

## Annual Report Rating Tool Guidebook

The Annual Report Rating Tool (ARRT) is comprised of three sections: Guiding Questions, Rating and Comments. The Rater will complete each section of the ARRT based on the instructions set out in this Guidebook. The entire ARRT will be provided to the Agency/Program Executive Director for their review.

### GUIDING QUESTIONS

The Guiding Questions are a mechanism for the rater to take notes, document questions and state their understanding of the basic points while reading the Annual OBE Report. These notes should be used as the basis for the both the Rating and the Comments sections of the ARRT.

1. What data (performance measures/variables) were used in this OBE report?
  - a. Key to answering priority questions?
  - b. Presented in a clear and understandable fashion?

*In this question, the rater should list the performance measures and the variables that the program used. This documents exactly what data the program collected for the Annual OBE Report. Next consider how key the data was used in answering the priority questions. Finally, was the data presented in a clear and understandable fashion? This **may** include tables or charts and **must** include narrative descriptions of the data. Please consider that reading data is different for most people, some prefer charts/tables while others would rather read a narrative description only. As raters, it is not our preference that matters, but our ability to understand the basic messages the writer is attempting to deliver.*

- *Bullet point any suggestions that would make the data presentation clearer for the reader.*

2. What did the historical (18 months) data tell you about the program?

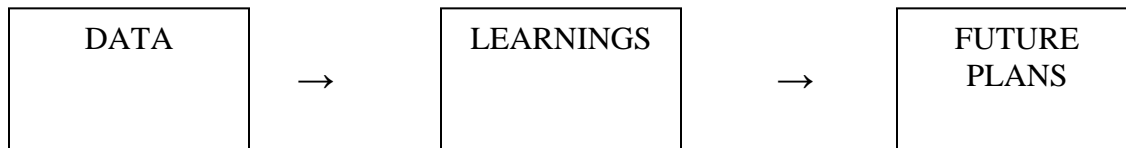
*Here the rater is looking beyond a clean presentation of the data, to what is the data telling the program over time. Is the description of the historical data accurate? Does it provide an opportunity to learn? Were the fluctuations in the data explained? Based on the report, use the questions above to develop your notes for this question. If the program is in the midst of program changes, does it connect the historical data to those changes?*

- *List any questions that you have about this data set using bullet points.*

## Annual Report Rating Tool Guidebook

3. What did the program learn?
  - a. Learnings were clear or identifiable?
  - b. The data supports the learnings?
  - c. Learnings are linked to future plans?

*The rater should document the learning(s) identified in the report. How easy was it to find the learning in the report? Were there other learnings that the program did not identify, but the rater saw? It is very important that the learnings are supported by the data. Is this apparent to you, the reader? If not, please note the learnings that were not supported by the data. Next, determine if you see a connection between the learning and the program's future plans. There should be a logical chain of events. This will assist in your response to Question 4.*



4. How does the data support the program's future plans?

*In your own words describe the connection between the data and the program's future plans. It is important that this is clear to the reader. When the rater writes their interpretation, the writer will understand the reader's thoughts and interpretation. This will assist the writer in preparing their next Annual OBE Report.*

- *List any questions that you have about how the data supports the program's future plans.*

5. How reasonable are the future plans the program is proposing?

*The rater is looking for the writer to provide a guide to the program's future plans. This means that the rater should have a decent understanding of what will be done, during what time frames. Every detail is not necessary, but a general concept so that the reader can make a judgment about the ability of the program to deliver their future plans. Pitfalls, like promising too much are likely and should be addressed by the rater. It will also be important to note if the plans are incoherent or missing large pieces of information.*

- *Bullet point any questions that you have about the completeness and reasonableness of the program's future plans.*

## Annual Report Rating Tool Guidebook

### RATING TOOL

The rating tool uses a Likert Scale, that has points allocated to each response. (The points will be used in the 2008 Annual Report Rating for the 2009 funding process.)

Each of the statements A-D are directly related to Guiding Questions. It is important that the rater refers to their notes when selecting the best description of their thoughts 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.

Respond to the following statements using the scale. Select the response that best describe your thoughts about the OBE report.

A. The historical (18 months) data indicates that the program is using outcome data to learn about their program. (GQ – 1 & 2)

Totally Agree 2pts	Agree 2pts	Somewhat Agree 1 pt	Not Agree 0pts
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**Totally Agree:** *The historical presentation of data was clear and easily understood. It was impossible to misinterpret the data. The accompanying narrative indicates that the program is aware of trends, or complications in the historical data set.*

**Agree:** *The historical presentation of data was mostly clear and easy to understand. A **minor question** or two popped up that the reader couldn’t quite answer. The narrative indicates that the program is aware of trends, or complications in the historical data set.*

**Somewhat Agree:** *The historical presentation of data was not very clear and led to one or **major questions**. The narrative indicates that the program is somewhat aware of trends, or complications in the historical data set.*

**Not Agree:** *The historical presentation of data was not very clear and led to many **major questions**. The narrative does **not** indicate that the program is aware of trends, or complications in the historical data set. Outcome data was not used in the historical data set.*

## Annual Report Rating Tool Guidebook

### B. The primary learning in the OBE report was clear. (G.C. - 3)

Very Clear 3pts	Clear 2pts	Somewhat Clear 1pt	Not Clear 0pts
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*Very Clear:* The primary learning was clear and easily understood. It was impossible to miss the learning.

*Clear:* The primary learning was mostly clear and easy to understand. A **minor question** or two popped up that the reader couldn't quite answer.

*Somewhat Clear:* The primary learning not very clear and led to one or more **major questions**. At least one learning was presented.

*Not Clear:* The primary learning was not very clear and led to **major questions** that the rater was unable to understand the learning presented or no learnings were identified.

### C. The learnings described in the OBE report were useful for the purpose of making future plans. (G.C. 3 & 4)

Very Useful 2pts	Useful 2pts	Somewhat Useful 1pt	Not Useful 0pts
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*Very Useful:* The learnings were very useful, directly related to the data and logically linked to the program's future plans.

*Useful:* The learnings were mostly useful, directly related to the data and logically linked to the program's future plans. A **minor question** or two popped up that the reader couldn't quite answer.

*Somewhat Useful:* The learnings were useful, but either didn't relate to the data **or** were not logically linked to the program's future plans. **One or two major** questions were identified by the rater.

*Not Useful:* The learnings were not useful, they didn't relate to the data **and** were not logically linked to the program's future plans. **Major** questions were identified by the rater.

## Annual Report Rating Tool Guidebook

D. The OBE report described a reasonable plan to use the learnings in the future. (G.C. - 5)

Very Clear 3pts	Clear 2pts	Somewhat Clear 1pt	Not Clear 0pts
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*Very Reasonable: The future plans used the program's learning, time frames were presented that were reasonable and easily understood. It was impossible to misunderstand.*

*Reasonable: The future plans used the program's learning, and time frames were presented. A **minor question** or two popped up that the reader couldn't quite answer.*

*Somewhat Reasonable: The future plans used some of the program's learning. Time frames were not presented **or** were hard to understand. A **major question** popped up that the reader couldn't answer.*

*Not Reasonable: The future plans did not use any of the program's learning. Time frames were not presented or were difficult to understand. **Major questions** were evident that the reader could not answer.*

## Annual Report Rating Tool Guidebook

### COMMENTS

The comments section is where the rater links the Guiding Questions and the Rating into a succinct statement that will assist the program in understanding why they received the rating and how they could improve their next Annual OBE Report.

A. The historical (18 months) data indicates that the program is using outcome data to learn about their program.

1. *List the questions that were identified in Guiding Questions 1 & 2. Identify each question as Major, minor or probing.*
2. *Then, explain to the program what further information was necessary to clarify how the program is using their historical (outcome) data to learn about their program.*
3. *Rating – Finally, state the rating.*

B. The primary learning in the OBE report was clear to me.

1. *List the questions that were identified in Guiding Question 3 (related to the primary learning). Identify each question as Major, minor or probing.*
2. *Then, explain to the program what further information was necessary to clarify the primary learning about their program.*
3. *Rating – Finally, state the rating.*

C. The learnings described in the OBE report were useful the purpose of making future plans.

1. *List the questions that were identified in Guiding Questions 3 & 4 (related to the primary learning). Identify each question as Major, minor or probing.*
2. *Then, explain to the program what further information was necessary to clarify how the program could better use their learning in their future plans.*
3. *Rating – Finally, state the rating*

D. The OBE report had a clear plan to use the learnings in the future.

1. *List the questions that were identified in Guiding Question 5. Identify each question as Major, minor or probing.*
2. *Then, explain to the program what further information was necessary to clarify the program's future plans.*
3. *Rating – Finally, state the rating.*