1.5.7 Writing an Annual Assessment Report

by   Kelli Parmley (Director of OBIA, University of Northern Colorado) and Daniel K. Apple (President and Founder, Pacific Crest)

An annual assessment report is a mechanism that can sustain attention to continuous quality improvement and demonstrate one's accountability for external audiences. Once a quality assessment system is designed, the challenge for program participants is getting started. This module clarifies the purposes and uses of an annual assessment report and identifies a template for an annual assessment report.

Purposes and Uses for an Annual Assessment Report

Assessment systems have two chief purposes, improvement and evaluation. While the use of information for these two purposes requires a distinctly different mindset (*4.1.2 Distinctions Between Assessment and Evaluation*), the process of measuring, recording, and reporting of information is common to both assessment and evaluation. An annual assessment report is a framework for reporting information for both improvement and evaluation. In the case of assessment, reported information is used to provide constructive feedback for purposes of improvement. In the case of evaluation, performance is compared against a standard and the results are permanently and publicly recorded.

An annual assessment report serves two additional and important purposes. Since the intended audiences are key program stakeholders, the report can be used to communicate with them about other processes such as budgeting, planning, recruiting, and fund raising. Note that in the case of an academic program, there might be multiple stakeholders such as students, faculty, alumni, and administrators. Secondly, since an assessment system should be regularly assessed to ensure continuous improvement (*1.5.2 Methodology for Designing a Program Assessment System*), the annual assessment report provides the evidence necessary for assessing the assessment system by providing direction for improvement.

Components of an Annual Assessment Report

The report needs to be written with the program's multiple audiences (stakeholders) in mind. Therefore, the physical appearance of the report should be of publication quality (e.g., color, glossy print) similar to other professional annual reports. Table 1 presents a template for an annual assessment report. The following provides greater descriptive detail of components found in the template.

Packaging the Report

Front Cover

The front cover of the report should clearly identify the program title and the year, and it should list the names of the key program contributors (e.g., faculty). Visual imagery that captures the essence of the program and its key processes or products (e.g., pictures, graphics, colors) should compliment this information.

Back Cover

The inside back cover of the annual report should be used to list important activities and events that are planned for the subsequent year such as lecture series, brown bag lunches, and alumni events. The back of the cover should include important contact information for the program (e.g., address, email, phone numbers) and list additional program participants (e.g., student workers, part-time employees, volunteers).

Providing Program Background

Inside Front Cover

The inside cover of the annual report provides important context for the report, and is an important tool for communicating with stakeholders. It should specify the information from the first five steps of the assessment system.

Illustrating Continuous Quality Improvement

Interior Pages

The interior pages should be printed front to back with each side devoted to an area of quality (performance criteria) identified in the "Table of Measures" of an assessment system (*1.5.2 Methodology for Designing a Program Assessment System*). These should be prioritized such that the first and second most important performance areas are captured on the front and back of the first interior page. The subsequent pages should address each of the remaining performance areas. One suggestion is to devote a page to assessment; this provides an opportunity to identify your overall progress in implementing and assessing an assessment system.

Design for a Page

The page for each performance area should be divided to include five elements. These are found in the section "Design for a Page" of Table 1. By including top accomplishments, additional accomplishments, and efforts, those who are responsible for the program are able to convey a great deal of information about quality in that performance area, yet do so in a prioritized fashion. The top accomplishments should be significant contributions to performance in that area of the program. Each of those significant accomplishments should be thoroughly described based on evidence gathered (e.g., the attributes, means for collecting the data, and instrument vehicles in the assessment system). For a program with a newly designed assessment system, strong evidence may not be available, but this does not prevent a program from writing the annual report. Use what evidence is available to describe the strengths of this accomplishment and its contribution to the quality area.

For any particular performance area there are additional accomplishments and efforts. These are less significant than the top accomplishments of the program, but indicate contributions to quality in that area. Descriptions of additional accomplishments should be single sentences, while additional "efforts" should be stated briefly in phrases.

Lastly, each page should also identify short-term and long-term activities and plans for improving the program. In this section, care should be taken to avoid evaluative language and to emphasize opportunities for improvement. Identifying these activities and plans on an annual basis provides a clear linkage from one year to the next. The short-term activities and plans should inform campus operational processes (e.g., budgeting and planning) and should be assessed in the subsequent year's annual report. The long-term activities and plans should inform strategic and program planning processes.

Concluding Thoughts

A quality assessment report can be one of the most valuable activities of the year. It helps the program recount all their accomplishments and provides the basis for direction in the next year. It provides clear documentation to obtain resources, internally, through the budget process and helps to obtain more resources externally through grants and development. An annual assessment report supports the strategic and program planning processes by clearly identifying long-term activities and plans. Lastly, the accreditation and other evaluation processes become much easier because work is done on an annual basis.

Table 1

Template for an Annual Assessment Report

Packaging the Report

Front cover

- Program title
- Slogan/phrase with special meaning
- Year
- Key program contributors
- Images that capture the essence of the program, key processes, and products

Inside back cover

- Schedule of activities and events of interest for the coming year
- Ways to get involved (e.g., open houses, presentations, social activities, celebrations, symposiums)

Back cover

- Contact information (who to contact for informal requests)
- List of program members

Providing Program Background

Inside front cover (carefully crafted for the audience)

- Program essence and scope
- Key features (processes/systems)
- Key assets (products)
- Goals (current and future)

Illustrating Continuous Quality Improvement

Interior pages (front to back)

- First page (immediately following the front cover)—most important performance area
- Second page (back of first page)—second most important performance area
- Subsequent pages—one page for each of the remaining performance areas
- Last page (before back cover)—continuous quality improvement (assessment)

Design for a Page

Performance area (specified at the top of the page)

First page

1. Top two or three accomplishments—paragraph with strong evidence and value articulated
2. Top 10 additional accomplishments—single sentences
3. Additional efforts
4. Planned activities and improvements for next year
5. Strategic plans for the next five years