# Organisation overview

## Standard report – available to all organisations

| This is an image of the Organisation overview report icon | This report provides a one-stop view of an organisation’s service delivery over time. You will only see the information submitted by your organisation, or organisations with which you have a ‘handshake’ arrangement.  By using the reporting filters, the report will display information on client types and demographics, outlets, services types, and patterns of service delivery. |
| --- | --- |
| Unique features: |  |
|  | * Shows delivery partner data – where ‘handshake’ agreements are in place * Provides support person data (as separate from clients). |
| Key questions: |  |
| Examples of possible analysis areas (questions the report can answer) | * What program activities do we deliver? From which outlets? For each activity delivered, what were the total number of cases, sessions, individual/group clients and support persons? * Who are our clients and why do they seek our services? Were they referred to us? Are they part of a priority group for this program? * Have we recorded key client demographic details? Do these correspond to the target groups for our program? * When filtering to show individual and group clients, what does this tell us about our client group? Do we have higher or lower numbers than expected? * What outlets do we have and who uses them? Which program activities are delivered at those outlets? What could the reason be for variations in client numbers or activity levels? * Does the data suggest there may be different practises at different outlets? * How many sessions have we delivered over all? How many sessions do clients attend, on average? How many sessions and clients are there for each case, on average? * What does this overview of our organisation tell us? Have there been changes over time? Do we need to make adjustments to our service delivery model? |
| Main filters: |  |
|  | * Reporting period * Client type * Program activity * Delivery organisation / Outlets |

Table 1 – Sheet information for the Organisation overview report

| Sheets: | Measures / Notes: | Displays: |
| --- | --- | --- |
| User guide & filters page | * Report purpose and main features * Filters | Lists |
| Attendance and sessions | * Total number of clients, and monthly details for each client type: individual clients, group clients and support persons * Total number of sessions and monthly attendance by client type * Average session and case information * Monthly number of cases | Bar and scatter charts |
| Service Summary | * Attendances per month of the year * Attendances per day of the week * Individual clients and support persons by exit reason * Attendance per service setting * Attendance per profile * Attendance by interpreter present | Bar charts |
| Organisation summary | * Organisation outlets by name, state, activity * Clients by type, attendances, sessions and cases | Table |
| Activity | * Clients, group clients and support persons by activity * Sessions by service type | Bar and scatter charts |
| Service type | * Number of sessions by service type | Bar chart |
| Client Trends | Clients and support persons over time by:   * Reporting period and client type * Month and client type | Line charts |
| Client demographics | Individual clients and support persons by:   * Age group * Gender * Indigenous status * Disability status | Bar chart and pie charts |
| Extended Demographics | Individual clients and support persons by   * highest level of education * NDIS eligibility status * employment status * is client a carer flag | Bar charts |
| Demographics – CALD | Individual clients and support persons by:   * CALD status * Country of birth * Main language spoken at home | Pie charts and tables |
| Ancestry and migration | Individual clients and support persons by:   * Ancestry * Migration visa * By years in Australia | Pie chart, bar charts and table |
| Home situation | Individual clients and support persons by:   * Homeless indicator * Annual income * Household composition * Income source | Table and bar charts |
| Demographic Trends | Individual client per reporting period by:   * Gender * % gender * CALD status * % CALD status * Indigenous status * % Indigenous status * Disability status * % disability status * Disability type * % disability type | Line charts |
| Referrals | Individual clients and support persons by:   * Referral origin * Reason for seeking assistance * External versus internal referrals * Referral reason | Bar charts |
| Outlet state | Individual/group clients and support persons by:   * Session attendance and state where the outlet is located * State summary by organisation, outlet, client type and support persons | Bar chart and table |
| NDAP activity (if applicable) | * Number of sessions and clients by service type * Number of sessions by NDAP topic and service type | Table and bar chart |
| Attorney General’s Department (if applicable) | * Fees charged/client contribution by activity, delivery organisation and outlet * Number of sessions by parenting agreement and legal help * Clients issued certificates by certificate type, and by quarter | Table, bar charts and pie chart |
| Education and skills training (if applicable) | Money workshops :   * Sessions and attendances by topic and client types for each workshop | Table and bar chart |
| Information page | * Glossary of terms used, grouped by category * Version history, with details of document changes | Lists |

For all Data Exchange reports, there is additional user guidance available on the Data Exchange [website](https://dex.dss.gov.au/) (https://dex.dss.gov.au/).