Creating Surveys & Assessments

Welcome, we will start shortly!

Bonterra™

Meet Your Trainer

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Learning Objective

By the end of this session, our goal is to arm you with different ways to create and share Surveys and Assessments with your key audiences so you can collect actionable insights.

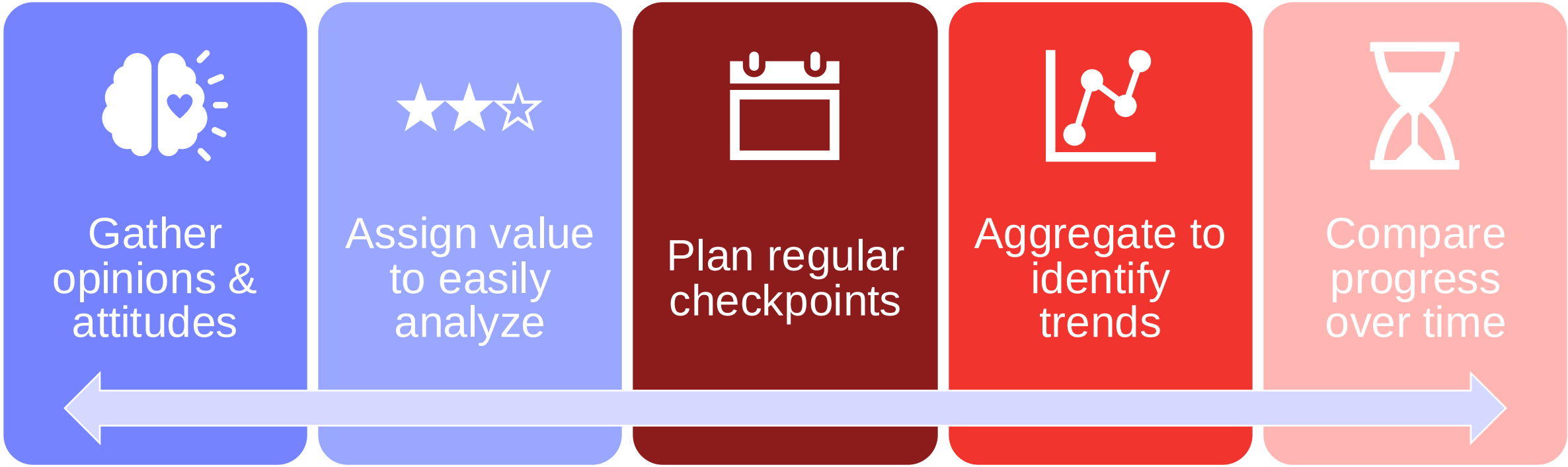
Agenda

- Overview
- Components
- Sharing Options
- How to Build

Overview

Surveys & Assessments

Opportunity to turn **Qualitative** data into **Quantitative** insights.



How to Use Surveys & Assessments

Participants

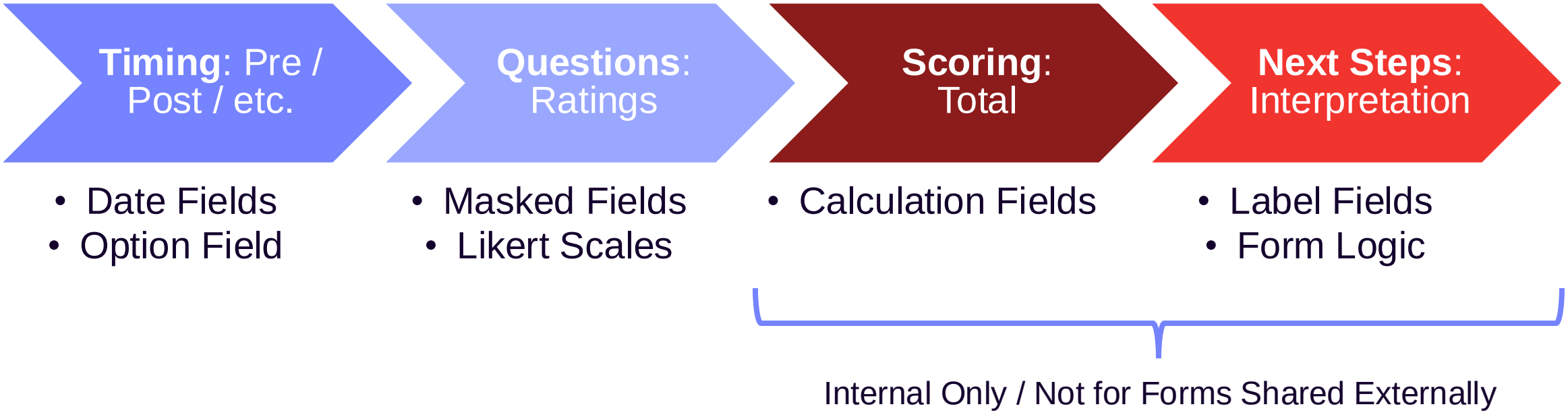
- Behavioral Assessments
- Skills Assessments
- Mental Health Evaluations
- Risk Assessments
- Needs Survey
- Post-Program Check Ins

Staff / Volunteers / Donors

- Opinion Surveys
- Interest Assessments

Components

Components


Timing: Pre / Post / etc.
Questions: Ratings
Scoring: Total
Next Steps: Interpretation
• Date Fields
• Option Field
• Masked Fields
• Likert Scales
• Calculation Fields
• Label Fields
• Form Logic
Internal Only / Not for Forms Shared Externally

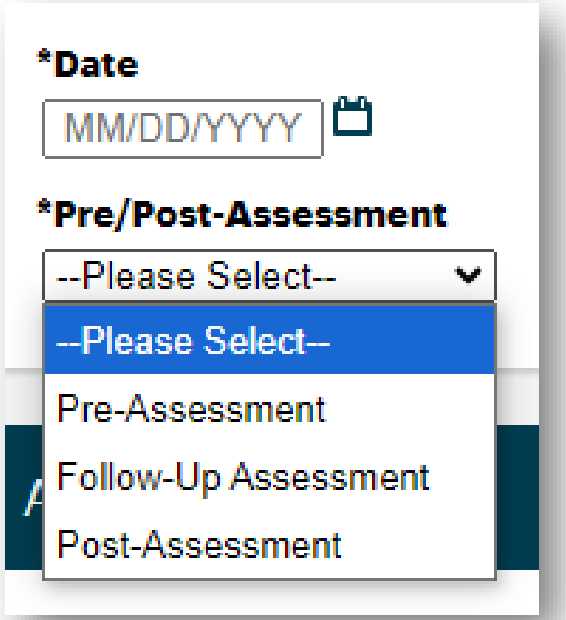
Components: Timing

Date & Option Field

- Important to capture date of survey or assessment.

- Can also categorize time of assessment:
  - Pre / Post / Follow-Up
  - 30 Day / 60 Day / 90 Day

- Creation Date can also come into play for reporting.

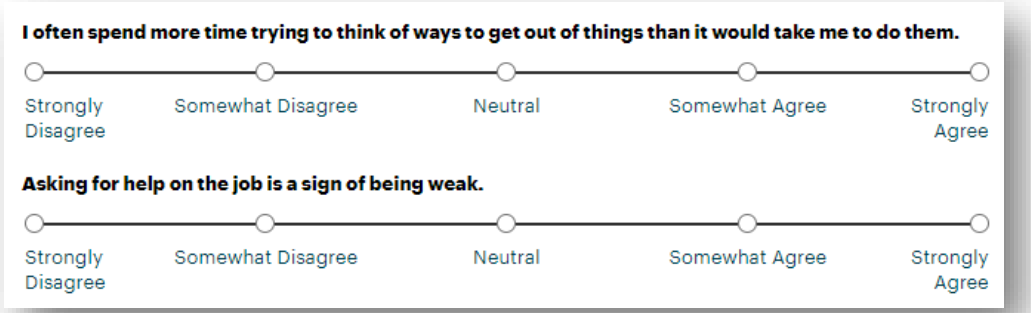


Components: Questions

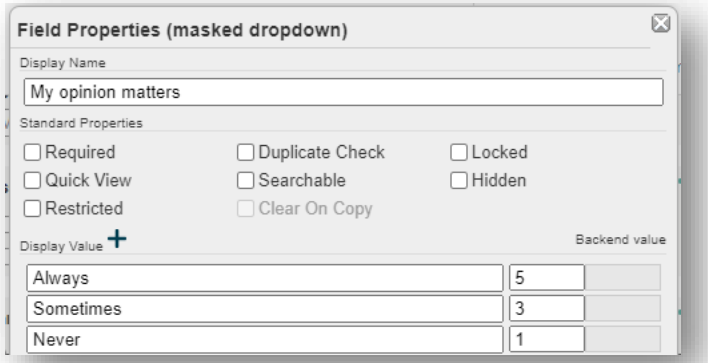
Weighted Option Fields

- Ability to assign hidden values to answer choices to quantify the options.
- Commonly used for rating scales with values assigned based on preferred choice(s).
- Remember to keep values / directionality the same to make scoring accurate.

Likert Scale



Masked Dropdown or Radio Button



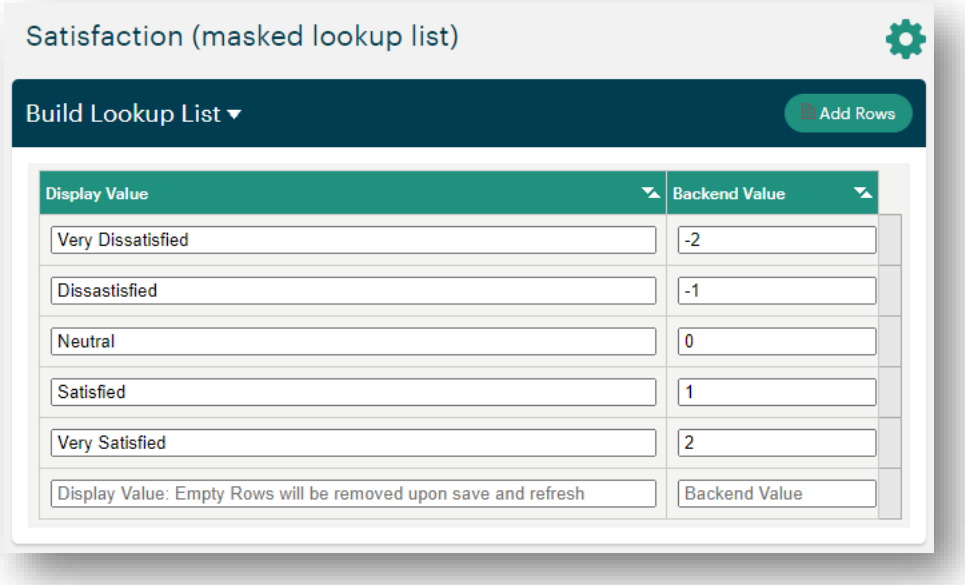
Components: Questions

Masked Lookup Lists

- Consider creating common scales to reuse for time savings & consistency.
- Recommend 3-5 rating points along each scale (including Neutral or N/A).

Examples:

- Dissatisfied to Satisfied
- Poor to Best Performance
- Disagree to Agree
- Not Likely to Very Likely

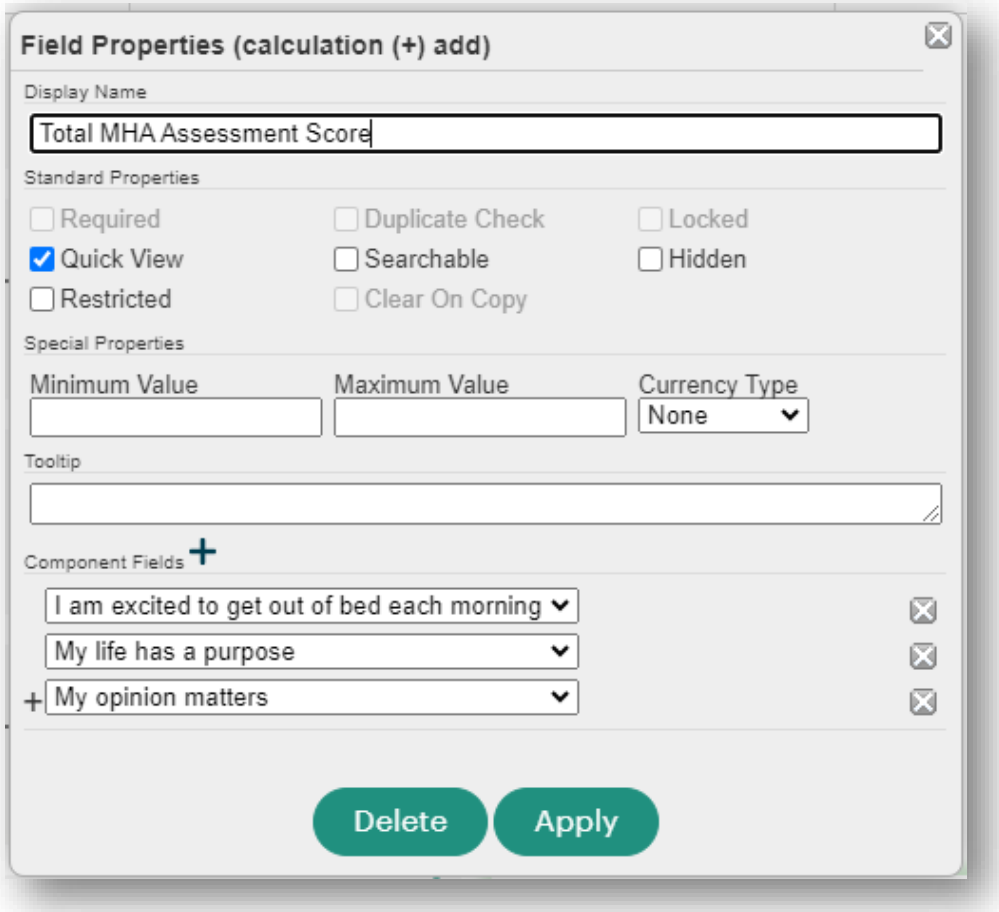


Components: Scoring

Calculation Fields

- Have Apricot total up backend values for score.
- Again, consistency in direction of values is key.
- Other calculations are possible, but require one Calculation field per operation (+ - x ÷).
- Can hide steps & show only end result if applicable.

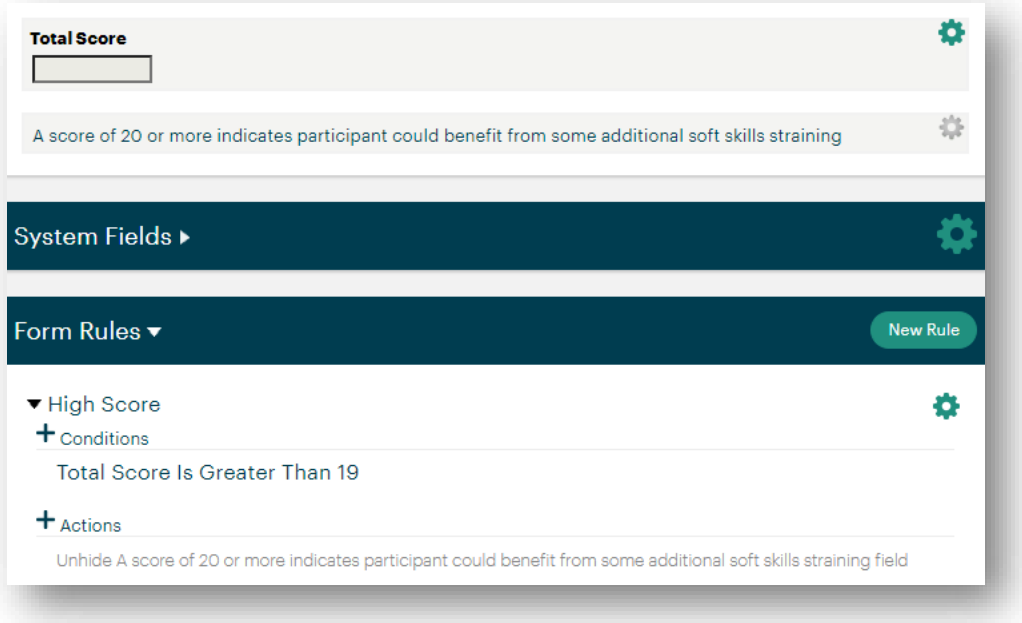
Note: Calculation Fields are not supported with Connect or Intake; When sharing Surveys or Assessments via these tools, calculations must be done in reporting.



Components: Next Steps

Label Field & Form Logic

- Ability to provide instructions to staff based on score.
- Create hidden Label fields based on different outcomes.
- Use Form Logic to unhide based on calculated score.



Sharing Options

Sharing Options

How you plan to share these forms determines the best configuration.

Face-to-Face – Tier 2 Form

Anonymous Surveys – Tier 1 Intake Form

Virtual Assessments – Connect & Direct Messages

How to Build

Face-to-Face: Tier 2 Form

- To be filled out by staff when meeting with a Participant.
- Recommend Tier 2 form in Participant Document Folder.
- Can include Calculation & internal notes to qualify the score.

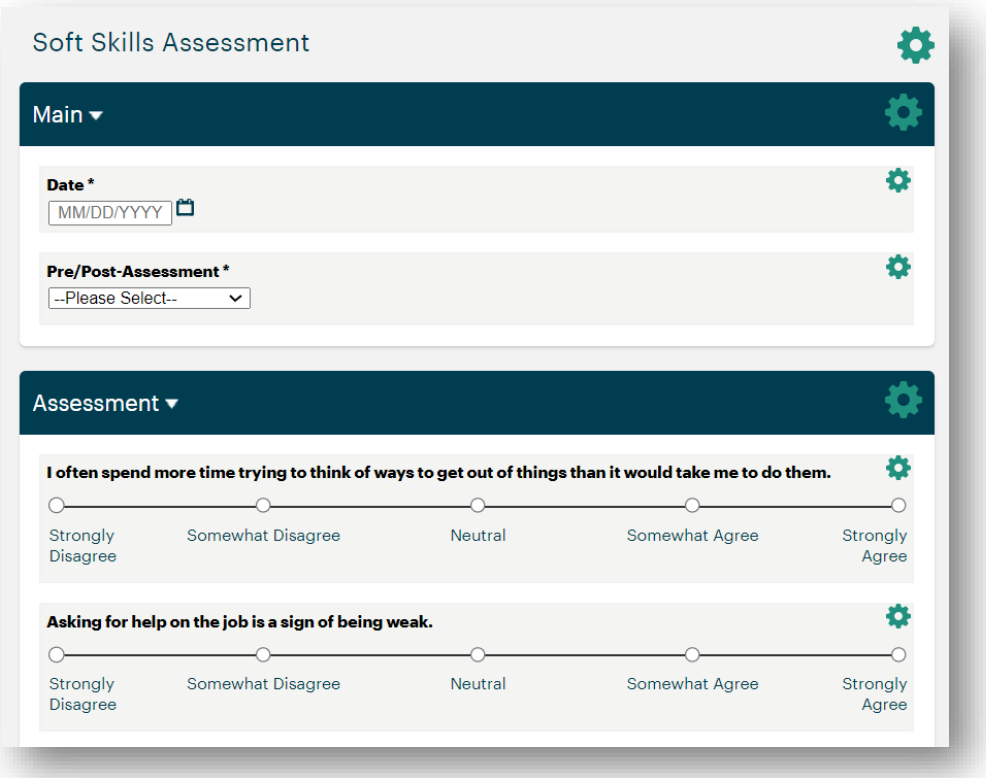
Step 1: Build New Tier 2 from Scratch.

Step 2: Add Masked Option Fields.

Step 3: Add Score Calculations.

Step 4: Add Instruction Label Field(s).

Step 5: Publish for use.



Anonymous Surveys: Tier 1 Intake Form

- To be shared externally & filled out without capturing name.
- Recommend Intake Form based on Survey Tier 1.
- Cannot include Calculation or internal notes.

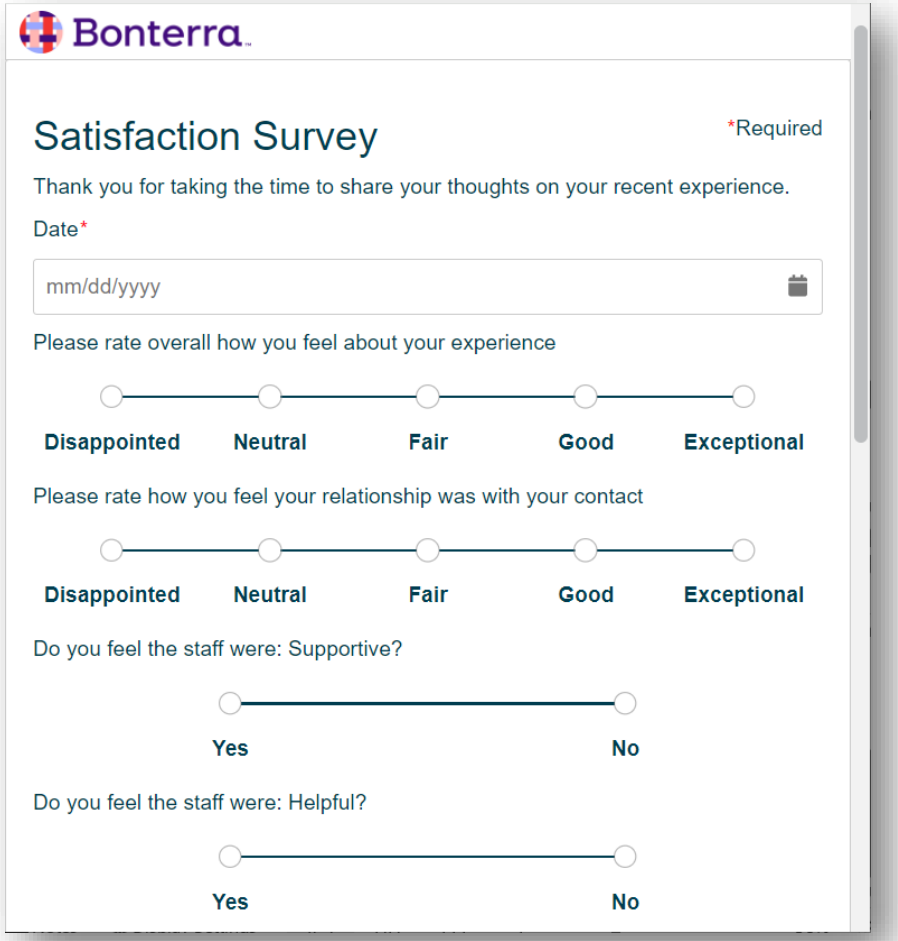
Step 1: Build New Tier 1 from Scratch.

Step 2: Add Masked Option Fields.

Step 3: Create Intake Form Version.

Step 4: Publish & Share Link.

Step 5: Use Report to Calculate Score.



Virtual Assessments: Connect & Direct Messages

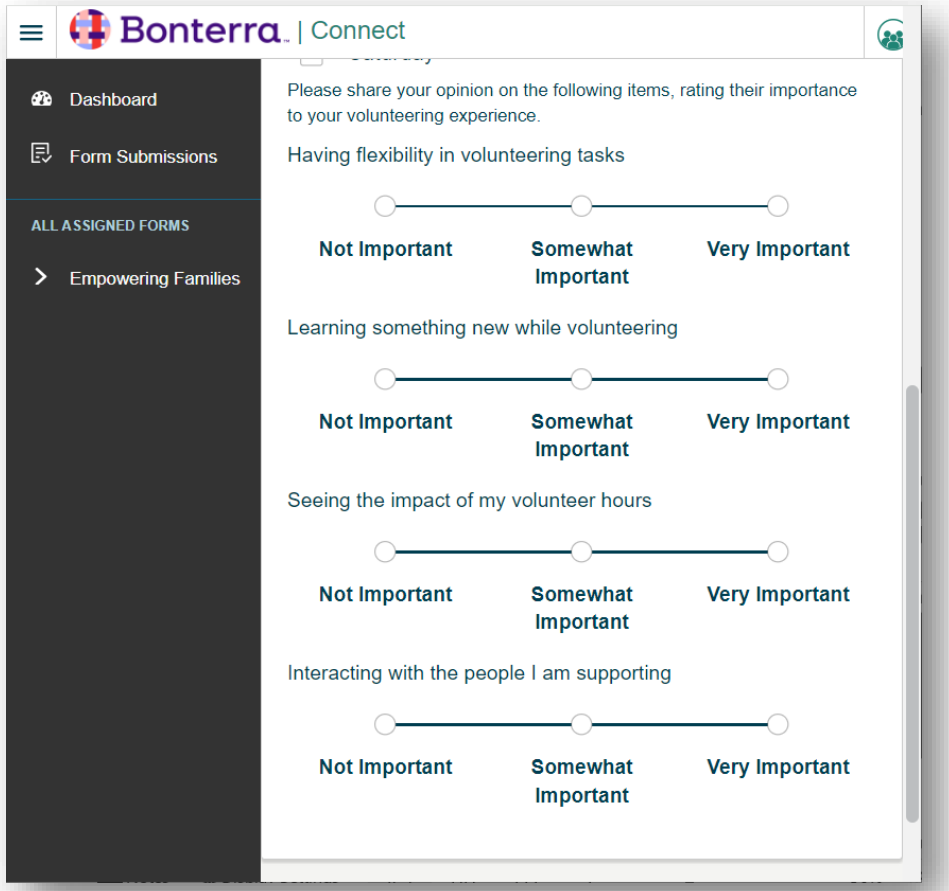
- To be shared externally in Connect Portal or vis Direct Message.
- Recommend Tier 2 form in Participant Document Folder.
- Cannot include Calculation or internal notes.

Step 1: Build New Tier 2 from Scratch.

Step 2: Add Masked Option Fields.

Step 3: Publish & Share via Connect or Message.

Step 4: Use Report to Calculate Score.



Additional Resources

Additional Training Opportunities

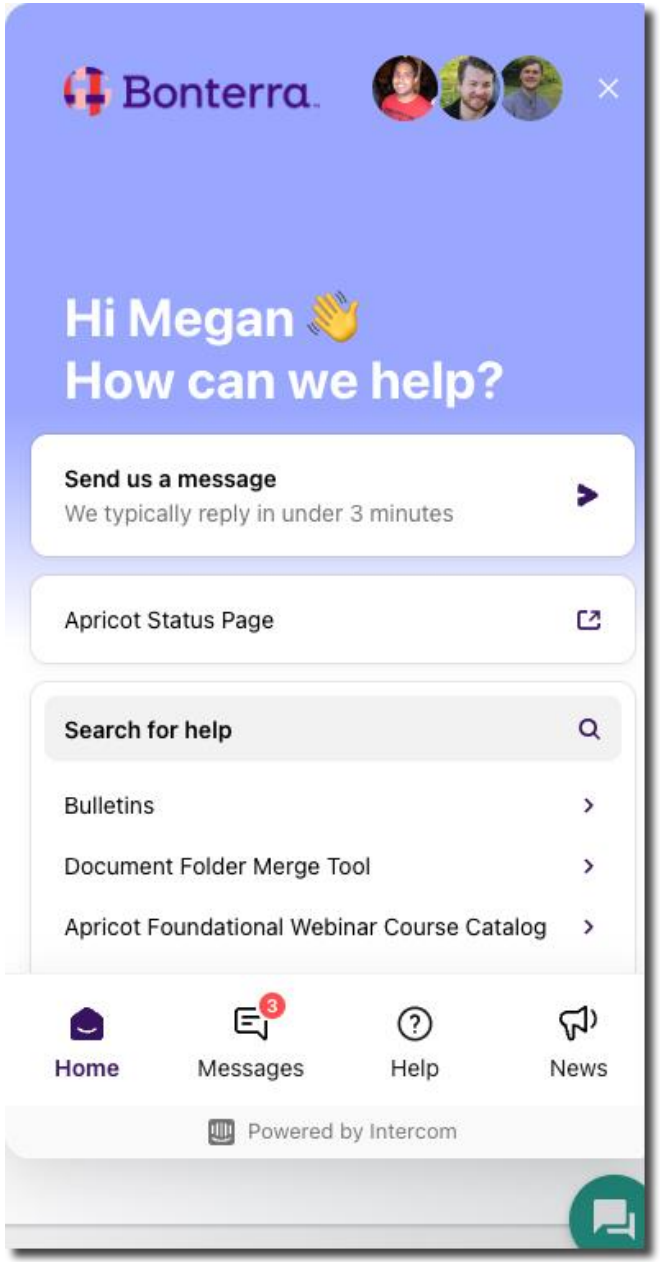
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

Build confidence & knowledge in our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: apricot@bonterratech.com



Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!

Thank you for attending!

We hope to see you
in future trainings.

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