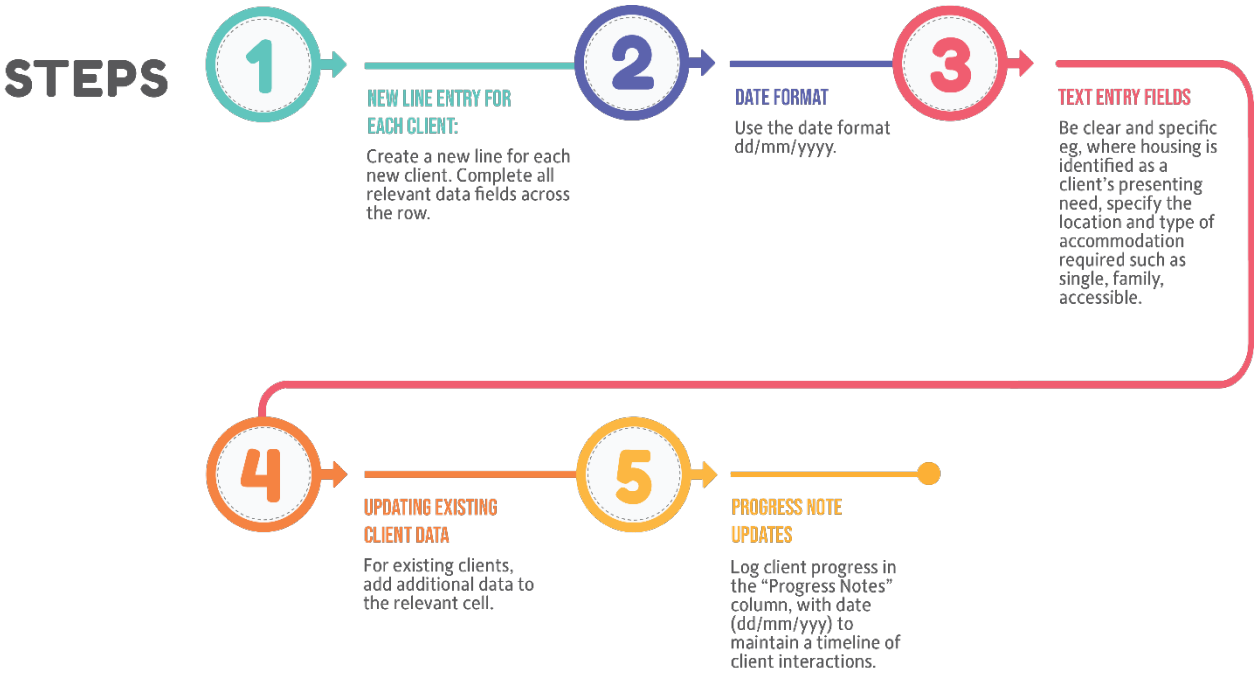
These are populated with fictional data to simulate actual use, as a practical demonstration of the appropriate type and consistency of data and amount of detail to include. The examples show how entering data into the Data Collection worksheets automatically generates graphs, in the additional worksheets, using pre-loaded formulas. The examples can be used to help understand how to visualise raw data to support identify trends and outliers.

Appendix 7: Client Journey and Outcome Tracking Worksheet Example
Appendix 8: Service Referral Tracking Example

Phase 3: Data Collection

Collecting the Data

Data collection can include both quantitative and qualitative data to identify trends and key insights into service delivery effectiveness and efficiency. A well-stepped out process with practical guides supports accurate and reliable data collection.



Tips

- *Enter data as soon as possible for maximum recall.*
- *When a client re-engages begin a new line entry.*
- *Keyboard shortcut Alt+Enter allows new lines to be entered (eg line down) in a single cell.*

Monitoring Data Quality

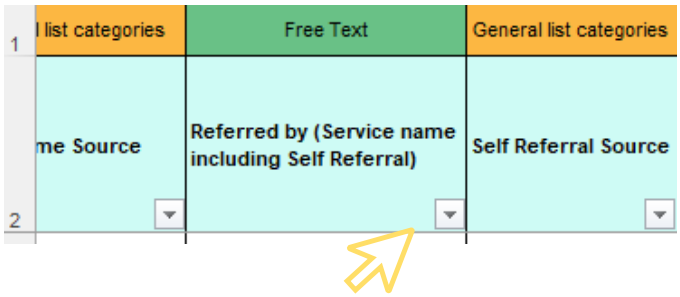
Monitoring data quality for accuracy and consistency, can help to refine practices and reliability of the data over time.

Schedule regular quality assurance checks ahead of data analysis and reporting. This includes checking if data fields are complete and consistent. As an example, dates entered in different

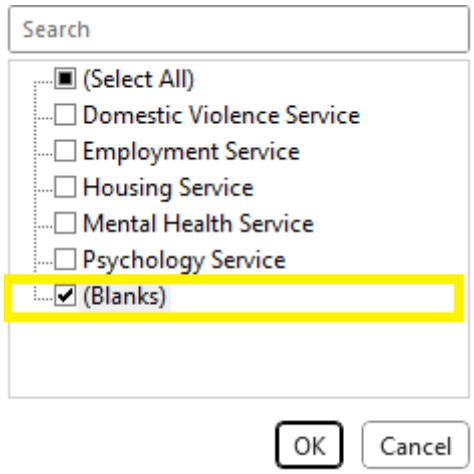
formats may impact filters for specific date ranges. Aligning dates to all appear in the same format (dd/mm/yyyy) helps to sort and filter data into reporting periods.

Data completeness and consistency can be checked by using the filter function, to review each column and check for blank or duplicate entries (which may result from spelling errors). The following steps outline how.

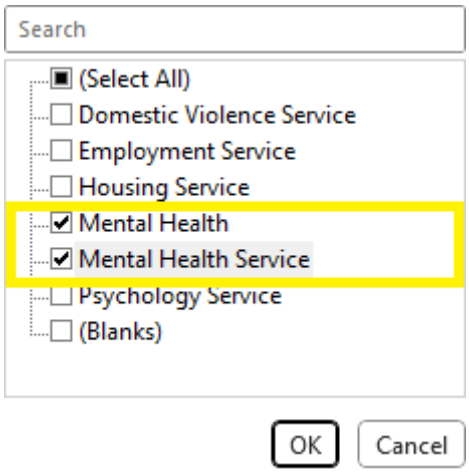
1. *Click the drop-down arrow on the column header to filter drop box to appear.*



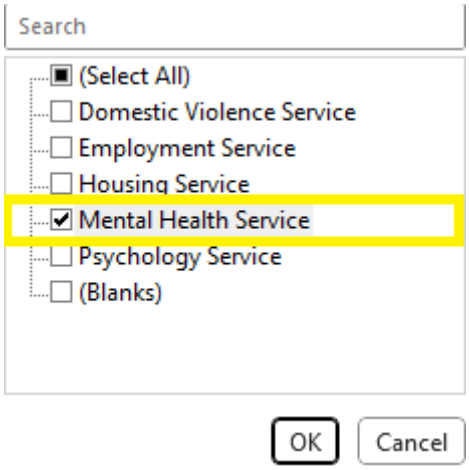
2. *Unselect (Select All), then select (Blanks) to review blank cells to review and fill in missing content where possible.*



3. *Review list for inconsistent naming or spelling errors that may cause unnecessary duplicate categories eg, Mental Health and Mental Health Service*



4. *Apply adjustments and review list to check duplicate categories are resolved.*



Phase 4: Data Informed Understanding

Visualising Data

Data visualisation is the practice of representing data in a visual format, such as charts and graphs, to make it easier to understand trends and outliers within the data. Visualisation helps translate complex datasets to enable identification of trends and helps communicate data insights.

The Client Journey and Outcome Tracking Worksheet and Service Referral Tracking Templates include automated worksheets that convert raw data entered in the Data Collection worksheet into graphs. The graphs are interactive with filters that can be applied to adjust data view by time and client demographics.

Where data insights can be offered by observing both the reporting period and historical data, two graphs might be used to represent the same data:

1. Snapshot – eg data for the immediate reporting period (eg week, month, quarter) using pie chart or bar graph to show occurrences in that time period.
2. Time Series – eg comparison of current data with previous data using a bar graph to show changes over time (eg by week, month, quarter, year, or other relevant intervals).

Tips

- Create a chart from start to finish - Microsoft Support

Reporting Data Insights

Written reports to present data insights can be used to share observations and findings from the data, offering insights into 'what' the data is saying. The aim of reporting is to present data findings clearly, accurately and objectively, supporting shared understanding without overstating conclusions or assumptions. Unless there is substantial evidence to support conclusions, stating 'why' something has occurred, may not be an appropriate inclusion in the report, and may require further exploration. Identifying causal factors is covered at Phase 5.

To aid the flow of the report and make it easier for the reader to navigate, each topic can be presented by topic heading eg Client Age, Client Location, Client Cultural Background. Accompanying each graph, with brief findings (one to two sentences).

Before report writing:

- revisit the purpose outlined in the Data Capacity Building Project Plan
- consider the audience and purpose of the report.

An example written report is provided in this toolkit to demonstrate how reporting can present visualised data and state findings in an impartial writing style.
Appendix 9: Data Report Example

Report Writing and Reviewing Guidelines

- Include a brief introduction that outlines data collection purpose and parameters and the period the data represents
- Keep reporting impartial, report observations versus conclusions.
- Avoid introducing opinions, solutions, or assessment.
- Consider context in perspective of the audience the report is intended for.
- Use language that aligns with the organisation, program or service.
- Be inclusive and avoid commentary that could be perceived as divisive.
- Use plain language and terminology suited to the audience and level of data literacy.
- Avoid unnecessary filler words such as *any*, *also*, *therefore*.
- Include a clear, descriptive title for each graph to support reader orientation.
- Use page breaks and topic headings to organise the report into themed sections.
- Include limitations identified by the organisation.
- Include assumptions made in presenting the data or drawing insights.
- Note data sources including where data is generated by the organisation (eg practitioner observation of client outcome), or directly from clients (eg client feedback survey).
- If data or content from external sources are used, ensure they are cited and consider including a Reference List at end of report.

Tips

- *Use spell check on all text including graph titles and legends.*
- *When inserting graphs into the written report, copy and paste as a picture.*
- *Where there is only one data point for the reporting period consider data sensitivity to protect client information being identifiable.*

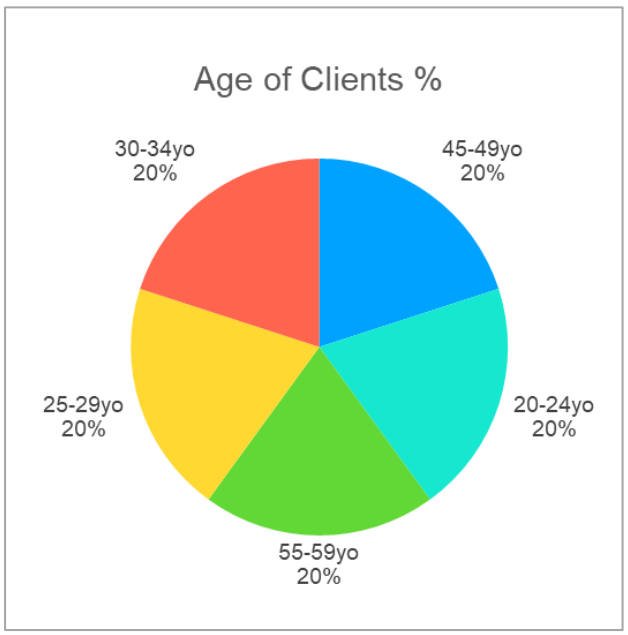
Types of Graphs and Charts

Pie Charts

A pie chart is used to show percentages of a whole and represent percentages at a set point in time. Unlike bar graphs and line graphs, pie charts do not show changes over time. Use pie charts to demonstrate percentages at a snapshot in time eg age groups of clients presenting during a specific time period.

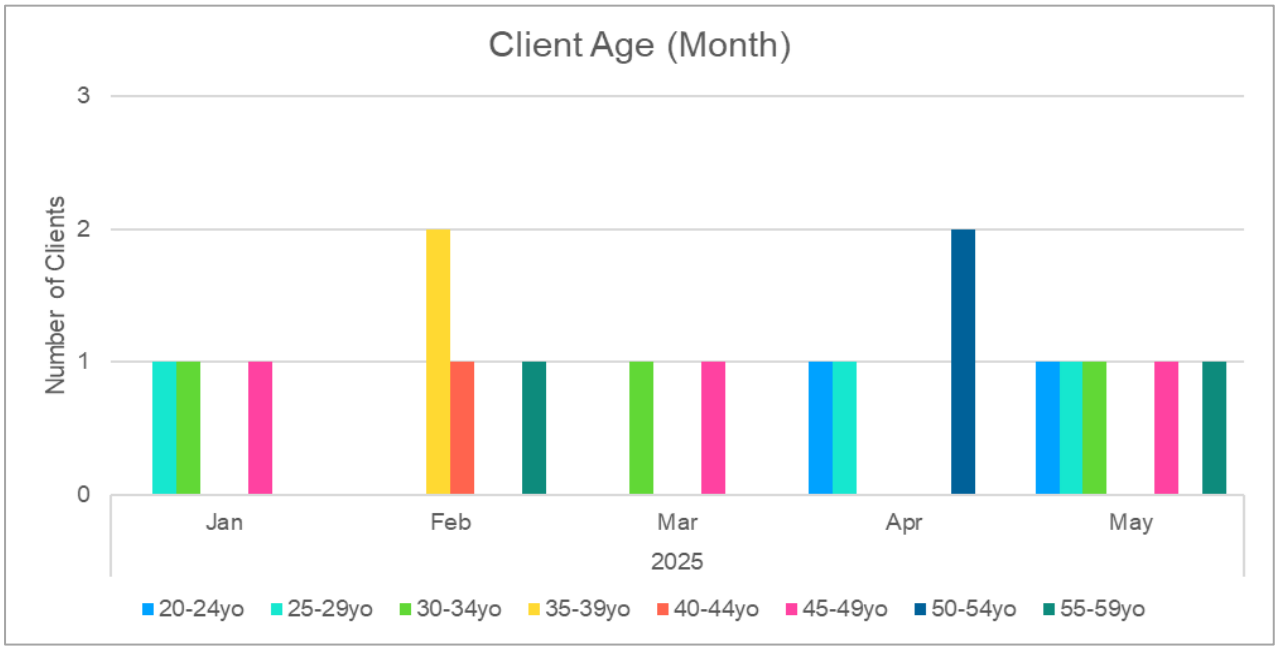
For pie charts, order categories from largest to smallest for presentation, except where categories have a natural continuous order such as age groups.

Exclude labels that represent 0%, except where continuous categories exist eg age groups where it is beneficial to show all age groups, or where there has been continuous representation over time, to highlight the change eg no referral during a specific period from a regular referring agency.



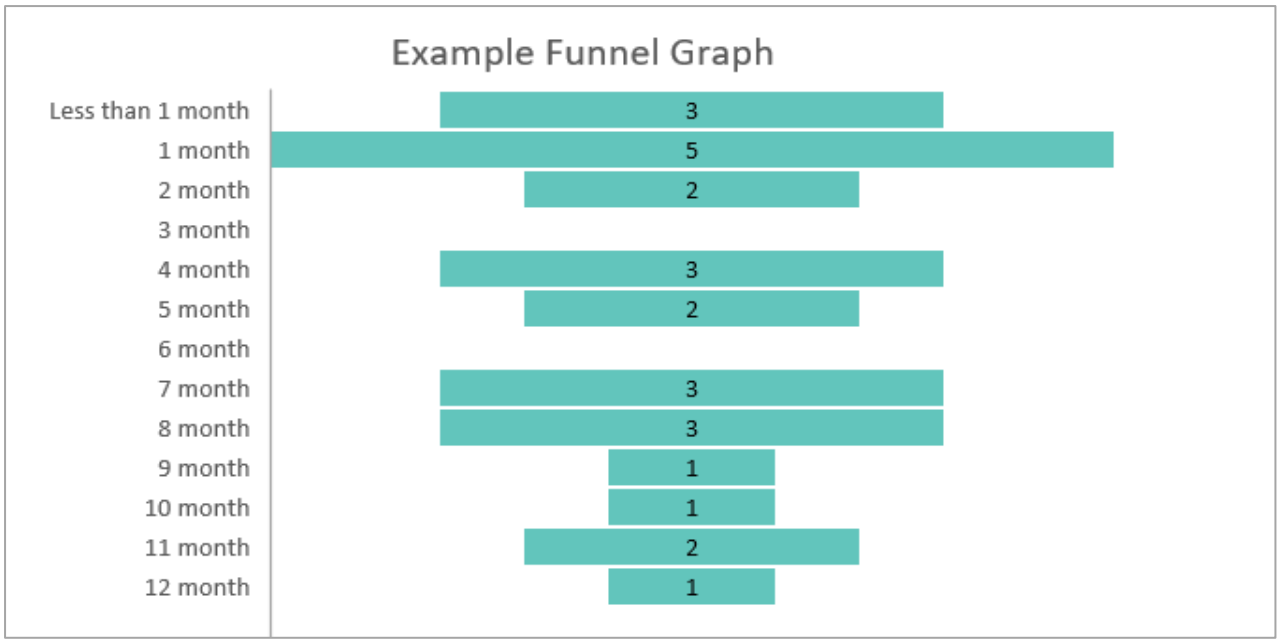
Bar Graphs

Bar graphs are used to compare things between different groups or to track changes over time. This could be to highlight changes in client presentations of a particular group eg age, gender, culture.



Funnel Graph

A funnel graph is useful to demonstrate time periods eg duration between referral and presentation, or duration of client participation in a program. To create a funnel graph, extract the relevant data from a pivot table (funnel charts cannot be generated directly from pivot tables). Copy the data into a new excel sheet, arranged in a table format (two columns). Select the data, then Insert Chart and choose "Funnel" from chart options. A funnel graph will be generated, which can be customised by adding titles, labels and other elements. If graphing for longer than 12 months, use 12+ months as category.



Phase 5: Data Informed Decision Making

Data Informed Improvement Identification

Phase supports the conversion of data findings to improvement actions by identifying 'why' something has occurred, including identifying causal factors that are not discernible from data insights alone.

The Improvement Identification Tool can be used as a tool to support identification of causal factors to avoid the risk of only treating surface level symptoms. It is designed to help identify the root cause of an issue or trend by identifying the originating process, decision or condition that led to the identified outcome. The method starts with an improvement opportunity statement and asks 'why' repeatedly to dig deeper into the causes.

Appendix 10: Improvement Identification Tool

Tips

- *It is important to approach this process with a focus on learning and system improvement, rather than assigning blame.*
- *Ensure that all stakeholders understand the issue being explored and that the improvement opportunity identified is specific and clear.*
- *Consider who should be involved or needs to inform the improvement for success considering practitioners, supervisors and client feedback, to understand different perspectives.*
- *Questions should be open-ended, non-judgmental and avoid assumptions.*
- *The process should lead to actionable insights to identify a root cause that can be actioned with changes to policy, training, communication or processes that will improve service delivery and outcomes for the client and organisation.*

Improvement Project Planning

An Improvement Project Plan supports the structured planning of improvement initiatives. It is used after identifying a problem and proposed solution, helping to organise key considerations such as resources, risks, stakeholders, and timelines. ***Appendix 11: Improvement Project Planning Tool***

Tips

- *Clearly link proposed improvement to organisational priorities, demonstrating how it can contribute to better outcomes.*
- *Consider how data has helped identify the problem and can help measure the success of the solution over time.*

Embedding Data Practices

Integrating changes resulting from data informed improvements and embedding data practices to enable a continuous improvement approach to business as usual, is an important part of maintaining successful outcomes and sustaining a continuous improvement culture.

Moving from project to program norms takes a dedicated effort including resourcing this phase to see embedding through to completing and testing take up for success.

Ways to Embed Data for Continuous Improvement

- Assign resourcing – ensure data activities are allocated to specific roles by including them in position descriptions and role KPIs.
- Include data processes in new employee inductions and annual performance reviews as appropriate to the role and responsibilities.
- Include data collection processes into work instructions, operational plans and processes, at points where data is received or collected, ensuring it is included at each stage of data transfer. *Mapping the data process flow can be helpful to identify each transfer or review point (eg data in intake forms > excel data collection > data quality review > data graphing > data reporting > report review > outcomes or improvement actions embedded in operational planning).*
- Include data process activities as standing agenda items for key internal meetings that can support manage data processes and quality assurance to ensure that practices are being sustained eg Weekly Team Meetings, Performance Review Meetings.
- Include data review activities as standing agenda items for key meetings to ensure data is being used to inform operational progress and planning, program improvements and business development eg Monthly Team Meetings, Quarterly Board Meetings, Annual Reflection and Planning Workshops.
- Include data in scheduled internal auditing processes to track performance and measure outcomes of improvements.
- Share data processes with clients, as appropriate, to provide visibility of how data is being used to inform continuous improvement in program design and delivery for continued or improved client satisfaction and service quality.
- Demonstrate value placed on client voice and experience, by including client survey, outcomes and feedback, as feedback loops in Newsletters and email communications.
- Include data insights in annual reporting externally or website updates for transparency in reporting organisational performance.

To maintain integrity and currency, and continually improve data practices and quality, this Toolkit can be reapplied at various points in time to test and update data collection practices and use. The Considerations Checklist can also be utilised at regular intervals to help identify where changes have occurred that might not be otherwise visible, to ensure intentional use of data for informed decision making, service consistency and quality, and human service sector excellence.

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Case Study

The Salvation Army: Empowering Decision-Making Through Data

Data Partnership Improving Responsiveness to Community Need

Local residents doing it tough in Gladstone will benefit as a result of increased visibility of local needs and causal factors, thanks to a collaborative data capacity building project in Gladstone, Central Queensland.

A data partnership between The Salvation Army, who are a key provider of human service supports in Gladstone, and place-based initiative Gladstone Region engaging in action Together (GRT), has resulted in a Data Dashboard that is helping grow a deeper understanding of what is occurring for local residents.

The Data Dashboard is an outcome of a two-year partnership growing local data capacity through bespoke tailoring of data visualisation tools, with a place-based focus. The result is local service data presented alongside relevant population data, enabling service demands to be compared to correlating community trends and social impacts.

The partnership commenced in 2023, with The Salvation Army and GRT establishing a formal agreement to share data through a collaborative project to grow local data capacity. The Memorandum of Understanding (MOU) formed, helped to set the partnership up for success from the start, by providing confidence that the privacy of clients would be a fundamental priority of the partnership.

The collaborative project was established in response to changes in human service demands, identifying shared objectives of both partners that focused on community and family wellbeing and improving the futures of local children.

Initial stages of the project aimed to first understand what data was already collected and for what purpose, including how data was stored, viewed and used.

A key focus of the project was The Salvation Army Doorways Emergency Relief Service in Gladstone which had seen growing demand over a period of time and highlighted that some families were struggling with cost of living and access to material basics.

While The Salvation Army already collected key data through service delivery for funding reporting, and national service data was collated in a mature data system, it was identified that there was untapped potential to optimise data collected locally to better understand local needs and inform future service delivery in the Gladstone Region.

In the exploration phases of the project, data already collected was ingested into graphing software to visualise trends and improve insights into local service demands experienced by the Salvation Army in the region.

> "The data went from words to visual, which was a big plus for the team."
>
> *– Chris Ford, Manager Philip Street Community and Families Precinct/ Corps Officer - QLD Division - The Salvation Army*

Moving from Data Visualisation to Data Correlation

The partnership created the opportunity to enhance use of the data by comparing it with population data collected and used by GRT in the Gladstone Region Wellbeing Data Hub. The combined data grew understanding of the relationship of service demands to broader community trends seen in publicly available population data. This led to the codesign of an interactive dashboard by GRT and The Salvation Army (a closed confidential data page) combining the service data with population data for increased capacity to evidence the correlation between events and impacts, for improved understanding of client needs.

GRT aims to enable more local Human Service providers to combine their local knowledge through data collection, for the collective knowledge of the sector and increased capacity to respond to local impacts for community benefit.

"The Dashboard showcases real stats helping to support the local narrative and evidence local need."

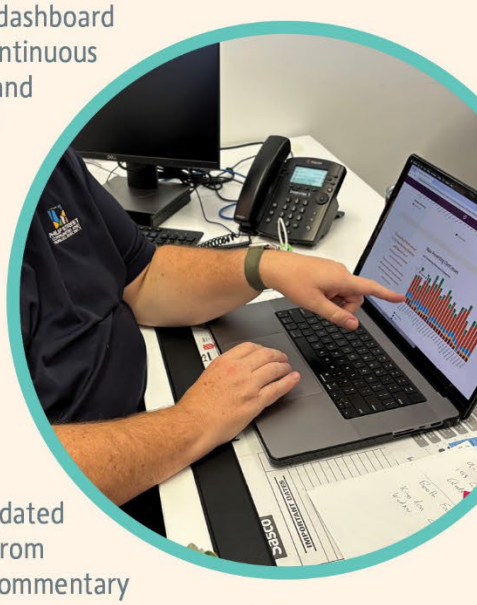
– Chris Ford, Manager Philip Street Community and Families Precinct/ Corps Officer - QLD Division - The Salvation Army

Capturing Learnings

Through the partnership, the process of both partnering, and developing fit-for-purpose tools and visualisation process and systems, also aided the development of a Data Toolkit developed by GRT in partnership with Thriving Queensland Kids Partnership (TQKP), to support data capabilities for improved community wellbeing, through place-based approaches.

The Salvation Army attribute the improved capacity for storytelling of local needs, evidenced by the visual representation of statistical service demands and correlating population trends, to their success in securing a $20,000 funding grant, within three months of the Data Dashboard being established. The grant supports Food Kingdom, which provides free and low-cost food and grocery items for the Gladstone community.

The development of the dashboard involved several steps, continuous improvement iterations, and multiple participants, and is now used for various purposes, by a variety of teams within The Salvation Army, including the local Gladstone team, the Emergency Relief Service, and the State Community Fundraising team.



The Data Dashboard is updated regularly with both data from The Salvation Army and commentary from GRT on data insights and correlations, enabling team members to 'unpack the data' to understand and monitor local trends and client needs in real-time. The use of data in this way, helps pinpoint areas for service improvement and set goals to address local issues, adjusting responses as trends change.

The Salvation Army team have reported increased confidence and comfort of local team members in interpreting data to inform service delivery, as a result of the user-friendly nature of the Data Dashboard, without the need for additional team training.

Evidenced Informed Planning

The Salvation Army aims to use the Data Dashboard and the new improved visibility of local correlating impacts, such as changes in unemployment, homelessness and domestic and family violence, to contextualise what is being seen in demand for local services and inform shared decision-making amongst stakeholders. The team are excited about the potential power of the data to help respond to local needs by identifying causes and quantifying gaps and response needs, including to address food insecurity.

The Salvation Army Team are hoping to use the Data Dashboard to better align service planning with community needs by projecting future needs using historical event data, to predict and plan future funding allocations to address client needs effectively.

For further information contact GRT:
P: 07 4970 7382
E: admin@gladstoneregiontogether.org.au
W: www.gladstoneregiontogether.org.au

Thriving Queensland Kids Partnership
connect • catalyse • learn

Gladstone Region Together

Data Toolkit
Appendices

Data Capacity Building Project Planning Tool

Purpose

What is the aim of the data collection proposed eg improve service delivery, map outcomes to refine practice, quantify need, measure value?

Data

What data will be required?

Accessible Data

What data is already collected eg intake forms, case notes?
If data is not currently accessible, how could it be collected?

What other Information Is Needed?

How will the data be defined or categorised?

Data Capacity Building Project Planning Tool

Data Collection Tools

Where will the data be stored, inputted, cleansed?

Data Collection Frequency

How often will the data be reported?

Reporting Mechanism and Frequency

Who is the report for?
How often will it be required?

Roles

ACTIVITY	RESPONSIBLE (for quality, schedule, resourcing) *eg Team Leader*	ACCOUNTABLE (for actioning) *eg Client Case Managers*
Data Collection		
Data Inputting		
Data Quality Monitoring		
Data Cleansing and Graphing		
Data Analysis		
Data Creation		
Data Review		
Data Outcome Actioner		

Considerations Checklist

The purpose of the Considerations Checklist is to ensure all aspects have been carefully considered and to prompt identification of blind spots to identify if there is anything missing from the planning processes.

It can be used at any point in the process, from considering the value, return on investment and process of data collection, to identifying or implementing a continuous improvement as a result of insights drawn from data analysis.

How to Use the Checklist

The checklist should be used by answering each question in turn, rather than just confirming that the consideration has been made. This helps deeper consideration and supports inclusion of new information as it becomes available to inform planning.

The checklist can be copied into another format for the purposes of recording outcomes, to grow depth of considerations at each stage of the project, or capture discussion outcomes of a planning team, or can be used as a prompt to inform completion of other planning tools and worksheets in the Data Toolkit.

The checklist is best used at multiple stages of the process, or anytime new information becomes available.

Alignment to Existing Goals and Priorities

- ☐ Does this action align to our values?
- ☐ Where does this activity fit within existing KPIs or measures of the program or organisation?
- ☐ Where does this activity fit within existing priorities and resourcing?
  Consider priorities identified in annual planning activities across teams and Boards or with existing partners.

Assurance Processes

- ☐ Have the organisations assurance processes been reviewed in the context of the activity?
  These might include organisational quality assurance and governance processes, policy, tools, templates and forms decision register, and risk register, or may include funding or legislative requirements eg compliance or quality frameworks, program specifications, funding agreements and guidelines.

Existing Data Assets

- ☐ Have existing data reporting processes and resources been reviewed in the context of the process being undertaken?
  Consider existing data capture tools used by the organisation for funding reporting, program data definitions and counting rules.

Stakeholders

- ☐ Who should be a part of this process?
- ☐ Who is the owner?
- ☐ Who feels they have ownership?
- ☐ Who has authority to approve this activity?
- ☐ Who is investing in this?
- ☐ Who is impacted by this?
- ☐ Who will benefit?
- ☐ Who might be detrimented?
- ☐ Who might not agree with this action or the outcome?
- ☐ Who could add value to this activity for it to be effective?

Risks and Blind Spots

- What assumptions are we making?
- What information gaps do we have? What don't we know? Do we have enough information?
- What are the risks?
- What has history taught us?
  Consider there any lessons learnt from prior organisational experience or case studies from within sector?

Capacity

- Do those involved in the project have the appropriate level of data understanding and knowledge to complete the project effectively?
- Do we have the appropriate resources to undertake this project effectively?
  Consider time, budget and impact on other operational activity.

Confidentiality

- Is data deidentified sufficiently?
- What legal and ethical compliance regulations are applicable in this context?
  Consider client and funding agreements, industry standards and legislative requirements related to data-ownership, privacy and confidentiality.
- Can anything further be done to protect client data security and confidentiality without compromising the purpose of the data sharing partnership?
- Is there any requirement to advise clients of the data sharing partnership?
  It might be helpful to consider the partnership between a client-based organisation and a place-based initiative, in the same way a consultant might be employed by the organisation and need to access deidentified client data to fulfil the contract.

Insert Organisation Logo

DATA SHARING AGREEMENT

between

PLACE-BASED INITIATIVE (INITIATVE) NAME and **HUMAN SERVICE** (**ORGANISATION) NAME**

1. Purpose of This Document

1.1. This Data Sharing Agreement outlines the relative intentions of both INITIATIVE and ORGANISATION to collaborate under the principles of mutual understanding, mutual benefits, common interest, shared goals and mutually complementary activities.

1.2. This Data Sharing Agreement outlines the terms of Data Sharing and Data Capacity Support between INITIATIVE and ORGANISATION.

1.3. It is proposed that this Data Sharing Agreement establishes opportunities for each institution to collaborate to achieve improved outcomes for community wellbeing.

1.4. This Data Sharing Agreement is not a legal agreement; however, all parties commit to using their best endeavours to achieve its purpose.

2. Objectives

2.1. Each institution pledges to cooperate in a spirit of mutual understanding and to develop a closer relationship of goodwill and friendship.

2.2. Each institution will share information with the other to help promote mutual understanding, and each will respect the confidentiality and intellectual ownership of this information.

2.3. Each institution will undertake to understand disadvantage in the 'Community Region Name' and will share data to evaluate and monitor changes and trends in contributing factors to disadvantage in social equity.

2.4. Each institution agrees to identify and leverage supporting activities which may include, but are not limited to:

- Collaboration on activities that strengthen or support the development of sustainable communities,
- Collaborative learning and design of data use to enable continuous improvement of support-opportunities,
- Collaborative consultation with stakeholders to build confidence in the use of data for improved community wellbeing,
- Collaboration on social innovation focused initiatives.

2.5. Each institution acknowledges and agrees that each institution has the right to publicly disclose this existence of this Data Sharing Agreement partnership in external meetings and reporting to external institutions, and in doing so, will respect the name and high reputation of the other institution.

2.6. In addition, INITIATIVE will support:

- Co-design and development of data collection processes and tools
- Assist in analysis of collected data to improve outcomes for the 'Community Region Name'; however, if INITIATIVE wishes to refer to the data explicitly, prior written permission of ORGANISATION must be obtained,
- Provide support to the ORGANISATION in the development of a Data Report 'agreed frequency',
- Take the necessary steps to ensure data collected under this Data Sharing Agreement cannot be re-identified,
- Ensure that all data shared by ORGANISATION under this Data Sharing Agreement will not be publicly distributed unless the prior written permission of ORGANISATION is obtained,

- Restrict use of data provided by ORGANISATION for the purposes clearly stipulated by ORGANISATION for each dataset provided,
- Provide any proposed external facing data outputs such as Dashboards or Reports, containing data provided by ORGANISATION, for approval, prior to sharing the data with a third party or making the data publicly accessible.

2.7. In addition, ORGANISATION commits to:

- Provide deidentified data 'agreed frequency' to INITIATIVE,
- Ensure the INITIATIVE branded data report (or extracts of), created under this Data Sharing Agreement will not be published unless the prior written permission of INITIATIVE is obtained,
- Take the necessary steps to ensure data shared under this Data Sharing Agreement cannot be re-identified,
- Provide deidentified client data, specific to the 'Community Region Name' at an 'agreed frequency', for the purpose of sharing data via the data platform known as the 'Data Platform Name' in the agreed options of:
  a) Closed individual platform, where only ORGANISATION and INITIATIVE can access the data through a private platform not viewable by the public,
  b) Closed sharing platform, where only ORGANISATION, INITIATIVE and other organisations can view the data through a private platform accessible by the listed partners, OR,
  c) Public sharing platform, where data is viewable by the whole community through the publicly accessible platform.

3. Period of Arrangement

3.1. This Data Sharing Agreement shall commence on the date of its execution by the last to sign of INITIATIVE and ORGANISATION and shall remain in force until 'agreed date' (with a review to be undertaken every 12 months). If the Data Sharing Agreement remains dormant for a 12-month period, it will be deemed to have lapsed.

3.2. The Data Sharing Agreement may be renegotiated at any time during the period of the arrangement.

3.3. Any changes to the Data Sharing Agreement must be agreed by both parties with copies of the changes provided to both parties.

[Remove below if not applicable]

3.4. Either party may terminate the Data Sharing Agreement by giving 30 days written notice to the other party and all previously provided data will be removed from the 'Data Platform Name'.

4. Data Management

4.1. INITIATIVE's process to assess data use and access complies with INITIATIVE Research Data Management Policy and Procedure, Data access and re-use section (insert section and item details),

4.2. Data storage - The data is stored on the 'Data Platform Name' until 'date', or if agreed, to an extended date. At the termination of the 'Data Platform Name' subscription, INITIATIVE will extract all data within 20 business days. This complies with the INITIATIVE's Research Data Management Policy and Procedure, section (insert section number) As per Procedure 'insert procedure item number', ORGANISATION data will not be disposed of unless written permission for destruction has been provided by ORGANISATION.

[Remove below if not applicable]

4.3. Data sovereignty - The data accessible within the 'Data Platform Name' is stored in 'insert details' in Australia. The 'Community Region Name' own the data.

4.4. Data security - The 'Data Platform Name' cyber security and data storage processes have been assessed by INITIATIVE as compliant with INITIATIVE's Research Data Management Policy and Procedure, section ('insert section number'), Procedure 'insert procedure number'.

5. Agreement Between Parties

5.1. Nothing in this Data Sharing Agreement shall be construed as creating any legal relationship between the parties; its provisions do not create rights, obligations or duties for either party. This Data Sharing Agreement is a statement of intent to foster genuine and mutually beneficial cooperation.

5.2. This Data Sharing Agreement shall not prejudice any rights and obligations of either party in any international agreements or conventions.

5.3. The institution representatives responsible for this Data Sharing Agreement are 'insert name' (INITIATIVE-CEO or DIRECTOR or more senior) and 'insert name' (ORGANISATION - CEO or DIRECTOR or more senior).

6. Signatories

This Memorandum of Understanding was agreed between:

INITIATIVE NAME	WITNESS
Signature:	Signature:
Date:	Date:
Name:	Name:
Position:	Position:
ORGANISATION NAME	**WITNESS**
Signature:	Signature:
Date:	Date:
Name:	Name:
Position:	Position:

Data Terminology 101

Building community data capacity.

Data

A collection of discrete values that convey information, describing quantity, quality, fact, statistics and other units of meaning that is used for reference or analysis.

Dataset

A collection of related data items eg: the responses of survey participants.

Data Variable

Variables are the numeric and non-numeric characteristics or attributes being observed, measuring and recording data for, like “how many” or “what type” eg: number of children in a family, academic grades, clothing sizes, eye colour.

Data Sovereignty

A group or individual’s right to control and maintain their own data, which includes the collection, storage, and interpretation of data.

Primary Data Source

Original data collected by researchers and organisations eg: interviews, case studies and questionnaires.

Secondary Data Source

Data that already exists and are being presented by someone other than the data collector eg: readily available published articles, reports and online databases.

Statistical Area

The Australian Statistical Geography Standard (ASGS) classifies Australia into Statistical Areas by population size for the purpose of consistency in comparing data across locations or time periods.

Mesh Blocks (MBs)

The smallest geographic areas, used as building blocks for other statistical areas.

Statistical Area Level 1 (SA1)

A small geographical area generally having a population of 200 to 800 people.

Statistical Area Level 2 (SA2)

A medium-sized area built from whole SA1s, representing communities that interact socially and economically, generally with a population between 3,000 to 25,000 people.

Statistical Area (SA3)

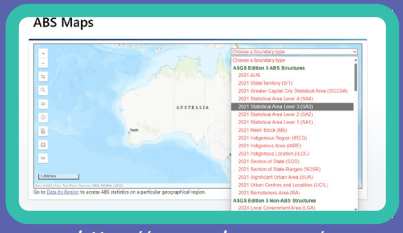
Geographic areas built from whole SA2s. Designed for the output of regional data, generally with populations between 30,000 and 130,000 people.

Statistical Area (SA4)

Geographic areas built from whole SA3s often representing regional labour markets, generally with populations over 100,000.

Local Government Area (LGA)

An administrative division of a country that a local government is responsible for.



https://maps.abs.gov.au/

Sample

A sample is a smaller set of data that is selected for a larger population using pre-defined selection methods eg: 500 people sample size from a 5000-person population.

Social Indicator

Measures that describe and monitor the wellbeing of individuals or communities and guide intervention to alter the course of social change eg: participation in employment.

Social Indicator Measurement

Determines how social indicators will be measured to monitor and progress change eg: unemployment rate.

Social Indicator Outcome

The outcome of the social indicator and its measurements.

Qualitative Data

Data that is non-numerical and used to gain an understanding of individual reality, attitudes, beliefs and motivations. Qualitative data can be collected through observation, one-on-one interviews, surveys, focus groups or similar methods and can be grouped by themes or categories. Qualitative data tells a story and characterises an issue.

By categorising qualitative data in a consistent manner, quantitative data can be created, for example using multiple choice questions in surveys or numeric scales to rate an experience instead of open fields.

Quantitative Data

Generally numbers/statistics. Data that focuses on quantifying the collection and analysis of data by numeric variable. Quantitative data can be counted or measured and is quantifiable, and may also be known as Numerical Data.

Data Unit

A data unit is one entity (such as a person or business) in the population being studied, about which data is collected. A data unit is also referred to as a unit record or record.

Data Snapshot

A view of data from one time-period eg: 2021 Snapshot.

Frequencies

A relative frequency describes the number of times a particular value has been observed to occur in relation to the total number of values for that variable. The relative frequency is calculated by dividing the absolute frequency by the total number of values for the variable. Relative frequencies can be expressed as ratios, rates, proportions and percentages.

Data Time Series

Data from several time periods used in comparison to explore historical trends eg: annual averages across years 2015-2021.

Data Limitations

A principle that data collected for one specified purpose should not be used for a new, incompatible purpose. It is a limit in that data eg: limited sample size used for a survey. A retirement village satisfaction survey may have data limitations if only males aged over 85+ responded.

Assumptions

A belief or expectation that is considered likely to be true, even without concrete proof eg: migration to the region increased due to industry recruitment.

Example of how quantitative and qualitative data can be gathered from the same data unit

Data unit	Numeric variable = Quantitative data		Categorical variable = Qualitative data	
A person	"How many children do you have?"	4 children	"In which country were your children born?"	Australia
	"How much do you earn?"	$60,000 p.a.	"What is your occupation?"	Photographer
	"How many hours do you work?"	38 hours per week	"Do you work full-time or part-time?"	Full-time
A house	"How many square metres is the house?"	200 square metres	"In which city or town is the house located?"	Brisbane
A business	"How many workers are currently employed?"	264 employees	"What is the industry of the business?"	Retail
A farm	"How many milk cows are located on the farm?"	36 cows	"What is the main activity of the farm?"	Dairy

Source: Australian Bureau of Statistics (ABS), Quantitative and Qualitative Data

Appendices – Excel Spreadsheet Templates and Examples

Data Report May 2025

Client Demographics and Presenting Concerns

Harbour Town Neighbourhood Hub is an inclusive support service that offers support, programs and services for all ages and abilities, to enhance community member's sense of belonging and improved health and wellbeing.

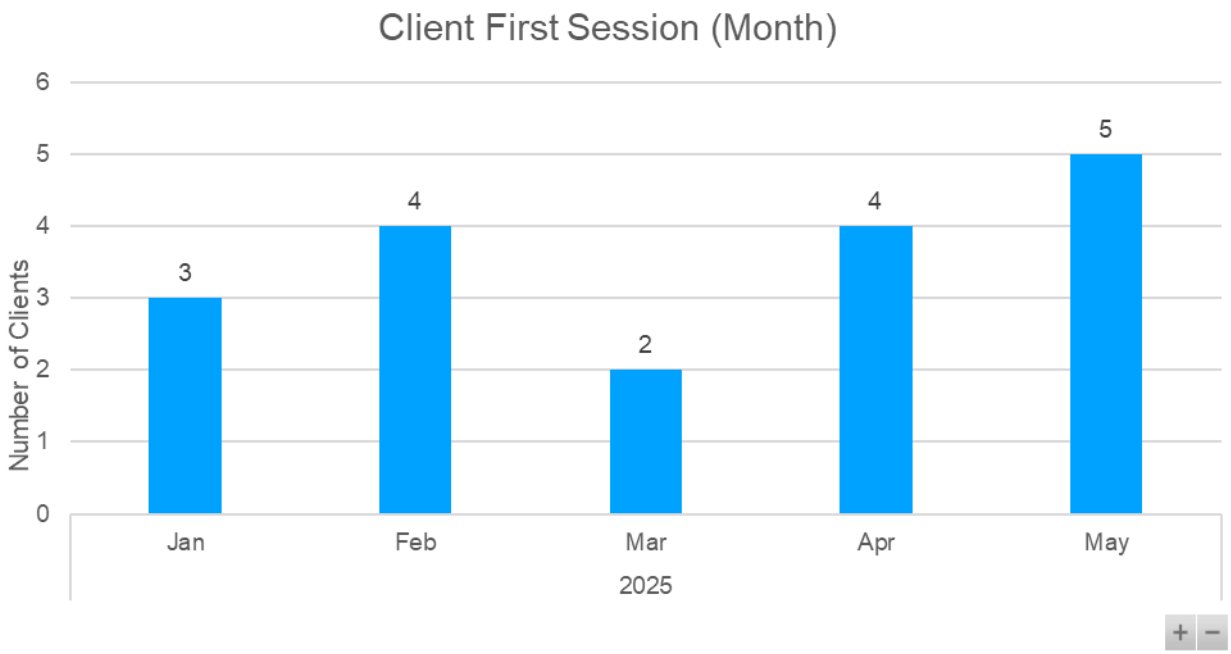
The purpose of analysing Harbour Town Neighbourhood Hub's data is to gain insights into the wellbeing needs in the Region.

This report presents data for the month of May 2025 (1 May 2025 – 31 May 2025), with comparative analysis using data from previous reported months to support the identification of trends and inform service improvement.

Note: Any graphs presenting data by month refers to the month of the client's first visit.

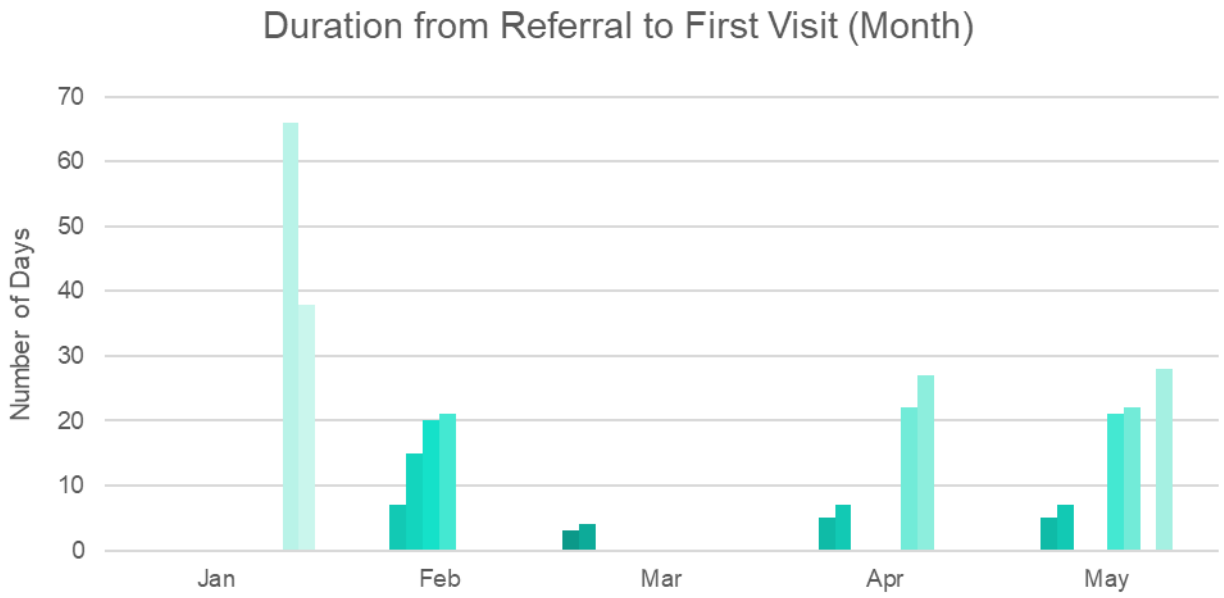
Client First Session

In May there were 5 new clients. This represents the highest number of new client first sessions for 2025. From May to May 2025 there has been an increasing trend of new clients.



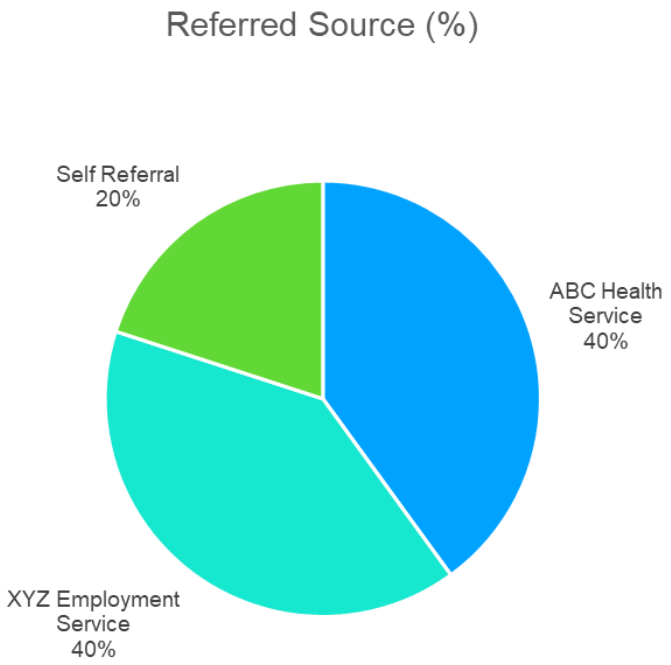
Duration between referral and client first visit

In May, the average duration between receiving a client referral and the first client session was approximately 15 days. From February to May 2025, there was a general upward trend in wait times, increasing from around 10 days in February to 30 days in March, before decreasing again in April and May.

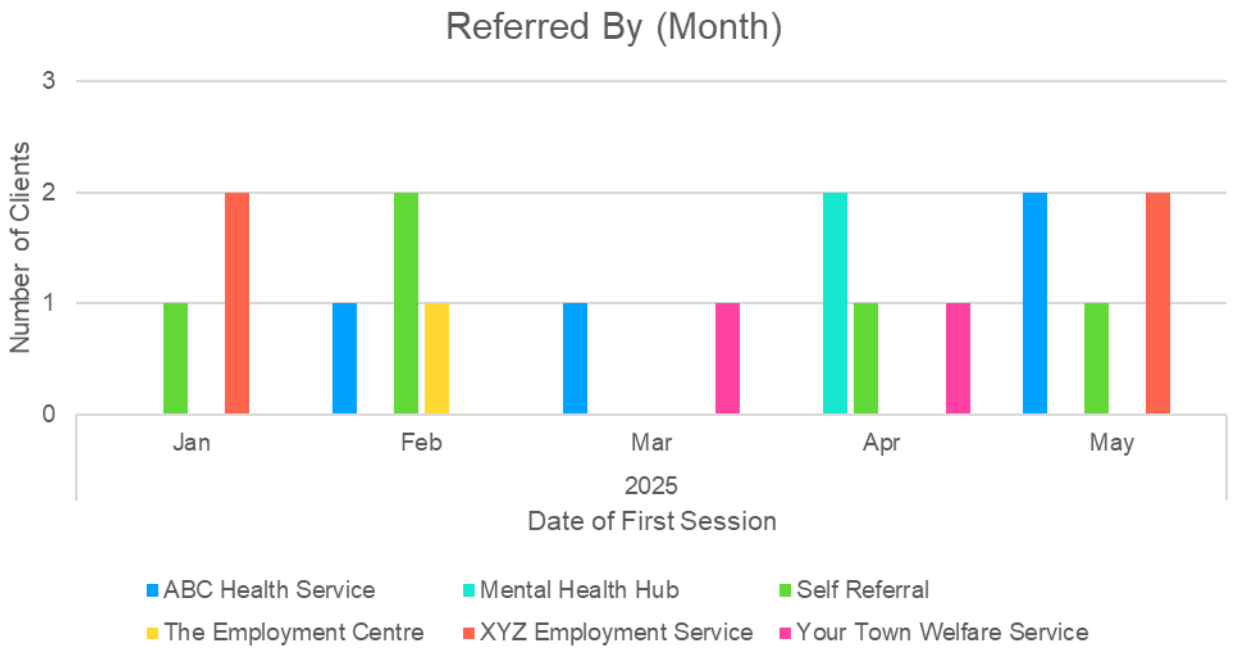


Referral Source

ABC Health Service and XYZ Employment Service were the highest sources of referrals in May.



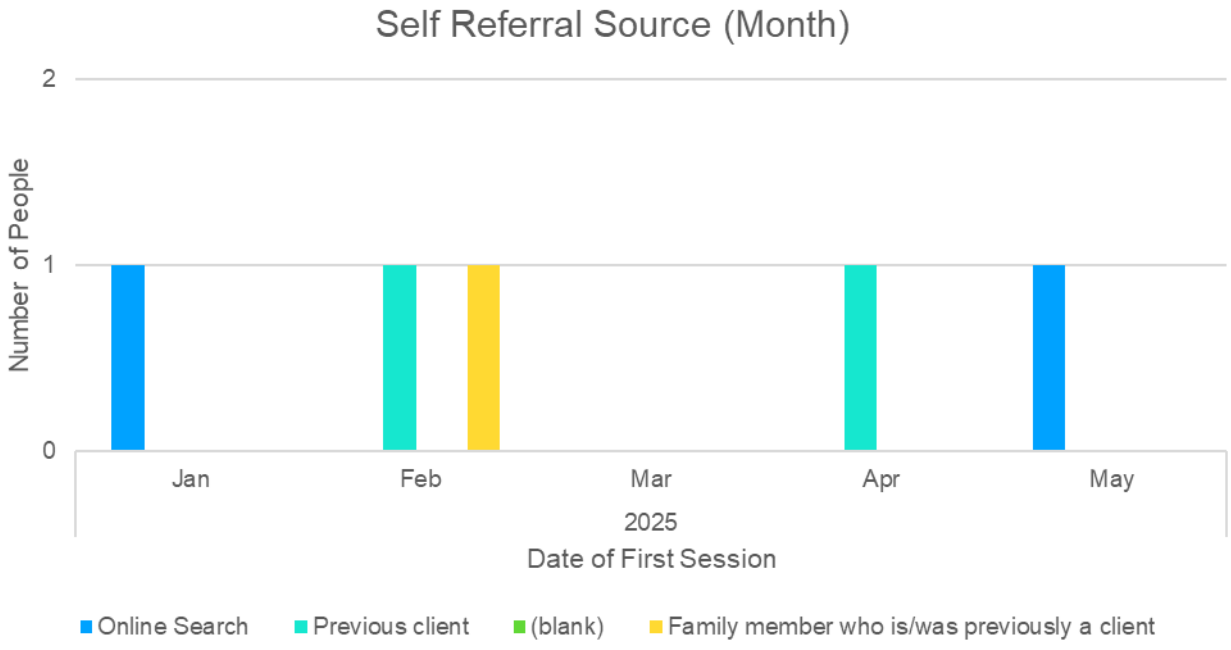
From January to May 2025, self referral is the highest source of referral, followed by XYZ Employment Service. The Employment Centre has been the lowest source of referral. No new referrals have been received from the Employment Centre since February.



Self Referral Source

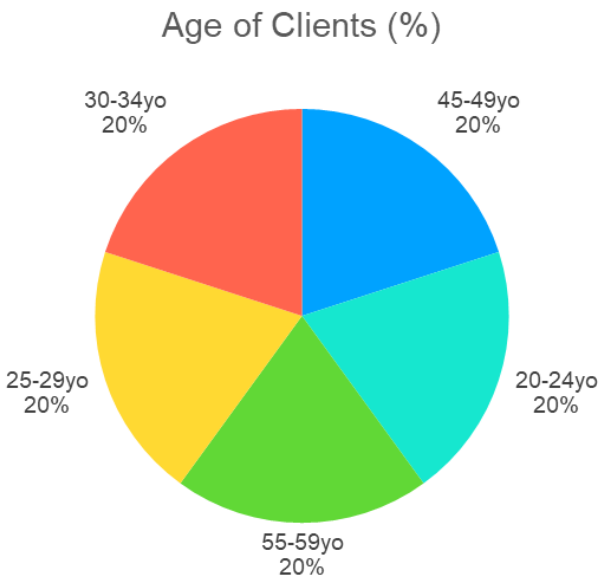
Of the clients who attended their first session in May, one self referred as a result of finding the service through an online search.

Clients who have self referred have either found the service through an online search or were recommended by a family member who is a current or former client.

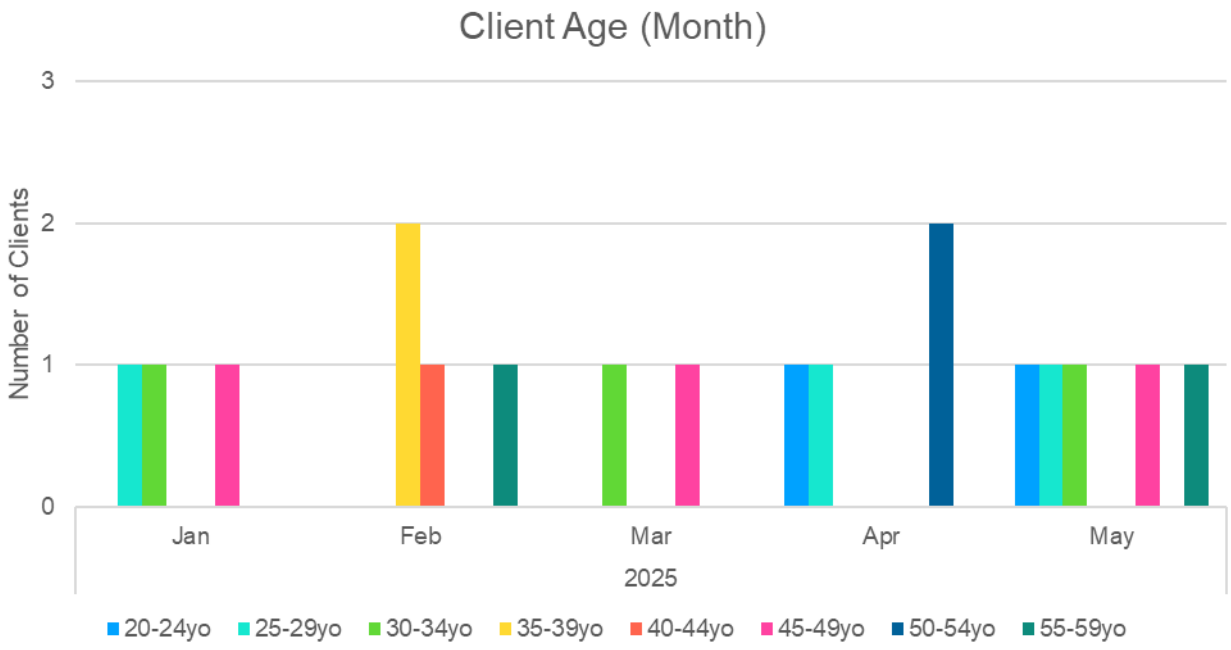


Client Age

Client presentations in May were evenly distributed at 20% across the 20-24, 25-29, 30-34, and 45-49 and 55-59 age groups.

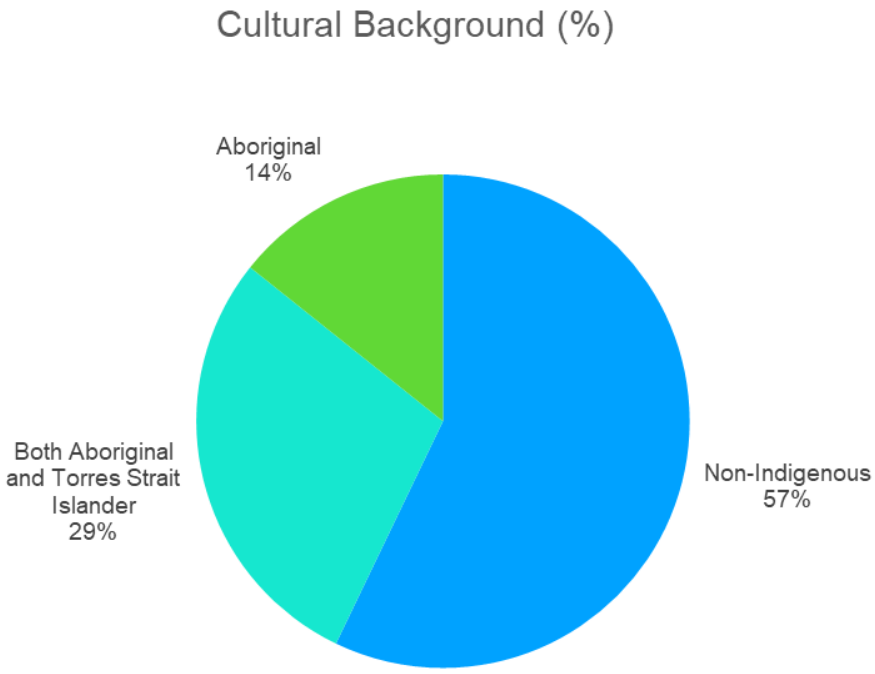


Year to date, the most common age groups were 25–29, 30–34, and 45–49.

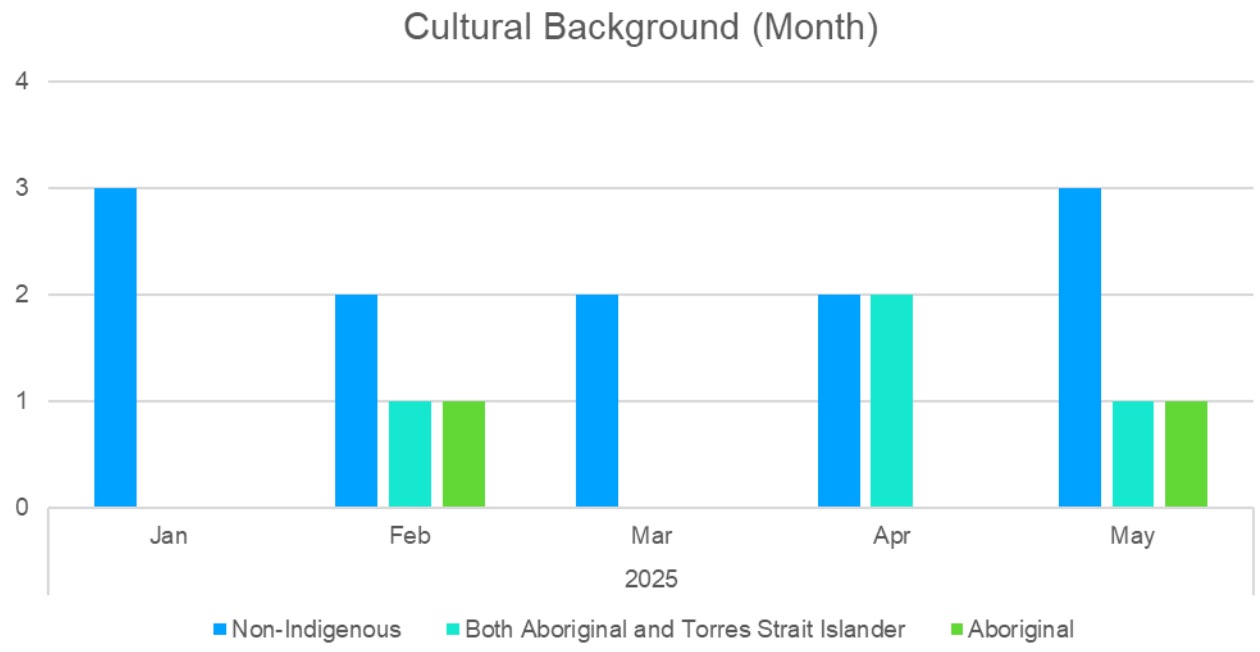


Cultural Background

50% of clients identified as Non-Indigenous, 25% identified as both Aboriginal and Torres Strait Islander and 25% identified as Aboriginal.

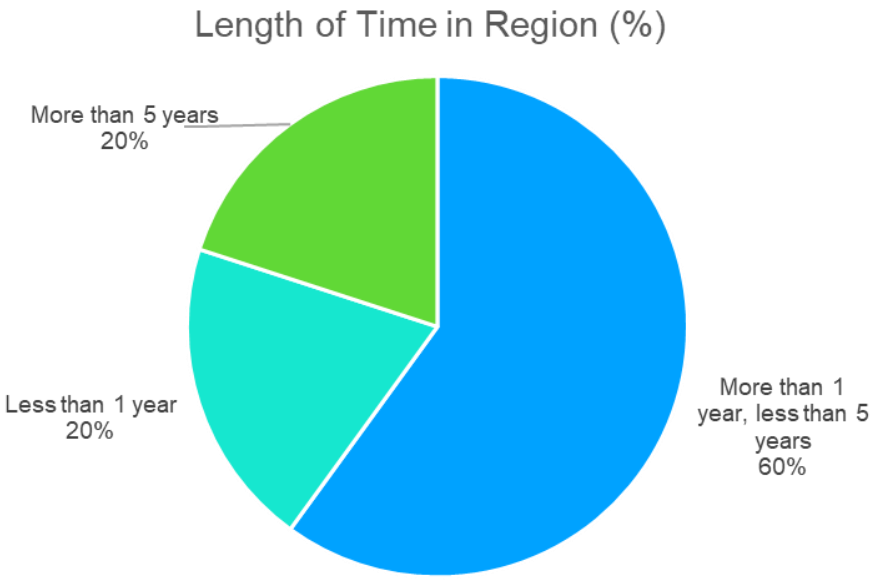


Non-Indigenous clients have consistently been the most represented from January to May 2025.

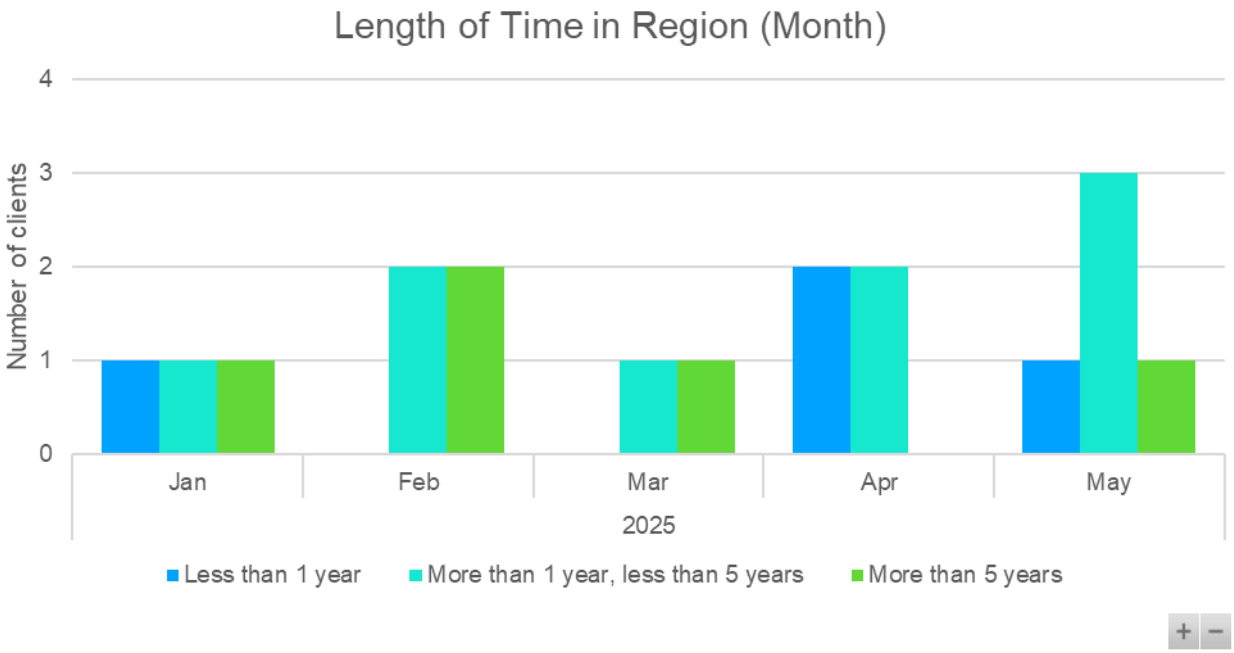


Length of Time Client Has Lived in Region

60% of clients have lived in the region for more than 1 year but less than 5 years. 20% have lived in the region for less than 1 year, and 20% have lived there for more than 5 years.



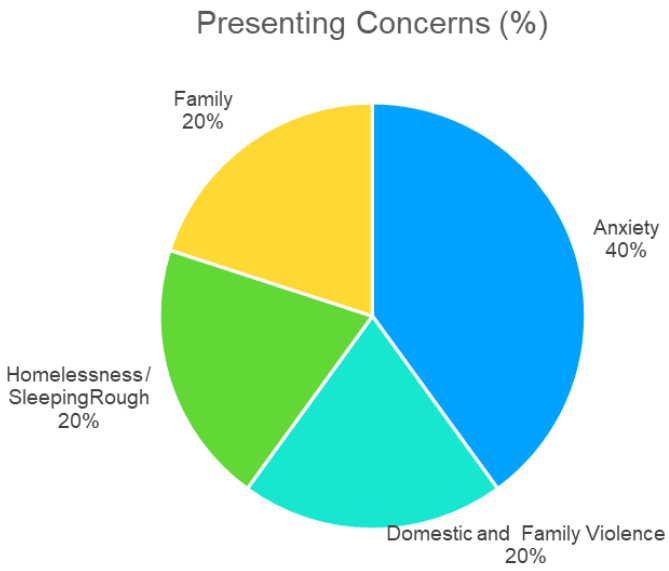
Clients who have lived in the region for 1–5 years and more than 5 years presented each month from January to May 2025. There has been an increasing trend for clients who have lived in the region for 1-5 years.



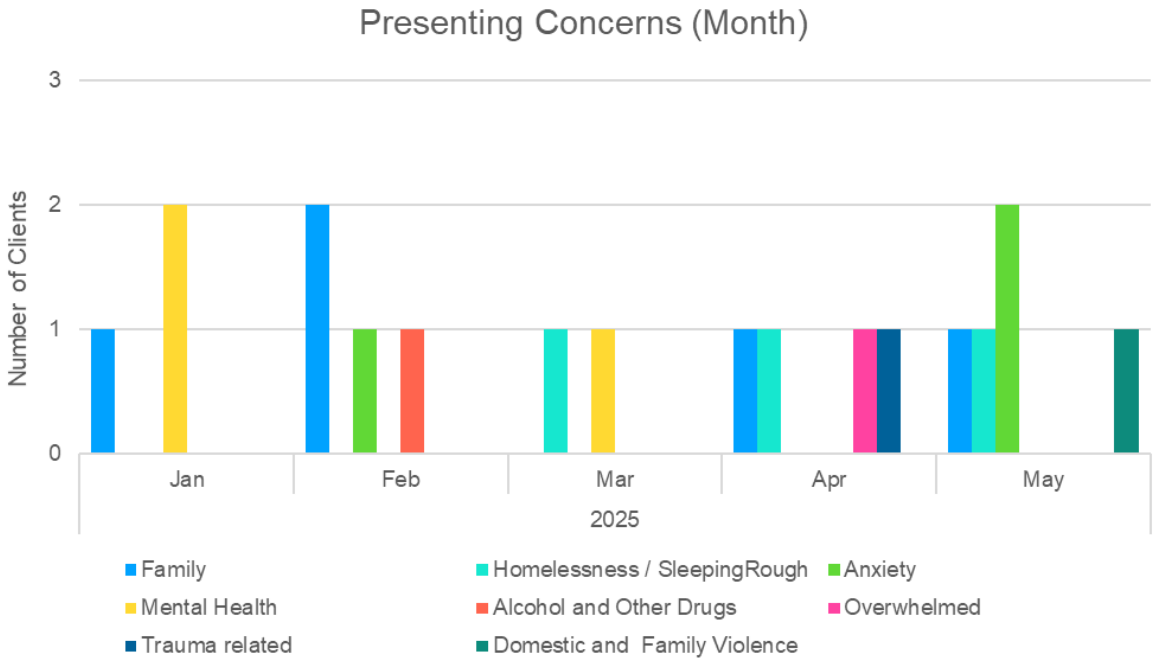
Presenting Client Concerns

Clients can present with more than one initial presenting support need.

40% of clients presented with anxiety concerns. Other presenting concerns were related to family, homelessness/sleeping rough, and domestic and family violence.

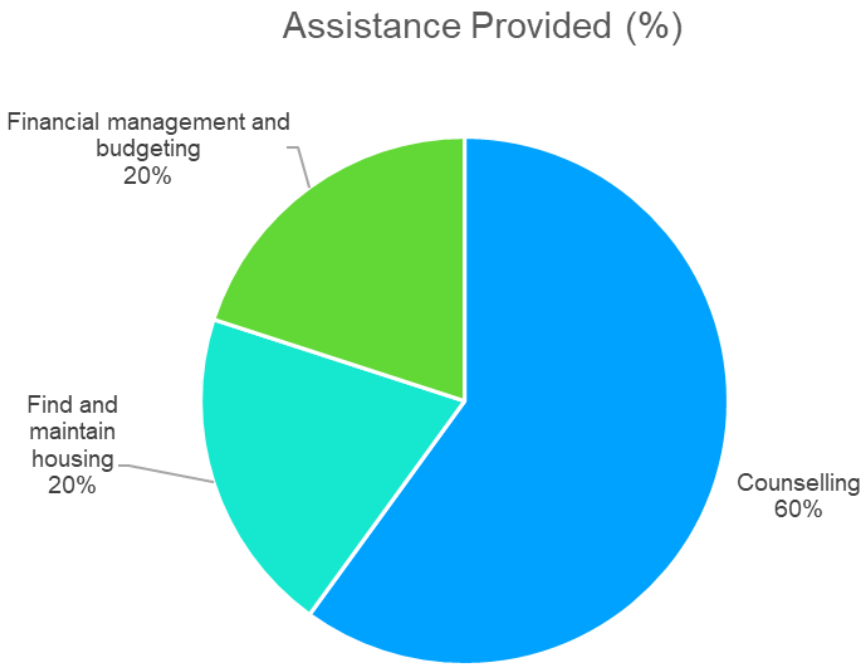


From January to May 2025 family has been the highest presenting concern. There has been a decline in Mental Health presenting concerns, with no presentations after March. Presentations of homelessness have occurred in the consecutive last three months (March–May). The first presentation of domestic and family violence in 2025 occurred in May.

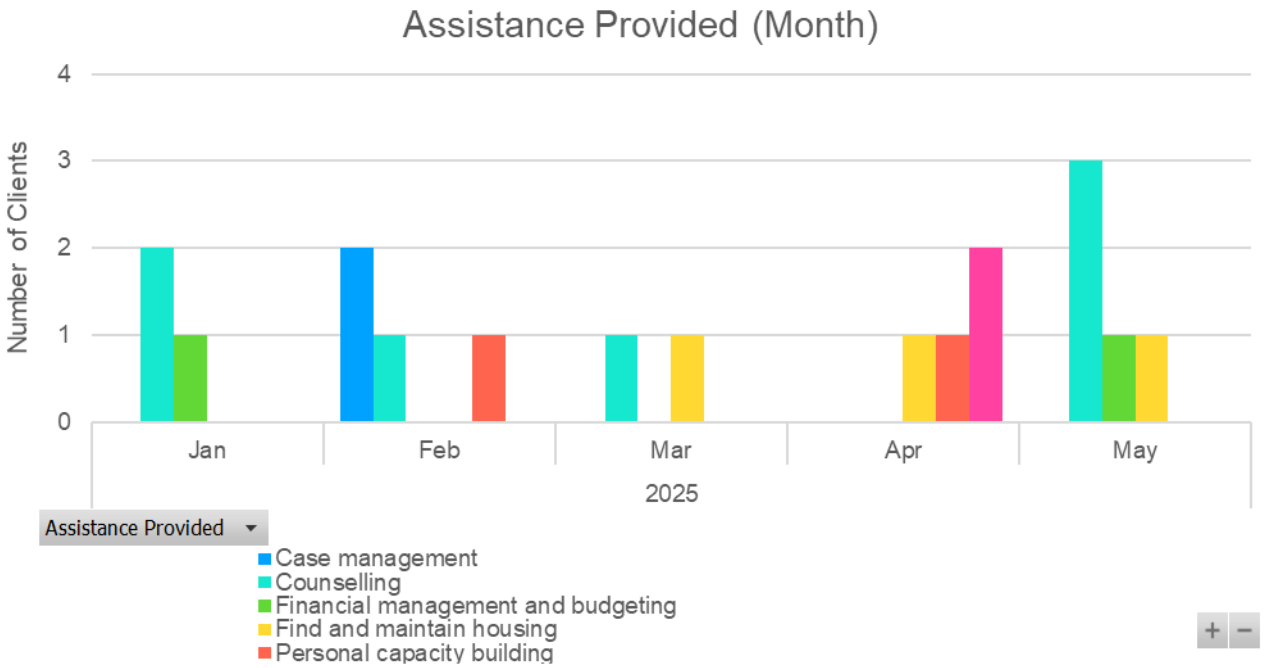


Assistance Provided

60% of assistance provided was counselling, followed by 20% for financial management and budgeting and 20% for assistance to find and maintain housing.



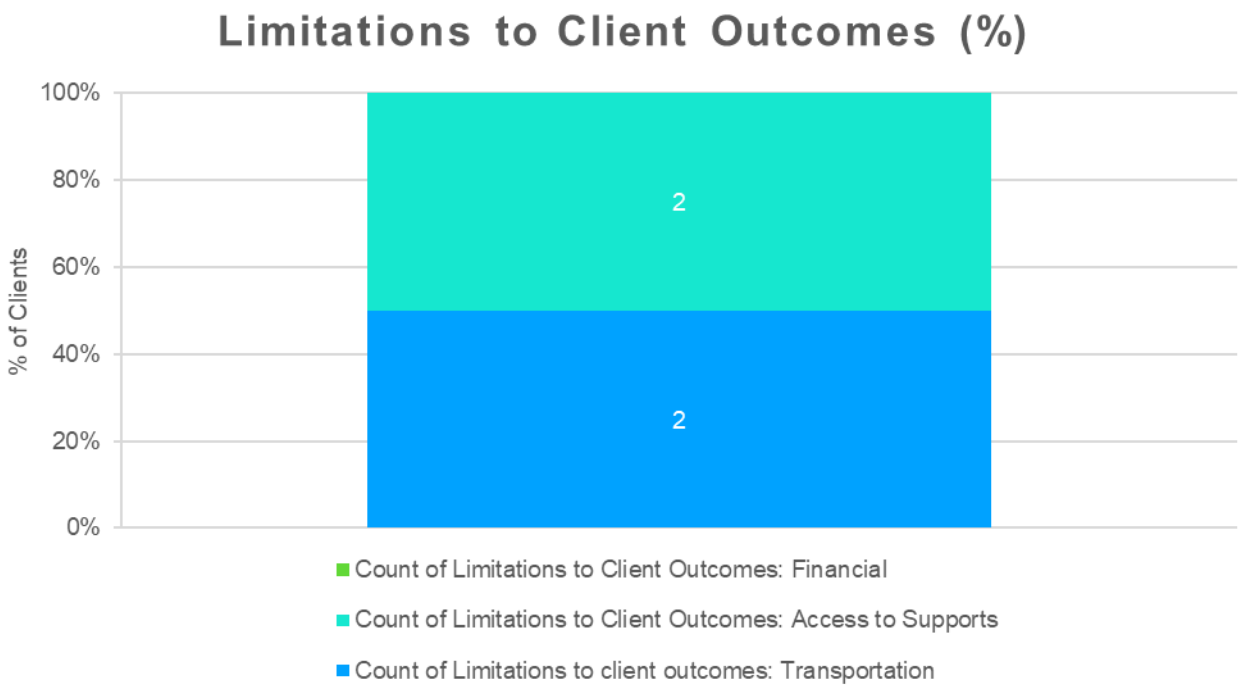
Counselling has been the most frequently delivered form of assistance, with May recorded as the highest month to so far this year. From March to May assistance to find and maintain housing was provided each month.



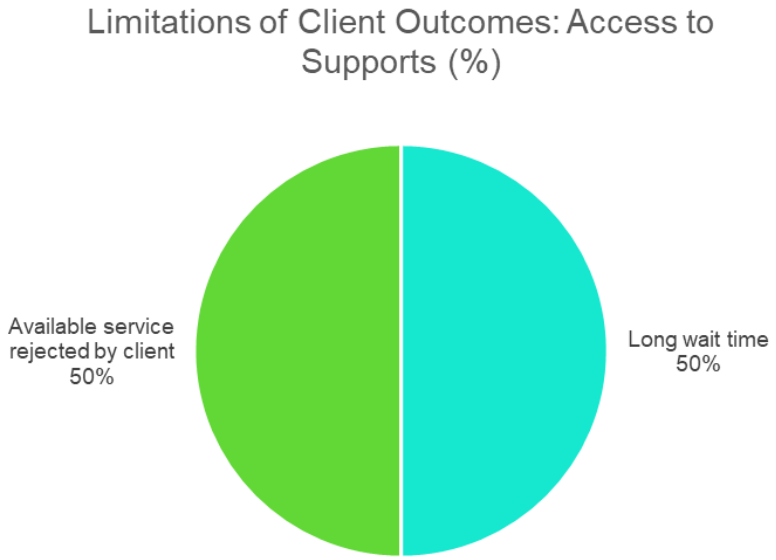
Limitations to Client Outcomes

Client outcomes may be limited by factors such as financial, access to support or transportation. Some clients may experience multiple limitations, while others may not experience any.

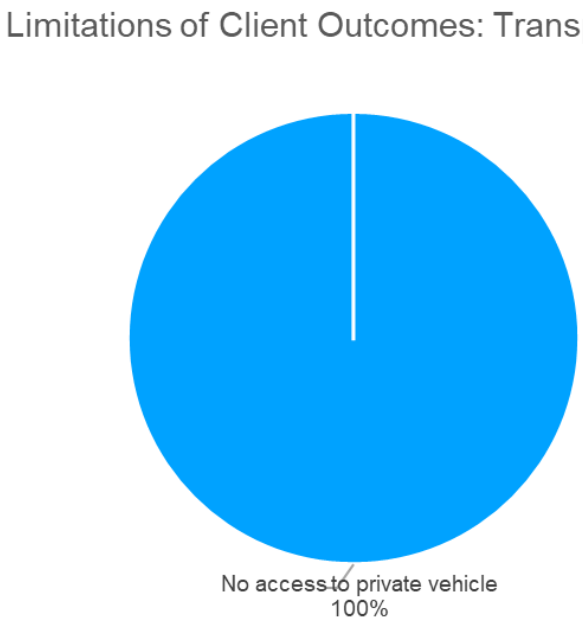
Four clients in total experienced limitations in May.



Of the clients who experienced limitations accessing support, 50% experienced long wait times, and 50% declined available services.



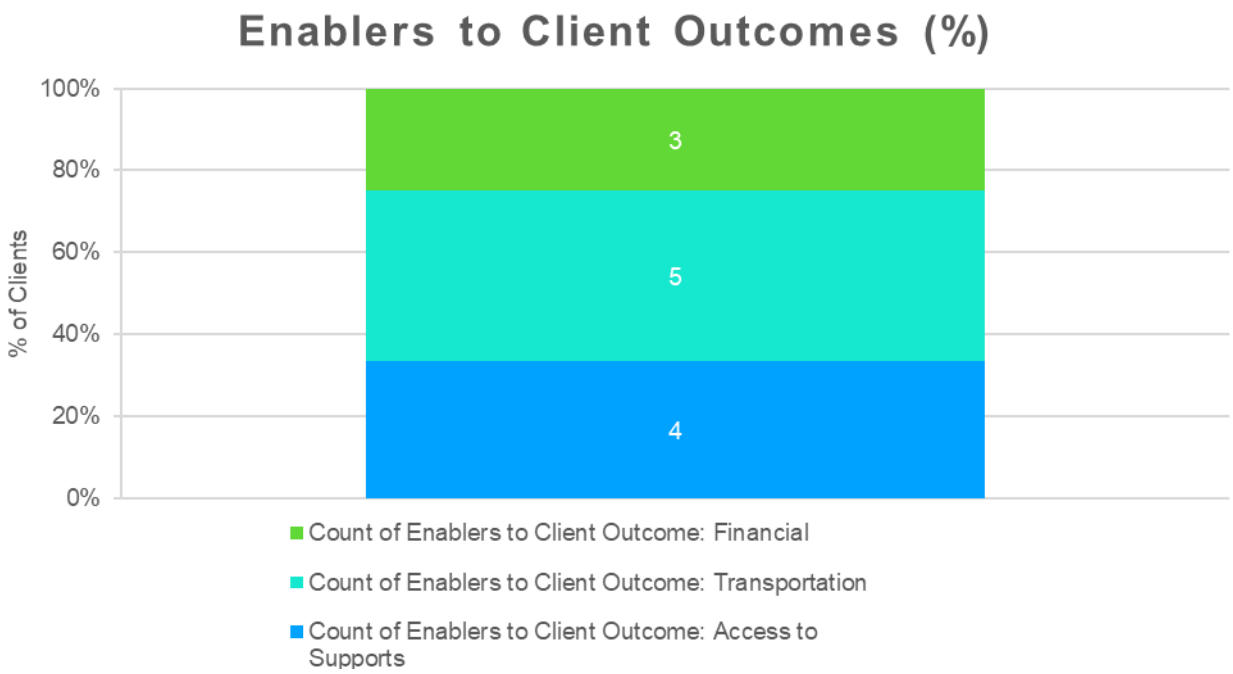
Lack of access to a private vehicle was single factor reported by clients who experienced transport limitations.



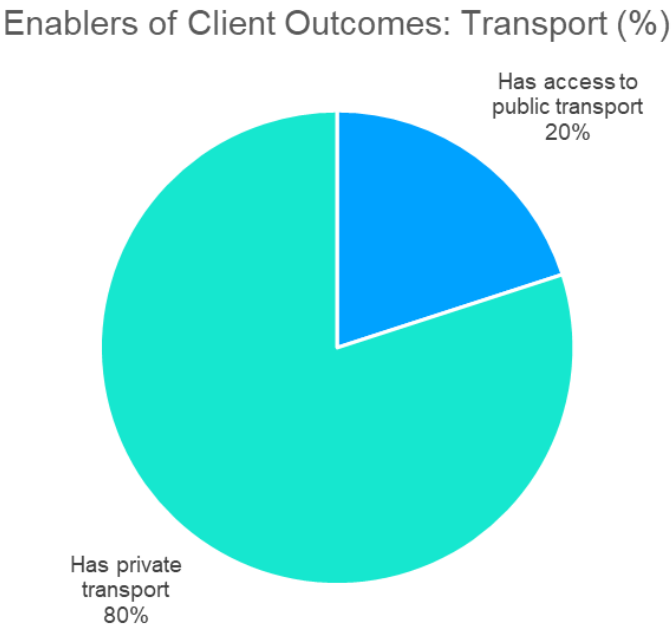
Enablers to Client Outcomes

Client outcomes may be enabled by factors such as financial, access to support or transportation. Some clients may experience multiple enablers, while others may not experience any.

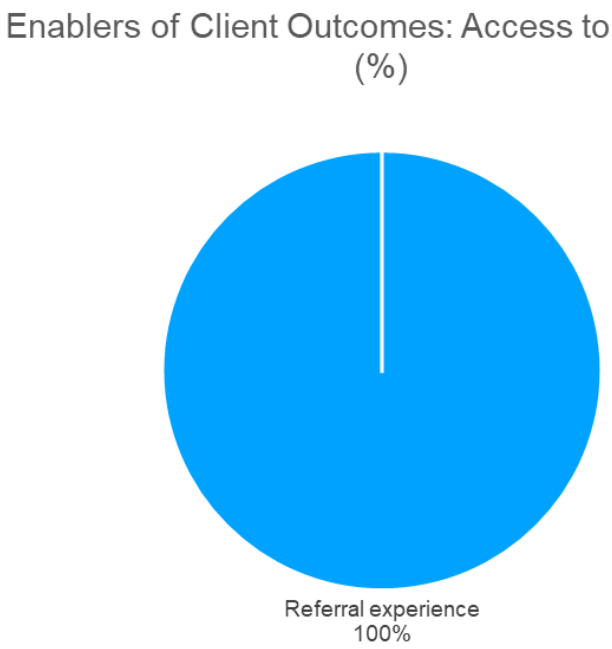
In May, transportation was the leading enabled, followed by access to support then financial.



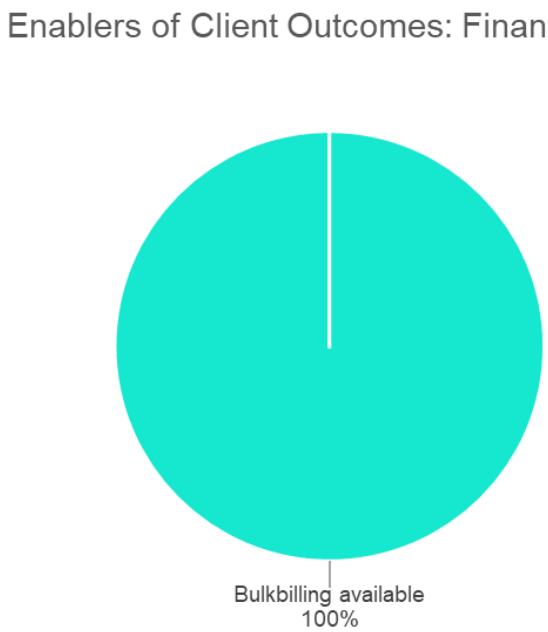
Of the five clients who reported transportation as an enabler, 80% accessed to private transport and 20% accessed to public transport.



Positive referral experience was the main factor that enabled outcomes for four clients who reported support-related enablers.



Access to bulk billing was the main factor that enable client outcomes for three clients who identified financial enablers.



Opportunities for Data Capacity Continuous Improvement

The data visualisation and comparative analysis in this report provides opportunity for Harbour Town Neighbourhood Hub to evaluate and understand client demographics, participation and outcomes data for May 2025. Examination of the data can assist practitioners to identify trends, patterns and changes over time, which will provide performance insights into service delivery.

The identification of what limitations are for referral to other services and where there is change over time would be useful to correlate.

Improvement Identification Tool

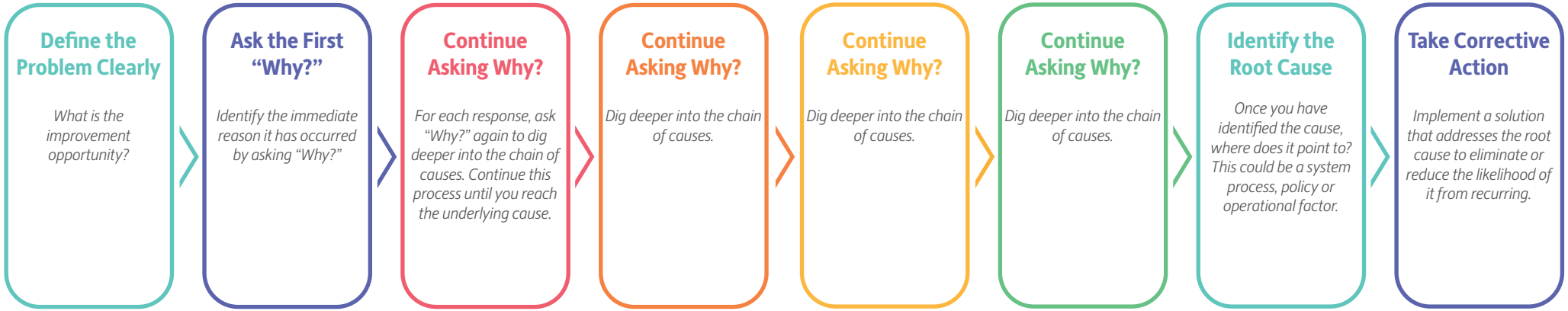
The purpose of this tool is to find improvement opportunities instead of just treating the symptoms. It involves digging deeper into causal factors with a goal to identify a process, decision or condition that will lead to an opportunity, to take corrective action. The method starts with a statement for improvement, and ask 'why' repeatedly to dig deeper into the causes.

After completing a data collection and analysis project, you may find opportunities to:

- identify program uptake
- identify client participation rates
- improve service delivery
- determine outcome achievement levels.

To move from data insight to action, the *Improvement Identification Tool* helps uncover why causal factors are happening, at a structural, operational, or policy level.

How does it work?



Improvement Identification Tool

Thriving Queensland Kids Partnership
connect • catalyse • learn

Gladstone Region Together

Template

Define the Problem Clearly	Ask the First "Why?"	Continue Asking Why?	Continue Asking Why?	Continue Asking Why?	Continue Asking Why?	Identify the Root Cause	Take Corrective Action

Example

Define the Problem Clearly	Ask the First "Why?"	Continue Asking Why?	Continue Asking Why?	Continue Asking Why?	Continue Asking Why?	Identify the Root Cause	Take Corrective Action
Only one referral was received from the Employment Centre from January to May 2025.	*The Employment Centre did not actively refer to the organisation during that time.*	*The Employment Centre staff were either unaware of our services or unclear on the referral process.*	*To date, there has been limited communication or opportunities for connection between our service to the Employment Centre.*	*The Employment Centre are newly established service in the region, operations commenced in January. Internally no one was assigned to establish and maintain contact.*	*No internal stakeholder management process or information share with new services about the programs available.*	*Lack of internal stakeholder management and communication plans.*	*Map local referral services and identify internal lead to appropriately management new and existing relationship. Develop communication pack to distribute to local referrers to build awareness of programs and referral pathways.*

Improvement Project Planning Tool

The purpose of this planning tool is to ensure success in the testing or implementation of an identified improvement through thorough consideration and planning.

Following completion of the **Improvement Identification Tool**, the corrective action identified as an improvement opportunity or solution to an identified problem, can be planned out using this tool. Completion of this planning tool is best done in conjunction with the **Considerations Checklist.**

What is the Problem Identified to Solve?

This will be the defined problem used in the Improvement Identification Tool, *and can be copied from the 'Define the Problem Clearly' column.*

What is the Solution Identified to Test or Implement?

This is the outcome of the Improvement Identification Tool, *and can be copied from the 'Take Corrective Action' column.*

Background

What has been done to date or tested before that might be useful to know in the context of planning this improvement? Are there lessons learned from previous improvement actions?

Resourcing

Who will be responsible for this improvement, including ensuring it is resourced effectively, and that time and budget are appropriately allocated and managed?

Consultation

Who needs to be consulted to ensure all considerations have been made, and assumptions tested, about the intent and potential impact of the change? Is there sufficient lived experience informing the planning?

Risks and Mitigations

Consult the Considerations Checklist as part of the design process to help manage and mitigate risks, including testing assumptions and identifying blind spots.

Constraints, Limitations and Dependencies

What factors might impact on this improvement project? Is enough information available?

Effectiveness

Will this improvement solve the problem? Can anything further or more courageous be done?

Stakeholders

Who is involved in implementing, observing or assessing the outcomes? What are their roles and responsibilities? *ARACY Matrix could be developed if useful.*

Time Period

What is the timeframe being applied to test or implement this improvement before review of outcomes? Are there key milestones that review dates should be assigned to? Where else in operational activity planning do these milestones need to be included eg scheduled planning days or Board Meetings?

Implementation

What are the implementation steps, milestones and timeframes?

Activity	Date
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Include as many steps as possible to clearly articulate each element of the testing and implementing the improvement.

Developing a more detailed project plan with schedule dependencies and responsible stakeholders or resource allocations might be appropriate depending on the complexity of the project.

Communicating Temporary Change

Who needs to be informed of the change prior to implementation? During, or post implementation?

Measuring Change

What measurement will be used to determine if implementation of the improvement resulted in change? How will this measurement occur?

Assessing Immediate Outcome

How will the change occurring be assessed? By who? How much change needs to occur for the improvement to be adopted into business as usual?

Embedding

How will the change be embedded if it is assessed as effective? *Consider staff training, onboarding, workflows, risk mitigations and controls processes and policies.*

Communicating Permanent Change

Who will the change need to be communicated to? How? When?

Assessing Longer-Term Outcome

How will the assessment be made of how successful embedding the change as business as usual has been and whether it is evidenced in the data over a longer term? When will this occur?

Completing the Project

How will it be determined that the project is successfully completed?

Ensure each activity identified above is included in the Implementation Steps scheduling process or scheduled into operational activity.