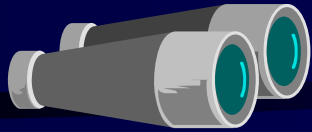


***Methodology -
Report writing***

**Tibor Szanto
CARDS 2003**

In-house seminar for AZVO, Zagreb, 25 October 2007



In this seminar

- I. Relevance of the theme (activity scheme, ESG)
- II. Report writing – logistics
- III. Report writing – substance and results
- IV. Examples
 - ENQA TEEP 2
 - NCHE + ASHE

Questions, comments at any time!

Overview of evaluation steps (recapitulation)

1. Criteria and procedures
2. Self evaluation
3. Expert tasks
4. Selection of experts
5. Training of experts
6. Site visit
7. Evaluation report
8. The results of evaluation
9. Feedback
10. Monitoring and follow-up
11. Closing the quality loop



Note on terminology

“Report”

“S” Document presenting the findings of an Evaluation exercise based on site visit.
detailed, structured (background, context, etc.), more than one expert involved

“D” Document presenting a judgement and its reasoning based on a desk exercise.
brief, focussed (criteria!) expert opinion



I.

Recapitulation: activity scheme – relevance of report writing

evaluation

Accreditation

Audit

Institution
new / operating

Programme
new / operating

Theme

D or S / S	D or S / S	(?) / S
D / S	D / S	(-) / S
(D) S		

ESG: Reference to reports?

2.4.4 Processes fit for purpose [G]

- *the use of the self-evaluation / site visit / draft report / published report / follow-up model of review;*

ESG reference₂

2.4.5 Reporting [S]

Reports should be published and should be written in a style which is clear and readily accessible to its intended readership. Any decisions, commendations or recommendations contained in reports should be easy for a reader to find.

I.

ESG reference₂₊

2.4.5 Reporting [G]

- *meet the identified needs of the intended readership*
- *structured to cover description, analysis (including relevant evidence), conclusions, commendations, and recommendations*
- *purposes of the review, its form, and the criteria used in making decisions*
- *key findings, conclusions and recommendations should be easily locatable by readers*
- *opportunities for readers and users of the reports (both within the relevant institution and outside it) to comment on their usefulness*

ESG reference₃

2.6.6 Independence [S]

Agencies should be independent to the extent both that they have autonomous responsibility for their operations and that the conclusions and recommendations made in their reports cannot be influenced by third parties such as higher education institutions, ministries or other stakeholders.

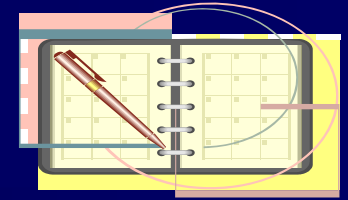
ESG reference₄

2.6.7 Criteria and processes used by agencies [S]

These processes will normally be expected to include:

- *publication of a report, including any decisions, recommendations or other formal outcomes;*
(see slide 6)

Report writing - logistics



Elements of report writing:

- template, form (← criteria!)
- content, substance (incl. analysis and judgement)
- drafting (wording, writing)
- final form including factual correctness

overall responsibility

Actors:

- decision making body (board/council / agency?)
- implementing body (expert panel)
- administrative body (secretariat / agency)

II.

Report writing - responsibilities

template content drafting final form overall resp.

A.	Council	experts	experts	Agency	Council
B.	Council	experts	Agency	Agency	Council
C.	Agency	experts	experts	Agency	Agency

A: evaluations by NCHE as planned

B: evaluations by NCHE, possible option

C: audits by ASHE as planned

Report writing – logistics, cont.

Characteristics following from ESG:

- draft report → HEI → final report
- publication of final report
- opportunities to comment



Report writing - substance

Essential features:

- style (intended readership)
- language (polite but to the point)
- clear structure (see example later)
- description + analysis (← evidence!)
- conclusions, judgements (← criteria, evidence!)
- recommendations



Report writing - results



evaluation:

judgements and recommendations

Accreditation:

decision (on HEI / progs) and recommendations

Audit:

decision (on QA) and recommendations

Independence
in conclusions and recommendations

Execution of report writing₁



Things to possibly avoid

- Clapping on the back
- Beating around the bush (not getting to the point)
- Being descriptive only (lacking analysis)
- Disregarding the evidence collected
- Being biased in judgements / decisions
- Not keeping the deadline

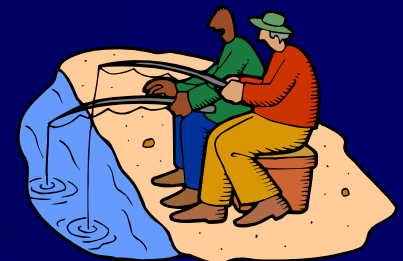
Thinking that you know everything better...

Execution of report writing₂

Rules to possibly follow

- Be balanced as to description and analysis
- Be concise and focussed (to the point)
- Show respect to HEI in writing too, be a real partner!
- Try to be objective
- Be precise (form, regulations, language)

Be a critical friend!



Report writing - examples

evaluation

Accreditation

Audit

Institution

NCHE

Exist. progr.

TEEP 2

New progr.

Theme

	NCHE	
	TEEP 2	
		
		

Example₁ – ENQA TEEP 2 project

- Subject: 3 Joint Masters Programmes offered by international consortia in Europe
- Type: evaluation
- Panel: disciplinary experts, QA experts, students secretary: one of the QA experts (agency repr.)
- Focus: organisation and management
programme content and delivery
quality assurance
- Visits: ~ 5 partners (locations) / programme
- Report: next slide (see handout)

Example₁ – TEEP 2 cont.

Report structure

- a) description of the project
- b) description of the programme
- c) evaluation (analysis)
 - criteria
 - positive features
 - developmental opportunities
(= weaknesses and recommendations)
- d) conclusion
- e) annexes

IV. **Example₂ – inst. evaluation / accr. by NCHE**

Subject: institution + programme

Type: evaluation + accreditation (licence by Minister)

Panel: 3+1 discipl. experts (1 “unrelated” disc., being also a QA expert at the same time), 1 student (+ options)
Agency representative: co-ordinator

Focus: - operation of HEI and programmes
(incl. organisation, content, research, resources)
- **quality assurance** (appraisal of relevant documents)

Criteria: documents + quantitative + qualitative criteria

Report: **see next slide**

Example₂ – NCHE cont.

Report structure (~ Self-analysis)

1. Study programmes
2. Students and studying
3. Teaching and teachers
4. Research and professional activities
5. International activities
6. Space and equipment
7. Study quality assurance
8. Funds
9. Administration and services

+ accr. proposal for HEI and each study progr.

Example₂ – NCHE cont.

Agency tasks in relation to report(s)

- a) Final report – formal checking
 - harmony with template
 - rules and regulations (references)
 - HEI / programme basic characteristics (e.g. name)
 - language
- b) Report on the procedures by the Agency
 - chronological overview of decisions
 - contract with experts
 - date of submission of self-analysis and tables
 - info on site visit
 - date of submission of final report
 - financial report
 - documents (self-anal., tables, final report)

Thank you for your
attention!

