
Steven Vella
Gail Fuller
Michael Mitchell
Catherine Allan
Oliver Burmeister
Automated process to create snapshot reports based on the 2016 Murray Community-based Groups Capacity Survey

User Guide

Steven Vella, Gail Fuller, Michael Mitchell, Catherine Allan and Oliver Burmeister

Institute for Land, Water and Society,
Charles Sturt University

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Readings and requirements

Additional reading material

- Murray Region Community-Based Groups Capacity Needs Assessment: Results of the 2016-2017 Baseline Survey for Murray Local Land Services

Requirements

User:

- Excel experience - Intermediate level

System:

1. Microsoft Office 365
   - Microsoft Excel (with Visual Basic Macros enabled),
   - Outlook* - to send requests and snapshot reports and
   - Word* - to read the User Guide
2. User permissions policy - to modify Microsoft Excel settings
3. Windows File Explorer* - to navigate the file system and extract files from archive (.zip) files
4. Adobe Acrobat Reader* - to view snapshot reports
5. Shared User Data Folder – to store the Excel Workbook and reports

(* or the equivalent where required)
Introduction

As part of the inaugural 2016 Murray Community-based Groups Capacity Survey, each group completing the survey was provided with a snapshot report of their results. The process to create these reports has been automated, and this User Guide explains this process. The process will allow those who administer the survey in the future to easily create snapshot reports similar to those created for the 2016 survey. The reports are created from responses groups provide using the online SurveyMonkey version of the survey. This User Guide is based on the 2016 version of the survey, with two minor modifications to ensure all questions suit the automated process. It is possible to adapt the automated process if further changes to the survey are required.

The process for creating the snapshot reports requires installation of a specially created Microsoft Excel Workbook (workbook). This User Guide describes the process for installing and using the workbook through the following four sections:

- How to access and install the workbook
- How to request and migrate data into the workbook
- How to use the workbook to create and send snapshot reports
- Notes for future application of the workbook

The Appendix lists the two questions from the inaugural 2016 survey that required modification for automation and the reference data used for calculations and conversions to assist with analysis.

It is important to note that the snapshot reports come in two forms:

1. Shows the results for a group once the representative of a group has completed the online survey. This form of the report is specific to the group in question (Figure 1).

   Figure 1: Graphical representation of Human Capital for a group

2. Shows the group’s responses compared with the average of all groups who have completed the survey. MLLS can only create these reports after all groups have completed their responses to the survey for that survey period (Figure 2).

   Figure 2: Graphical representation of Human Capital for a group compared to the average of all groups

The capability for Murray Local Land Services (MLLS) to conduct, analyse and produce reports during the 2016 Community-Based Group Capacity survey was developed by Charles Sturt University (CSU). The survey and its data were managed by CSU’s Spatial Data Analysis Network (SPAN) team using the SurveyMonkey platform.
Access and install workbook

The workbook for automatically generating snapshot reports is an Excel file that needs to be saved and set up once before it can be used with data (Figure 3). In short, MLLS:

- Receives the workbook as an email attachment.
- Saves the workbook to a current folder and a copy to an archive folder (as a back-up).
- Then opens and initialises the workbook ready for use.

Figure 3: Installing the workbook

Note: If more than one person needs to run the workbook, save it to a shared folder where all persons can open and run the workbook as well as save the pdf output of the reports.

Important information regarding Excel Macros

To generate snapshot reports the workbook needs to run Excel macros. A macro is a procedure that can be programmed to automate a repetitive task in Excel. Consequently, it is important to:

- know both the name of the workbook, so it can be saved and located, and the file extension that indicates it is an Excel Workbook with Macros; and
- know and change the settings to allow features needed for the macros to run.

These are described below.

Workbook name

The workbook used to generate snapshot reports is named:

- 2016 Community-Based Group Capacity Workbook.xlsm

Workbook name extension

The extension .xlsm in the name indicates the Excel (xls) workbook also has Macros in it.

Initialise the Excel Workbook

Enable Macros

By default, macros are turned off to prevent them reading data, carrying out actions and changing settings that ought not to be read, carried out or changed respectively. This workbook however needs to run macros to create and save snapshot reports. Users are asked to enable macros when the file is opened. Click the “Enable Content” button (or its equivalent) to allow macros to run (Figure 4).

Figure 4: Warning that Macros are disabled with the option to enable them
Turn on Trust settings for Macros

In addition to macros, the workbook also needs other features for creating the snapshot reports. These are authorised by modifying the following Trust setting:

Choose File->Options->Trust Center-> Trust Center Settings -> Macro Settings then, check the checkbox: Trust access to the VBA project object model.

These steps are shown as steps 1 to 5 in Table 1 below.

Table 1: Steps to change required Trust settings

<table>
<thead>
<tr>
<th>Steps to change needed features</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>File Home</td>
</tr>
<tr>
<td>2</td>
<td>Account</td>
</tr>
<tr>
<td>3</td>
<td>Options</td>
</tr>
<tr>
<td>4</td>
<td>Trust Center</td>
</tr>
<tr>
<td>5</td>
<td>Macro Settings</td>
</tr>
</tbody>
</table>
Download and migrate survey data

Data for the workbook is stored in a SurveyMonkey account managed by CSU’s Spatial Data Analysis Network (SPAN). This section describes the steps needed to request fresh data and place it into the workbook.

Timing
When a snapshot report is run, the report is generated from survey data stored in the workbook. The stored data is loaded from SurveyMonkey. Migrate the data when new groups complete the survey, that is:

- while the survey is open, transfer the data from SurveyMonkey to the workbook as each group answers the survey, or at an agreed regular interval
- once all groups have been surveyed, and answers for all groups are migrated, data migration can cease. Snapshot reports can be run without having to download new data.

Download data from SurveyMonkey
Log onto SurveyMonkey and select the correct survey from the ‘My Surveys’ menu. Once your survey summary opens, select the following options (Figure 5):

1. click ‘Analyze Results’ tab
2. select ‘Exports’ from the left panel
3. click the drop-down arrow and select ‘All individual responses’.

Choose further options in the ‘Export Survey Data’ window (Figure 6):

4. Click ‘All responses data’ tab
5. Click the XLS+ file format option.
6. Select the ‘Complete View’ button for all survey data or select ‘Current View’ for a subset of the data.
7. Name the file or accept the default name and click ‘EXPORT’.

A message will appear on your browser once the file is ready for download (e.g. depending on the browser, at the top right or bottom left of the window). Click ‘Download’ and an archive (.zip) file of the exported data will be available in the Downloads folder on your computer.
Filters. To download a subset of data

Data can be limited to a subset of interest, e.g. data for one specific group or responses to a question, prior to downloading. To do this, click on CURRENT VIEW in the left panel after step 1, then select + Filter and choose the relevant filter from the options listed. Once the filter is applied, repeat Steps 4 to 7 above to download the subset of data.

Extract the data file

Use Windows File Explorer to locate and open the archive file. Copy the “2016 Community-Based Group Capacity Survey for the Murray region.xlsx” (Figure 7) and then paste it into the same location as the Capacity workbook.
Clean the data
To use automated procedures to load data and generate reports, human interaction is needed to clean the data. Cleaning the data requires two steps: format the headings and modify data. Follow the steps listed below to do these.

Format headings
Headings assist automated processes in the Capacity Workbook.

1. Open the data file. If it opens in protected view, click the Enable Editing button (Figure 8).

![Figure 8: Data file opened in protected view. The Enable Editing button appears at the top of the screen.](image)

2. Right click Row 3 and insert a row (Figure 9).

![Figure 9: Insert a new line in Row 3](image)

3. Copy the formula text


   and paste it into cell A3.

   **Note:** Use the option, “Match Destination Formatting” (Figure 10).

![Figure 10: Paste formula into Cell A3](image)
4. Drag the formula in Cell A3 across Row 3 for all columns with data in them. For example, in Figure 11, between B3 and CP3. Note: Headings with data in it are shaded grey.

5. Insert a new row in Row 4.

6. Copy Row 3 and paste its values into Row 4.

**Note:** Use the option, “Values” (Figure 12).

7. Save changes. Optionally, Save As a new file when auditing versions is useful.

Modify data in the data file
To ensure the data is accurate, valid and useable add, change or remove content in the data file before loading it into the workbook.

**Note:** Record and reapply changes for each upload to ensure reports remain the same.

1. Open, or continue editing, the data file.
2. In controlled circumstances, modify the data:
   a. Insert new (late) answers e.g. instead of deleting the previous data file
   b. Remove duplicate or incomplete answers caused by system interruptions
   c. Correct answers e.g. Incorrect group names
3. Save changes. Optionally, Save As a new file when version audits are useful.
Load new data into the workbook

When the headings and data are finalised, i.e. cleaned, in the data file, copy and paste the data to the workbook.

Copy and paste clean data

Open the workbook

1. Locate and open “2016 Community-Based Group Capacity Workbook.xlsm” (Figure 13).

![Figure 13: The front page of the Capacity Workbook](image)

Go to the data file and select all survey answers (Figure 14)

2. Press <Ctrl> + Home
3. Click and Select Cell A4
4. Press <Ctrl> + <Shift> + <End>
5. Press <Ctrl> + <C>

![Figure 14: Select all data between Cell A4 and <Ctrl>+<Shift>+</End>](image)

Return to the Capacity Workbook and run the process to load the data

6. Click Load Survey Data (Figure 15)

![Figure 15: Click the Load Survey Data button to load copied data into the workbook](image)
7. Enter Y and click OK if the data appears to have been pasted correctly behind the dialogue box (Figure 16).

Any other answer (including 'Y or N') will cancel the process and require starting again.

8. Warnings of questions not found in the data file are displayed (Figure 17).

Note them and if required modify them in the Reference Worksheet (Appendix A).

Click the OK button

9. The data is now ready to generate Snapshot reports.
Create and send snapshot reports

Receive a report request

After a group completes their survey a Community-based Group Capacity survey, they can notify MLLS to send their report. While the survey is open, MLLS can send snapshot reports that only show results for the Group requesting their report. Once answers for all Groups have been collected, reports can be sent that compare the Group results with the average of all Groups (Figure 18).

An example email request for a report update:

The contact person for MLLS is:
- Sandy Dellwo, Acting Senior Land Services Officer. Email: sandy.dellwo@lls.nsw.gov.au

From: Representative, Group
To: Dellwo, Sandy <sandy.dellwo@lls.nsw.gov.au>
Subject: REQUEST – Please send a Capacity Snapshot report for Group (name)

This email has been sent to request a Capacity Snapshot report for Group (name). Please send the report accordingly. Thank you.

Open the workbook and select the Group

1. Locate and open “2016 Community-Based Group Capacity Workbook.xlsx” (Figure 19).
2. Select and click the Group requesting their report from the pull-down menu (Figure 20)

**Instructions**

*View snapshots*

1. Select Group
2. Click “Snapshot” or “Compare with all”

*Load new data*

1. Open the Survey data file and clean the data
2. Select the data (between Cell A4 and <Ctrl>)
3. Click “Load survey data”

Figure 20: Select and click the Group required

Generate the snapshot report with/without the Group average

1. Click the required button (Figure 21)
   a. ‘Snapshot’ to generate the Snapshot report for a group
   b. ‘Compare with all’ to generate the Snapshot report with the average of all groups

Figure 21: Click the relevant button to generate a snapshot report

2. Wait. A print message will be shown during progress (Figure 22).

Figure 22: The print message showing the report progress

3. The report will be displayed in Adobe Acrobat Reader or equivalent (Figure 23). Instructions for reading the report are outlined on Page 1.

Figure 23: Snapshot report a) Page 1, b) Page 2 and c) Page 2 with values compared to the average of all groups
To send the snapshot report

1. Choose the ‘Attach to Email’ from the File -> ‘Send File’ menu (Figure 24).

![Figure 24: Menu selection to send the Snapshot report](image)

2. Select the default email app by clicking Continue, or to select an alternative email app click Change Preferences and follow the prompts (Figure 25).

![Figure 25: Warning dialogue to use the default email application or its alternative](image)

3. When the email application opens, the Capacity Snapshot report will be attached. Fill in the Sender, Receiver, Subject and email Content as required (Figure 26) and click Send.

![Figure 26: Email to be sent with Capacity report attached](image)

4. The Capacity Snapshot for the Group is now sent.
Notes for future application of the workbook

For MLLS to take over the Survey collection:

- CSU can transfer the collector to an MLLS SurveyMonkey account and
- MLLS can use the current snapshot Workbook.

Reports can be automated further by

Option 1: Connecting the Excel Workbook to SurveyMonkey directly by using

- SurveyMonkey for Excel, https://www.officereports.com/ or their equivalent
- A user subscription on SurveyMonkey that allows teams and collaborators and controls permissions to prevent access to other data

Option 2: developing a web interface that generates and displays the report online when a Group completes a survey.

- Requires web hosting
- An API to access SurveyMonkey data
- Graphing APIs that can display Radar charts.
  - anychart https://docs.anychart.com/Basic_Charts/Radar_Plot/Overview
  - rchart (https://www.rgraph.net/canvas/docs/radar.html)

The survey can be modified to gain further insight for each Group Capacity by:

- Updating questions to gather information more accurately and efficiently
- Gathering longitudinal data that allow analysis over time for each group and
- Updating reports and automated processes to gain further insight from answers and historical data
Appendix A: New questions and reference data used

New questions

To enable the process to be automated for all questions, two new questions were added to the original 2016 version of the survey. The original survey required complex calculations from the existing questions to offer groups with a snapshot result related to access to funds and project managers. Two simpler questions were added:

1. During the past 12 months, did your group employ a full or part-time project manager? (The score for this question is combined with the existing question: During the past 12 months, did your group have access to a full or part-time project manager employed by another organisation?)

2. In general, how easy has it been for your group to access funds to support the activities you have undertaken over the past 3 years? (This question is used in place of the question where ease of access to funds is answered separately according to different items.)

Reference data and calculations

The Workbook macros refer to set data to create the reports. The reference data is presented here.

1. Survey answers as numerical values.

<table>
<thead>
<tr>
<th>Answer</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>BLANK</td>
</tr>
<tr>
<td>Agree</td>
<td>6</td>
</tr>
<tr>
<td>Difficult</td>
<td>2</td>
</tr>
<tr>
<td>Disagree</td>
<td>2</td>
</tr>
<tr>
<td>Easy</td>
<td>4</td>
</tr>
<tr>
<td>Moderate</td>
<td>3</td>
</tr>
<tr>
<td>No</td>
<td>0</td>
</tr>
<tr>
<td>Somewhat Agree</td>
<td>5</td>
</tr>
<tr>
<td>Somewhat Disagree</td>
<td>3</td>
</tr>
<tr>
<td>Strongly Agree</td>
<td>7</td>
</tr>
<tr>
<td>Strongly Disagree</td>
<td>1</td>
</tr>
<tr>
<td>Undecided</td>
<td>4</td>
</tr>
<tr>
<td>Very difficult</td>
<td>1</td>
</tr>
<tr>
<td>Very easy</td>
<td>5</td>
</tr>
<tr>
<td>Yes</td>
<td>1</td>
</tr>
<tr>
<td>Yes, and the plan is current</td>
<td>2</td>
</tr>
<tr>
<td>Yes, but the plan is not current</td>
<td>1</td>
</tr>
</tbody>
</table>

2. Title for rows added to store Group totals

<table>
<thead>
<tr>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>TitleTotals</td>
</tr>
<tr>
<td>N</td>
</tr>
<tr>
<td>All Groups Average</td>
</tr>
</tbody>
</table>
3. **Headers for columns added to store capital type totals**

<table>
<thead>
<tr>
<th>Capital Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>CapitalTotals</td>
</tr>
<tr>
<td>Group name</td>
</tr>
<tr>
<td>Human</td>
</tr>
<tr>
<td>BondingSocial</td>
</tr>
<tr>
<td>BridgingSocial</td>
</tr>
<tr>
<td>Organisational</td>
</tr>
<tr>
<td>Physical and Financial</td>
</tr>
</tbody>
</table>

4. **Survey questions, displayed text, score values, capital type and sort order**

<table>
<thead>
<tr>
<th>Grouped Questions</th>
<th>QuestionDisplay</th>
<th>Maximum Score</th>
<th>Capital type</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the current name of your group? - Open-Ended Response</td>
<td>Group name</td>
<td>Maximum Score</td>
<td>Capital type</td>
<td>Order</td>
</tr>
<tr>
<td>Our group can easily fill positions of responsibility from among our members</td>
<td>Our group can easily fill positions of responsibility from among our members</td>
<td>7.00</td>
<td>Human</td>
<td>1</td>
</tr>
<tr>
<td>Does your group have a board and/or team of executives with assigned roles (e.g. chair, secretary, treasurer, etc.)?</td>
<td>Does your group have a board and/or team of executives with assigned roles (e.g. chair, secretary, treasurer, etc.)?</td>
<td>1.00</td>
<td>Human</td>
<td>2</td>
</tr>
<tr>
<td>Our group has a good understanding of ways to develop group capacity</td>
<td>Our group has a good understanding of ways to develop group capacity</td>
<td>7.00</td>
<td>Human</td>
<td>3</td>
</tr>
<tr>
<td>Our group provides training to meet our members' needs</td>
<td>Our group provides training to meet our members' needs</td>
<td>7.00</td>
<td>Human</td>
<td>4</td>
</tr>
<tr>
<td>Our group members are usually highly motivated to achieve the group's goals</td>
<td>Our group members are usually highly motivated to achieve the group's goals</td>
<td>7.00</td>
<td>Human</td>
<td>5</td>
</tr>
<tr>
<td>Our group has the necessary skills and experience to do what it wants to do</td>
<td>Our group has the necessary skills and experience to do what it wants to do</td>
<td>7.00</td>
<td>Human</td>
<td>6</td>
</tr>
<tr>
<td>A characteristic of our group is a high level of trust and respect between our members</td>
<td>A characteristic of our group is a high level of trust and respect between our members</td>
<td>7.00</td>
<td>BondingSocial</td>
<td>1</td>
</tr>
<tr>
<td>Grouped Questions</td>
<td>Description</td>
<td>Score</td>
<td>Type</td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------</td>
<td>-------</td>
<td>------</td>
<td></td>
</tr>
<tr>
<td>Our group can make decisions even when there are strong differences of opinion</td>
<td>Our group can make decisions even when there are strong differences of opinion</td>
<td>7.00</td>
<td>BondingSocial 2</td>
<td></td>
</tr>
<tr>
<td>Our group meets often enough to achieve what we want to do</td>
<td>Our group meets often enough to achieve what we want to do</td>
<td>7.00</td>
<td>BondingSocial 3</td>
<td></td>
</tr>
<tr>
<td>Our group has a shared view of its purpose/reason for existing</td>
<td>Our group has a shared view of its purpose/reason for existing</td>
<td>7.00</td>
<td>BondingSocial 4</td>
<td></td>
</tr>
<tr>
<td>Has your group undertaken a visioning exercise with members to establish the group's goals and purposes?</td>
<td>Has your group undertaken a visioning exercise with members to establish the group’s goals and purposes?</td>
<td>1.00</td>
<td>BondingSocial 5</td>
<td></td>
</tr>
<tr>
<td>None of our members have ever felt excluded from key decisions made by our group</td>
<td>None of our members have ever felt excluded from key decisions made by our group</td>
<td>7.00</td>
<td>BridgingSocial 1</td>
<td></td>
</tr>
<tr>
<td>Our group makes it easy for non-members to access our information and expertise</td>
<td>Our group makes it easy for non-members to access our information and expertise</td>
<td>7.00</td>
<td>BridgingSocial 2</td>
<td></td>
</tr>
<tr>
<td>Our group targets influential people at regional, state and/or national levels</td>
<td>Our group targets influential people at regional, state and/or national levels</td>
<td>7.00</td>
<td>BridgingSocial 3</td>
<td></td>
</tr>
<tr>
<td>Our group knows where to get the knowledge, skills and resources we need</td>
<td>Our group knows where to get the knowledge, skills and resources we need</td>
<td>7.00</td>
<td>BridgingSocial 4</td>
<td></td>
</tr>
<tr>
<td>Our group often shares information and ideas with other similar groups</td>
<td>Our group often shares information and ideas with other similar groups</td>
<td>7.00</td>
<td>BridgingSocial 5</td>
<td></td>
</tr>
<tr>
<td>Is your group part of a formal network or a relationship based collective?</td>
<td>Is your group part of a formal network or a relationship based collective?</td>
<td>1.00</td>
<td>BridgingSocial 6</td>
<td></td>
</tr>
<tr>
<td>Our group influences people in our community beyond our membership</td>
<td>Our group influences people in our community beyond our membership</td>
<td>7.00</td>
<td>BridgingSocial 7</td>
<td></td>
</tr>
<tr>
<td>Our group is satisfied by our community’s level of participation in activities we undertake</td>
<td>Our group is satisfied by our community’s level of participation in activities we undertake</td>
<td>7.00</td>
<td>BridgingSocial 8</td>
<td></td>
</tr>
<tr>
<td>Our group has a high level of engagement with our community</td>
<td>Our group has a high level of engagement with our community</td>
<td>7.00</td>
<td>BridgingSocial 9</td>
<td></td>
</tr>
<tr>
<td>Grouped Questions</td>
<td>Composite Score</td>
<td>Organisational</td>
<td>Composite Score</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>-----------------</td>
<td>----------------</td>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td>Those who take on responsibilities in our group are given clear instructions about what they are responsible for doing</td>
<td>7.00</td>
<td>Organisational</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>NEW Does your group employ or have access to a project manager? (Composite score)</td>
<td>1.00</td>
<td>Organisational</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Are minutes of the meetings recorded and made available to members?</td>
<td>1.00</td>
<td>Organisational</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Our members often share information and ideas with other members in our group</td>
<td>7.00</td>
<td>Organisational</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Our group always gets feedback from those with an interest in our group on what they think of our group and its activities</td>
<td>7.00</td>
<td>Organisational</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Our group always takes action to address aspects of its performance that need improving</td>
<td>7.00</td>
<td>Organisational</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Does your group regularly monitor performance against the strategic plan?</td>
<td>1.00</td>
<td>Organisational</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Our group checks that our strategic direction matches our members' priorities</td>
<td>7.00</td>
<td>Organisational</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Does your group have a strategic plan?</td>
<td>2.00</td>
<td>Organisational</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>Our group has adequate physical infrastructure and equipment to support the activities we undertake</td>
<td>7.00</td>
<td>Physical and Financial</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Grouped Questions</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>NEW Over the past 3 years, how easy has it been for your group to access funds for the following items: on ground consumables, staff, events (Composite score)</td>
<td>NEW Over the past 3 years, how easy has it been for your group to access funds for the following items: on ground consumables, staff, events (Composite score)</td>
<td>5.00</td>
<td>Physical and Financial</td>
<td>2</td>
</tr>
</tbody>
</table>