

## **Developing the Annual OBE Report Step by Step Process**

The Annual OBE Report requires the program to review 18 months of performance measure data. Tables and charts that summarize the data for comparison over-time need to have 18 months of data. Tables and charts that are comparing variables need only use the performance measure data for the report year, although you can use all 18 months if you chose.

- Step 1. Identify the questions that are intriguing to your program. Start by brainstorming these questions with staff, management and/or board members. What do you really want to know about your program? Remember that the cornerstone of the Annual OBE Report is the outcome measures for your program, so consider your outcomes when identifying the most important questions for you to answer in this report. Also, consider the audience that you are writing for, Funders when selecting the priority questions. One or two questions should be prioritized for the Annual OBE Report.
  - Step 2. List the performance measures that are necessary to answer the questions you've identified as priority. Remember you must use your outcome measures in the Annual OBE Report plus at least one other performance measure (outputs, resources, demographics of customers, financial data). Next identify the variables that you will be using, if any in this report. Fill out the table below as a summary of the data that you will need for this report.
  - Step 3. Establish criteria for making program or system changes. The criteria for change should be set prior to data analysis, so that your decisions are not biased and reflect the data and standards that you have set.
- Note: Steps 1 thru 3 can and should be done as early in the process as possible to assure that the appropriate data is available to answer the questions. Waiting until the end of the year to do these steps may limit the usefulness of the OBE process.**
- Step 4. Build table or charts that clearly present the performance measure and variable data that you've selected to answer the priority questions you identified in Step 1. [This process was taught in Excel Basics Course]
  - Step 5. Summarize the outcome measure data using bullet points under the appropriate table or chart. This provides you with the essence of the narrative you will write for the Data Summary.

Step 6. Answer the priority question(s) selected for this report. To do this use the data from above and bullet out the supporting facts. There should be at least one and likely two or three bullets. Then write one or two brief summary statements for each for each of the priority questions. This should lead to the answer to the priority question or to additional questions. This is the data that will inform your learning bullet points. Learning bullet points should be summarized at the end of the Question 1 in the Annual OBE report.

Step 7. What does the performance measures data mean? These two or three questions should help you uncover the meaning of your data.

- What is causing the difference in subpopulations or the poor performance of the clients' as a whole? (If successful, then switch poor to excellent)
- 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 to these questions, paired with your performance measures data become the narrative for the learning question (1) of the Annual OBE Report.

Step 8. You now have; a) summary of performance measures, b) data (performance measures) answers summarized for your priority questions and c) your best understanding of what the data means. It is now time to take this information and determine what actions (program/system changes) are necessary in the next 6 to 12 months.

If you decide no program changes are necessary this is the place where you will use your data to back up that decision. It is also, where you will determine what questions your program needs to answer in the next report to gather a different perspective that might lead to improvements to your program. This information should be put into 3 to 5 bullet points that will be used to create the response to Question #2.

If you decide (based on the criteria) that program changes are required, then this is where you will bullet point the data that led you to the decision and the specific action with a time frame that your program is going to take over the next 6 to 12 months. At this stage writing brief bullet points is all that you need to do to be prepared to answer Question #2.

- Step 9. Choose a report style. Two report styles are available to you. The first and likely the simplest is to answer each of the questions directly. The second is to write in an evaluation report style. This style gives you more freedom and may allow for a better reading flow. (This is your choice you should choose the format that you believe will best express the program learning and improvements for this time period)

*Go to the Section that matches the report style that you've chosen.*

### **Answer the Questions – Report Style**

- Step 10. Copy & Paste or write out the data that answers the first question. This includes any tables or charts and the questions/answers that you prioritized.

“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. “

Once this is done, provide the context for each of the data pieces. This is information about your program or the performance measure that will fill in any gaps the reader, in this case your Funder, might have.

Bullet point the major learnings.

- Step 11. Copy & Paste or write out the responses to Step 8 for Question #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.”

Once this is done, provide the context for each of the decisions/timeframes. This is information about your program or the performance measure that will fill in any gaps the reader, in this case your Funder, might have.

- Step 12. Answer Question #3. “What else would you like your funder to know about the effectiveness of your program? “ This question is here for you to discuss any aspect of your program that you deem important to this report that did not come out in the previous two questions. This question is not rated by your Funder.

Step 13. Optional, you may want to write a brief introduction and conclusion to the report. This is one of the areas that the Pilot groups thought would be helpful when they read others reports.

Step 14. Review your report. Have someone else review your report. Make any edits you deem necessary.

### **Evaluation Report – Report Style**

Step 10. Discussion of Performance Measures: Copy & Paste or write out the performance measure data for 18 months and the annual data for this year. This may includes any tables or charts and the questions/answers that you prioritized, unless they are related to the variables.

Once this is done, provide the context for each of the data pieces. This is information about your program or the performance measure that will fill in any gaps the reader, in this case your Funder, might have.

Step 11. Impact of variables on Performance Measures: Copy & Paste or write out the performance measure data for each variable. This may includes any tables or charts and the questions/answers that you prioritized.

Once this is done, provide the context for each of the data pieces. This is information about your program or the performance measure that will fill in any gaps the reader, in this case your Funder, might have.

Step 12. Summary of Learning: Bullet point the major learnings.

Step 13. Program plans for 6-12 months: Copy & Paste or write out the responses to Step 8. Once this is done, provide the context for each of the decisions/timeframes. This is information about your program or the performance measure that will fill in any gaps the reader, in this case your Funder, might have.

Step 14. An introduction and conclusion are critical for this style of report. The introduction should include the “thesis” for your report and provide a brief summary of the program. The conclusion should summarize the major findings of your evaluation and any recommendations that will be implemented.

Step 15. Review your report. Have someone else review your report. Make any edits you deem necessary.