# Assessment report template

**Advice current at: 10 January 2017**

The following template should be used for all assessments. Deviations from the template should not be made without consultation with Standard team.

## Assessment and reporting process

|  |  |  |
| --- | --- | --- |
| **Timeframe** | **Activity** | **Responsibility** |
| Day 1 | Conduct checkpoint assessment   * Gather evidence of pass or not pass per criteria. * Assessor panel compiles notes on progress and areas of improvement for inclusion in report. * Suggest recommendations to Service team. | Lead Assessor |
| Day 1-2 | Write assessment report   * Ensure all Assessors have input to report. * Seek advice or follow up with Service team as needed. * Identify whether team passes the checkpoint. | Lead Assessor |
| Day 2-3 | Provide final report to Standard team. | Lead assessor |
| Day 2-3 | Provide report to Service team. | Standard team |
| Day 4 | Provide feedback to Lead assessor on accuracy   * While final outcomes may be disputed, service teams have responsibility to ensure the report contains no factual errors relating to the service or assessment. * In the case of unresolved disagreement, issues should be escalated to the Standard team.   **Important:** Service teams are not part of the formal clearance process for assessment reports. They are given opportunity to review the content prior to publishing as a courtesy and to check accuracy only.  Providing feedback is optional. If the Service team does not provide comments within the allocated timeframe, the report will be considered accepted as accurate. | Service team (delivery, product or service manager) |
| Day 5-6 | Review and style edit   * The report will be checked for tone, clarity, content inclusion and brevity. * The report may be altered (without changing outcomes) to meet quality standards. Where this occurs, feedback will be provided to the Lead assessor. | Standard team |
| Day 6-8 | Report published on dta.gov.au. | Standard team |

## Report advice

* Reports should be brief, no more than 3 A4-pages long.
* Maintain the formatting and styles of the template.
* All sections of the template are required, unless otherwise specified.
* Do not change headings of the template. You may use additional nested headings where appropriate.
* Ensure tone is amiable while remaining professional and independent.
* Write in plain English. Spell out acronyms the first time they are used. For writing advice, see the [DTA’s Content Guide](https://guides.service.gov.au/content-guide/).
* Ensure you write clearly for your intended audience. This may include:
  + the agency to which the service belongs
  + other service teams and assessors
  + interested members of the public (i.e. media, industry, people using the service)
* Do not assume the audience will be familiar with the service or specialist terminology relating to the service (especially if this is an alpha report).
* Seek early feedback from the Standard team on clarity, brevity and appropriate tone.

## Key

* <black bracketed text> indicates text should be replaced by author.
* *Blue italic text* indicates advice for the author to help complete the template. Delete this text prior to submitting the report to the Standard team.

## Further advice

Contact the Standard team via [standard@digital.gov.au](mailto:standard@digital.gov.au) for any questions or comments.

**Delete the advice pages prior to submitting the completed report to the Standard team.**

<Service Name> – <Stage> assessment

<Insert brief description (limit of one paragraph) about the product or service here.>

*Keep paragraph left aligned. Avoid lists in this section.*

**Department / Agency:** <Agency name>

**Date of Assessment:** <Month day, year>

**Assessment type:** *<*Digital Transformation Agency-led / Agency-led>

**Assessment stage:** <Alpha / Beta / Live>

**Result of Assessment:** *<*Pass / Not pass>

**Lead assessor:** <Name>

**Product Manager:** <Name>

**Previous reports:** <Alpha report>, <Beta report> *Provide link to report here, delete text if not applicable.*

**Code:** <link to code repository>

**Metrics:** <link to dashboard>

*Ensure to highlight good or poor performance around criteria 8 and 11 below. For example, if code is not available, specify why this is the case in the assessment detail.*

# The service <passed / did not pass> the assessment because:

<A few short paragraphs summarising why the service is ready to progress to the next stage, or not. Aim for 2 to 6 paragraphs. Highlight the major successes or areas for improvement, at a high level, that lead to the assessment result.>

*Keep paragraphs left aligned and use bullet points only to indicate lists of items.*

## Assessment detail

*Provide specific details of how the service performed against all relevant criteria. Ensure that you capture any unique or novel ways in which the team solved issues or approached the criteria.*

*You don’t need to make comments against every criteria. If a criterion was not assessed, you should specify why. Delete criteria headings where there is no subsequent content.*

### Criterion 1: Understand user needs

<insert text> *or delete criterion heading.*

### Criterion 2: Have a multi-disciplinary team

<insert text> or *delete criterion heading*.

### Criterion 3: Agile and user-centred process

<insert text> or *delete criterion heading*.

### Criterion 4: Understand tools and systems

<insert text> or *delete criterion heading*.

### Criterion 5: Make it secure

<insert text> or *delete criterion heading*.

### Criterion 6: Consistent and responsive design

<insert text> or *delete criterion heading*.

### Criterion 7: Use open standards and common platforms

<insert text> or *delete criterion heading*.

### Criterion 8: Make source code open

<insert text> or *delete criterion heading*.

### Criterion 9: Make it accessible

<insert text> or *delete criterion heading*.

### Criterion 10: Test the service

<insert text> or *delete criterion heading*.

### Criterion 11: Measure performance

<insert text> or *delete criterion heading*.

### Criterion 12: Don’t forget the non-digital experience

<insert text> or *delete criterion heading*.

### Criterion 13: Encourage everyone to use the digital service

<insert text> or *delete criterion heading*.

# Recommendations

* <Provide realistic recommendations that support progression to the next stage of development, or will enhance the service design or ways of working. You don't need to make a recommendation against every criteria.>

*Use bullet lists to organise recommendations. Keep each recommendation to a single message, one sentence or short paragraph should suffice.*

# Assessment against the Digital Service Standard

*Specify the final result per criteria, delete the terms that do not apply. Do not change the options without consultation with the Standard team. Where the result is “Not pass” this should be explained in the above assessment detail section.*

|  |  |
| --- | --- |
| **Criteria** | **Result** |
| 1 Understand user needs | Pass / Not pass |
| 2 Have a multi-disciplinary team | Pass / Not pass |
| 3 Agile and user-centred process | Pass / Not pass |
| 4 Understand tools and systems | Pass / Not pass |
| 5 Make it secure | Pass / Not pass |
| 6 Consistent and responsive design | Pass / Not pass |
| 7 Use open standards and common platforms | Pass / Not pass |
| 8 Make source code open | Pass / Not pass |
| 9 Make it accessible | Pass / Not pass |
| 10 Test the service | Pass / Not pass |
| 11 Measure performance | Pass / Not pass |
| 12 Don’t forget the non-digital experience | Pass / Not pass |
| 13 Encourage everyone to use the digital service | Pass / Not pass |