

How to Write the Annual Report

A Step by Step Process

Pierce County Funders Group



The Three Questions

1. Using 18 months of Outcome data **and** at least one other performance measure; explain the learnings that have occurred in this program using performance measures.
2. Given these lessons (must include outcome data and may include any other performance measures), please describe your plans for the program for the next 6-12 months.
3. What else would you like your funder to know about the effectiveness of your program?

Step 1. Identify the questions

- Brainstorming Questions
 - Management/Board
 - Staff
 - Clients
- What do you really want to know about your program?

Step 2. Identify the Performance Measures

- What performance measures will answer the priority question?
- Resources, outputs, quality and customer service data are all considered performance measures.
- If outcomes are not necessary to answer the question, they are still required to be presented in the Annual Report.

Step 2. Variables

- Variables are used to separate performance measures into two or more discreet groups.
- Measurement Tools
 - Collect outcomes
 - Collect performance measures
 - Collect variables

Step 3. Criteria for Changes

- Set prior to data analysis to remain as unbiased as possible.

Activity 1. Start-up the Worksheet

- Developing an OBE Report Worksheet
 - Identify the priority questions for the OBE report.
 - What data (performance measures) will be required for the OBE report?
 - Establish criteria for making program change.

Annual OBE Report Worksheet

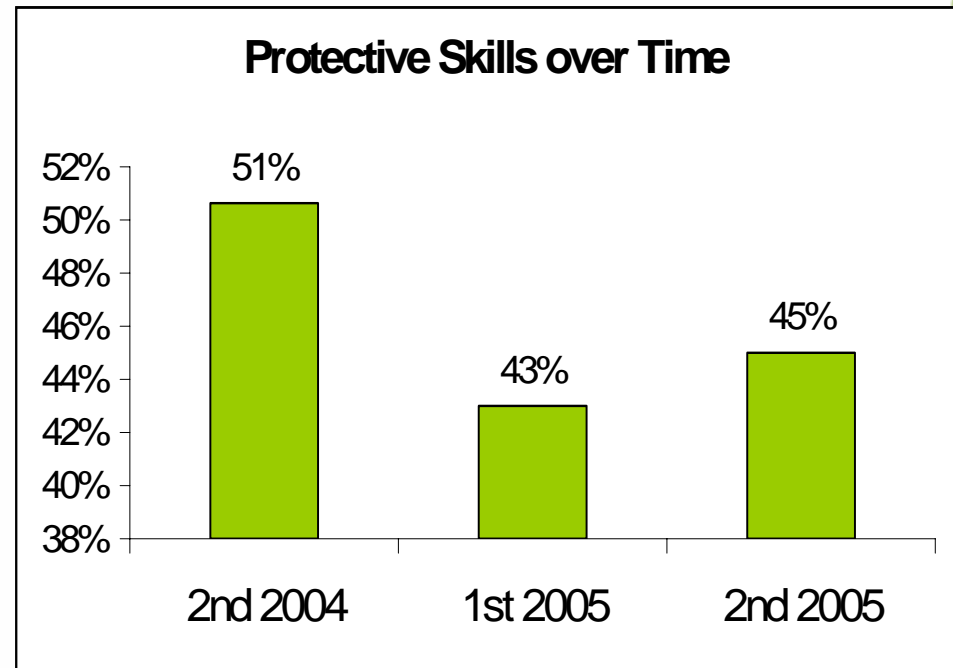
- **Step 1** Identify the priority questions for the OBE report.
 - How are youth represented across the ACE categories?
 - How does the ACE Category impact outcome success?
- **Step 2** What data (performance measures) will be required for the OBE report? Complete the table below.

Data		Performance Measure or Variable	Purpose
ACE Category Prevalence		Performance Measure	Answers Q.1

- **Step 3.** Establish criteria for making program change.
 - Measure 1: Greater than 5% decrease in outcome attainment as ACE category increases.

Step 4. Data Presentation (Outcomes)

- Eighteen months of Outcome data must be presented in the Annual Report.
- Regardless of whether or not outcomes answer the key question(s).

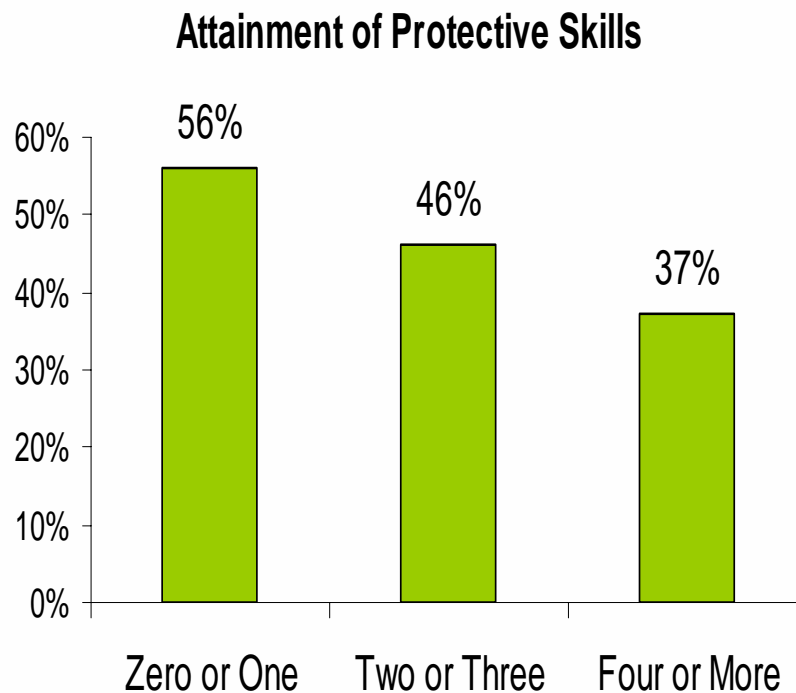


Step 4. Data Presentation (Key Questions)

1. How are youth represented across the ACE categories?

ACE Category	Prevalence
Zero to One	17%
Two or Three	48%
Four or More	35%

2. How does ACE the category impact the success of the outcomes?



Step 5. Summarize Data

- Summarize the outcome measure data using **bullet points** under the appropriate table or chart.
 - 51% of youth in 2nd 2004 attained protective skills
 - 43% in 1st 2005 and 45% in 2nd 2005.
 - A 6% decrease in protective skill attainment.

Step 6. Answer the Questions & Summarize the Data into Learnings

- Identify the data that answers the question(s).
- Identify the data that will inform your learning bullet points. (it may be the same)
- Write the Learning bullet points to summarize what has been learned based on the data.

Step 6. Answer the priority question(s)

- How are youth represented across the ACE categories?
 - 17% of the youth have Zero or One ACE, almost half (48%) have Two or Three ACEs.
 - 35% have Four or more ACEs.
- How does ACE the category impact the success of the outcomes?
 - 56% of youth with Zero or One ACE attained protective skills.
 - Protective skill attainment declined as ACE score increased; Two or Three ACEs – 46%, Four or More ACEs – 37%

Activity 2. Key Learnings

- Using slides 8, 9 and 12 (Steps 4, 5 & 6)
- Write 2 or 3 bullet points that summarize the learning from this data.

Step 7. What does the performance measures data mean?

- What is causing the difference in subpopulations or the poor performance of the clients' as a whole?
- What further information is necessary for us to better understand the success or failure of our clientele?
- What are the OBE system challenges that are impacting our understanding the success or failure of our clientele?
- The answers paired with the key learnings becomes the basis for the response to Question #1.

What does the performance measures data mean?

- Youth with Four or more ACEs are less likely to attain protective skills.
 - Could be brain development in high stress environment makes managing emotions and thinking in this fashion more difficult.
 - Has the ACE prevalence data changed over the three time periods?
 - What is the reliability across probation officers for scoring the protective skills section?

Step 8. Future Plans

- Bullet point the data used to make future plans.
 - 37% of youth with Four or more ACEs attained protective skills.
 - 45% of all youth attained protective skills in the last time period.
 - 35% of all youth have Four or more ACEs.
- There should be a connection between the learnings and the data used for the future plans.

Future Plans

- Monitor the prevalence of ACEs in probation youth. Time frame: 7/1/2007 – ongoing
- Investigate ACEs-Protective Skills and felony re-offense data. Time frame: 10/07 – 12/07
- Identify ACEs in probation youth at intake. Time frame: 1/1/2008 – ongoing
- Pilot test: Youth with Four or more ACEs into Aggression Replacement Training. Time frame: 3/1/2008 – 7/1/2008

Step 9. Choose a report style

- Answer the 3 questions.
 1. Using 18 months of Outcome data **and** at least one other performance measure; explain the learnings that have occurred in this program using performance measures.
 2. Given these lessons (must include outcome data and may include any other performance measures), please describe your plans for the program for the next 6-12 months.
 3. What else would you like your funder to know about the effectiveness of your program?
- Evaluation Report Style
 - Better reading flow
 - Greater flexibility

Keys to a Good Report

- Use the data that you've developed to answer the questions.
- **Rating: Eighteen months of Outcome data must be presented and learnings identified from this data.**
- Provide context to assist the reader in understanding your key learnings.
- Bullet point the learnings – helps the reader easily find the learnings.

Rating: The reader must clearly understand the program learnings.

Keys to a Good Report

- Make a clear connection between the program learnings and the future plans.
- **Rating: Learnings must connect to the future plans.**
- The future plans must be reasonable and have a time frame for implementation.
- **Time frames should be reasonable, meaning that the program can take all the necessary steps in the time frame that has been proposed.**

Questions the Funders will answer based on the Annual Report

- What data (performance measures/variables) were used in this OBE report?
 - Key to answering priority questions?
 - Presented in a clear and understandable fashion?
- What did the historical (18 months) data tell you about the program?
- What did the program learn?
 - Learnings were clear or identifiable?
 - The data supports the learnings?
 - Learnings are linked to future plans?

Questions the Funders will answer based on the Annual Report

- How does the data support the program's future plans?
- How reasonable are the future plans the program is proposing?

Questions about the Annual Report

- **Major questions** – are questions that without an answer, the rater cannot understand the data, learning or future plans of the program.
- **Minor questions** – are questions that, if answered, would enhance the rater's understanding of the data, learning or future plans of the program.
- **Probing questions** – are questions that are inquisitive, will spur the program to think deeper about their data or are future focused.