Lesson Proper for Week 13

WRITING AND REPORTING WITHIN YOUR FIELD AGENCY (CONT.)

Written Reports Related to Administrative Services

Students and professionals in administrative roles may write as much or more than do those in direct service roles, but their writing tends to be of a different type. If you are in an administrative internship placement, the writing requirements that you encounter might be quite varied. Administrators often write for the purpose of internal communication within the agency as well as for communication with external audiences, such as other agencies, funding sources, community organizations, media outlets, and the community at large. A few of the most common types of reports are discussed in the following sections.

Annual Reports

Reports about the agency and its various programs and accomplishments are prepared at least annually in most organizations. These are often compiled from reports submitted by directors of various units and programs within the organization. The agency director then analyzes and synthesizes this data to create the annual report. Annual reports are used for intra-agency communication and for communication with various bodies having oversight responsibilities for the organization. Internal to the organization, annual reports form the basis for planning for the coming year (Weiner, 1990).

Annual reports generally include statistical information regarding the clients served as well as descriptive information about the programs and services delivered in the previous year. In these reports administrators assess the extent to which program goals have been accomplished that year and the quality of the agency's functioning in the course of meeting these goals. These reports often identify strengths and weaknesses in the organization and make recommendations for improvements and changes. High-quality annual reports are required for agency

accountability and focus on quantitative outcomes of its programs rather than simple program descriptions and statistical reports. Therefore the most effective annual reports are challenging to develop, requiring skills in outcome evaluation (discussed later in this chapter) as well as skills in writing (Lewis, Packard, & Lewis, 2007).

Process Evaluation Reports

Process evaluation reports are required within many agencies (Lewis et al., 2012). These reports are generally used internally in the agency and are intended to help administrators determine whether the agency's operations are sufficient and effective to meet the stated goals of the organization. Process evaluation reports provide ongoing information about the agency's operations and are used to monitor how effectively the various units of the organization are achieving the agency's goals month-by-month or quarter-by-quarter. Each unit within the organization might be required to submit such a report to the agency director and/or board of directors monthly or quarterly in order to ensure that each unit's work is staying on track and that the administrative structures and methods that are in place are effective in getting the job done.

Questions relevant to a process evaluation might include, for example, what organizational structures are in place to support the accomplishment of the program's goals? Do these need to be modified in any way to improve program efforts? Is the program being implemented according to the original program design or has it been modified? If so, for what reasons? How are decisions made? Reports of this sort may be fairly comprehensive, including number and types of clients served, staff–client ratios, specific services rendered, financial expenditures and acquisitions, supervisory and communication systems, staff development activities, special program initiatives, and so on for the period covered.

For example, a parent education program that has set an annual goal to deliver education sessions to at least 300 Spanish-speaking parents would monitor whether reasonable benchmarks are being reached each month or each quarter and what efforts have been made toward that end (Grinnell, Unrau, & Gabor, 2008). If only 25 parents were served by the end of the first quarter, this information would provide important feedback that administrators could use to examine how operations might be modified to achieve greater program effectiveness in the months ahead.

Outcome Evaluations

Program administrators and direct service staff alike want and need to know the outcomes of their efforts and are eager for information that can help them conduct their work more fruitfully. Outcome evaluations can be useful tools for refining and shaping programs for greater effectiveness. Beyond internal uses of outcome evaluations, human service organizations are increasingly accountable to various funders that require evidence of program effectiveness. Whether organizations seek funding from public coffers such as cities, counties, states, or federal revenues or from private sources such as private foundations or United Way, the decision-makers frequently require evidence that the program is having the desired impact.

Outcome evaluations require that agency administrators identify clear measures for assessing program effectiveness, describing in measurable terms the desired outcomes of the program and the methods used to assess those outcomes. Although this evidence-based practice is a highly valued principle in human service delivery, producing high-quality outcome evaluations is a complex task that presents significant challenges in many human service organizations. Many agencies do not have the funding, time, or expertise to conduct well-designed research. Few use experimental designs in which the outcomes of the program can be measured against those of a control group or any comparison groups using other program models. Often, when positive outcomes can be noted, it is difficult to claim a clear cause and effect relationship between the program provided and the outcomes since isolating and identifying the variables that produced the outcomes can be a daunting task (Grinnell, Unrau, & Gabor, 2008). Even so, it is important to make good faith efforts to assess the impact that programs are making even while acknowledging the limitations of those assessments and to report outcome findings as straightforwardly as possible.

Reports to the Board of Directors

Reports of various kinds (both written and oral) are made to the board at most regular board meetings. The by-laws of agencies dictate such meetings at set intervals, such as monthly, every two months, or quarterly. In addition to the special reports prepared for each board meeting, boards of directors will often also have access to all of the reports discussed previously: annual reports, process reports, and outcome reports.

Reports to the board of directors at their meetings routinely include financial information, progress reports, and process evaluation reports from various units and/ or the organization as a whole. Because the board of directors is responsible for the agency's performance, it must monitor activities closely (Gelman, 1995). Written reports are often used for this purpose. At times, additional reports are generated exclusively for the purpose of communicating with the board. Examples of such reports might include formal proposals for new programs, program modifications, or policy changes. Such reports are submitted to the board of directors as a first step in seeking their input and approval.

Funding Requests

Funding requests are written in human service organizations of all types. Some may seek funds from tax revenues through filing proposals to various elected boards and/ or government entities. Others might seek funds by making requests to sources such as United Way, private donors, or grant sources, both public and private. Private nonprofit programs might even submit funding requests to corporations that offer funding to support public service initiatives in the local community as part of their public relations efforts. Two common types of documents for fund-raising purposes are case statements and grant requests.

The case statement is an important tool in fund-raising from private sources. It serves to cultivate interest and support from potential donors. This document typically includes a description of the organization seeking funds, a convincing argument as to why support is warranted and for what purpose, and an explanation of how contributions will be used to address the needs described. This statement is then used in a number of ways. It may

be used as an outline by staff members or volunteers as they speak with potential donors, as an initial mailing to prospective donors prior to a person-to-person visit, or as a handout to audiences during fund-raising presentations (Gronbjerg, 2008). The case statement is generally used when soliciting donations directly from donors.

Over the last 30 years, grant writing has become increasingly common in human service agencies. Although the various sources of grants might require slightly different types of proposals, grant requests generally include the following information: a description of the need or problem that the funding will be used to address, evidence to document the existence of the need or problem, a description of the project for which funding is being sought, the specific goals and objectives of the program, a budget including staffing needs and expenses, the strategies or plan of action, the project's goals and objectives, a project timeline, and a plan for assessing the outcomes of the program being proposed. As discussed previously, an evidence-based rationale for the proposed program and its projected outcomes is a key component of grant proposals today. The grant proposal itself is then accompanied by a cover letter and an executive summary (Lewis et al., 2012). Inquire about how you can become involved in any fund-raising and grant-writing efforts in the agency so that you can learn as much as possible about the process. Human service students can considerably enhance their skills and employability by developing expertise in fund-raising and grant writing.

Public Relations

Public relations has become a critical component of administrators' roles in human services organizations. Written materials comprise one of the most essential cornerstones of the public relations efforts within many agencies. Such activities as writing press releases, creating brochures and website content, and producing agency newsletters are now commonplace within human service agencies of all types and sizes. These efforts are important in maintaining community awareness of programs, marketing the services that the agency offers, and managing the public image of the organization. Many human service organizations cultivate relationships with local journalists and newscasters to facilitate their ability to promote the organization locally. Agency websites have become particularly important public relations tools for human service organizations. Websites are used to educate and inform the community about the agency's mission and services, communicate with clients, recruit and manage volunteers, solicit donations, post position vacancies, and promote agency fund-raisers and programs. Although websites provide a rich resource for many populations in the community, often the people who have the greatest needs do not have access to technology.

This problem is sometimes referred to as the "digital divide." The term *digital divide* refers to the fact that access to and use of computer technology varies dramatically among various subgroups in society. Lack of computer and Internet use among those 18 years of age and older is most prevalent among older adults, people with low educational attainment, and those with low household income (Powers, Dutt-Doner, Janz, & Thomeczek, 2008; Zickhur, 2013). Obviously these are groups who experience a high level of need for information and services from human service programs. Human service professionals therefore must be committed and creative in designing

public relations efforts that will reach into all segments of the community, rather than relying on electronic sources exclusively, while also seeking ways to reduce the digital divide as it affects the clients and communities that they serve.

If your organization does not currently have public relations materials or has materials that are out of date, you might offer to create or update some materials as a special project during your internship. You might try your hand at creating a draft for a brochure, for example, and share your efforts with your supervisor and other staff members. If your program already produces these materials, inquire about how you might get involved in these efforts. For example, you might write an article for the next edition of the agency's newsletter.

Students are often able to provide positive, fresh, and interesting perspectives on the agency in these articles. Such efforts on your part will give you an excellent opportunity to practice and develop new writing skills while providing a much-needed service for your organization. Also, just as the digital divide affects clients, human service organizations can also experience a digital divide. Some organizations do not have websites because they lack the resources, time, or skills to develop and maintain them. If this is the case with your internship organization, you might explore whether it would be worthwhile to connect them with the computer science, communications, or marketing program at your college or university. Many of these academic programs have web design courses.

Developing agency websites can provide excellent service-learning opportunities for students in these courses. As a human services intern, you might serve as a link between the agency and your campus to foster such a relationship and participate directly in the initiative by providing more in-depth knowledge of the organization based on your experiences there.

Oral Reporting and Presentations

In addition to written reports, oral reports are commonly required of students and professionals in human service settings. Professionals in administrative roles frequently present information to staff groups, community groups, potential funding sources, and boards of directors. Professionals in direct service roles speak before their peers and/ or supervisors to present case material, receive consultation, and conduct education and training for one another. These presentations are often done in formal, regularly scheduled meetings sometimes referred to as *staffing*, *case conferences*, *review team*, or *grand rounds*. As discussed in Chapter 6, public presentations are also common elements of agencies' community education efforts. (See "Community Education" in Chapter 6 for detailed information on making public presentations.)

Oral presentations that are internal to the organization are a valuable part of any agency's functioning and serve a number of purposes. They ensure that workers are receiving adequate oversight and the input of other professionals as they conceptualize and intervene in complex human lives. Additionally, such presentations can constitute a form of continuing education for staff as they learn from hearing their peers present on various issues in their fields of expertise. Just as in making oral presentations in the community, making an oral presentation in your organization requires awareness of the audience and considering their backgrounds, knowledge, relevant experiences, and perspectives as well as the size of the audience and the formality of the setting. For example,

reporting to your supervisor individually will be a different reporting environment as compared to presenting to the full staff in case conference or staff meeting. Similarly, speaking in a group in which both clients and agency staff are present will likely require special sensitivity.

Likewise, making an oral report before staff members whom you do not know is likely to require more formality than speaking before staff members with whom you work every day. As you develop any in-house oral presentations, clearly identify your goals. In internal staff groups, you are often presenting information simply to get the facts of the situation before the group for the purposes of consultation and decision making.

In this case, you want to paint a clear, accurate, comprehensive, and descriptive picture of the situation so that decision making can be based on good information. (For more information about oral reporting in your organization, review the guidelines and suggestions for oral reporting discussed in “Community Education” in Chapter 6.)

Conclusion

Students are sometimes surprised to learn how much time and effort human service professionals put into writing and reporting. Although students may be well prepared for many administrative and direct service aspects of their work, they may be less prepared for the reporting functions of human service professional roles. Skills in gathering and organizing data, synthesis and analysis of information, writing in varied formats and for diverse purposes and audiences, verbal and nonverbal communication, use of technology, and more are required to handle these requirements effectively. All of these skills can be developed through ongoing effort, practice, motivation, and self-evaluation, processes that you are no doubt engaging in during your internship.

◄ Preliminary Activity for Week 13

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