

CAS Update: Step Six of Program Review

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To help AFA members, we have embarked on a year-long series of articles to support better enactment of self-assessment and program review of their fraternity/sorority advising program (FSAP) using the Council for the Advancement of Standards (CAS). Past articles [can be found here](#) under the section of “Guides and Updates.”

This issue emphasizes **the sixth stage of CAS program review, which focuses on preparing your report(s)**. As a reminder, this process consists of seven steps:

1. Plan the Process
2. Assemble and Educate the Team (note this and step three go back and forth some, explained below)
3. Identify, Collect, and Review Evidence (primary purpose of self-assessment)
4. Conduct and Interpret Ratings Using Evaluate Evidence (launches FSAP into program review)
5. Develop an Action Plan
- 6. Prepare a Report**
7. Close the Loop

By this point, you have conducted internal department self-assessment, assembled and educated your team, compiled all the evidence to have all involved assess alignment with the CAS Standards, and taken the time with your internal team (and if applicable an additional external team) to rate and interpret alignment with CAS Standards based on the evidence reviewed. You have also used this process to begin identifying some of the action items you think are most vital to become more strongly aligned with the CAS Standards and ultimately achieve a high performing FSAP.

As you enter into this stage, it’s important to remember some of the [lessons learned in stage five](#), especially (1) what were the items on which all involved in the review consistently identified as focal areas, (2) what were some of the sticking points and how did you resolve them, and (3) what was the process used to determine priorities, both short- and long-term, so that the act of self-assessment and program review becomes one of planning and enhancing the infrastructure to be an outstanding FSAP.

Consider these things when you begin to write a report. The report should achieve three primary objectives:

1. Summarize the process used to arrive at the point of identifying action items (and moving into strategic planning).
2. Summarize perceptions of strengths and areas of improvement in order to represent how you plan to respond to the needs of the FSAP as well as those of the larger interfraternal and higher education world.
3. Convey to a range of stakeholders that the FSAP has (1) examined its effectiveness and structure, (2) identified areas in which to improve, and (3) has developed recommendations to enhance its overall operations.

A potential structure could be as follows (in this order):

Overview: this includes two pages summarizing the intent behind the process as well as the steps used for completing self-assessment and program review. You should think of this the same way one might approach writing the first few sections of a typical research article (except that you scale to only two pages):

1. A few sentences contextualizing the decision to enact the process should start the document. Try infusing a bit of literature, if appropriate, that would answer the question “why is this process important to the FSAP or higher education functions in general.” Here you state some of the end goals you wish to achieve. Try to cap this at four sentences. For example:

As part of a divisional approach to ensuring quality delivery of programs and services to students, Fraternity and Sorority Life conducted self-assessment and program review. Broadly, we know self-assessment and program review are important tools that help to demonstrate to our public how we are achieving goals as well as working toward improvements (CAS, 2015).¹ Through this process, we were able to examine goals, receive feedback from a range of stakeholders, identified shared ideas about strengths and areas of enhancement, and begin to conceptualize some action items that, moving forward, can better align our office with the industry standards of CAS.

¹ Council for the Advancement of Standards in Higher Education. (2015). CAS professional standards for higher education (9th ed.). Washington, DC: Author.

2. Highlight the methodology you used. We encourage you to see the advice on step three to get a sense of what you may highlight. This should only be a paragraph, but something along the lines of *“To ensure we conducted this process to achieve these end goals, we examined artifacts, including reports, websites, pamphlets ... These sources of evidence allowed both the FSAP to conduct self-assessment and the internal (and external if applicable) review team(s) to use a qualitative approach to identifying areas of strength and enhancement.”*

The overview is your opportunity to give the reader a glimpse into why and how you conducted these processes. Remember that less is more here because the reader just needs to have faith that you did this for the right reasons and you used a sound approach. You don't need to get into explaining each type of evidence (unless you wish to and that may be better as an addendum listing all evidence sources).

Summary of Findings: keeping with the research journal article idea, it is important to identify the findings of the reviewers. This section will likely be about 7-10 pages and explain the strengths and areas of enhancement identified by your review teams. This is really what the reader wants to know when considering how CAS Standards exist to ensure high quality delivery of programs and services.

The key to summarizing these findings is to: (1) state the finding and (2) identify the evidence used to determine the finding. It can be helpful to frame the summary based on the [different parts of the CAS Standards](#). It may be helpful to [review this sample report in general](#), but specifically notice how the authors approached the writing in each of the sections: state the objective of the section, identifying the findings, and always point to evidence about how the finding was derived. The sample report may be a little lengthy in the summary section. Therefore, you might prioritize key points versus all points of interest for this report. Length of this and other sections should be determined by the charge given for the entire process and specifically the report as well as who will have access to the report (a good rule of thumb is that ANYONE could review your report).

The [sample report](#) provided was written by an external review team. The final report you will write will be pulled together using a range of sources, but it is important to consider how the individual reports from the internal review team and the external reviewers (if applicable) can be pulled into your final report. You don't need to reinvent the wheel. Know that, as is the case of the sample report, it can get pretty long, so you may want to edit down to really hit the high points depending on which audiences will review the report.

There are two strategies identified in our [May contribution](#) that are reminder-worthy given that your best approach to this report is to triangulate existing data sources rather than try to come up with all of the content yourself:

“First, pick off the low hanging fruit: what can be done immediately, with little stakeholder input, and without expanding or exhausting resources? ... Remember your goal is to become more aligned with the CAS Standards, so these items are geared toward the overall improvement of how the FSAP delivers its services and programs ...”

“The other thing to consider is how data sources can be triangulated and synthesized. We wrote in a past issue about the problems that come when trying to identify consensus. When you being action planning, you think about where those points of consensus are across all of your sources. Using these data sources, the raw data, the report they provided as well as using their expertise to identify good practices to apply, will help you to figure out priorities very differently than if you just reviewed only the score sheets or only the reports.”

Recommendations

[In the last issue](#), we talked about developing an action plan. The items for your action plan should be included in your final report. As with any planning process, you should consider how the mission of the FSAP should read moving forward as well as what will be your vision and what goals will drive your work in implementing the CAS FSAP review recommendations.

Your recommendations could range in very broad to very specific, though we recommend broad so the planning process can then take place with a guide versus directives. The report is the first half of a longer process: you have assessed, summarized said assessment results, identified the key areas of focus, but you have yet to actually use the report to develop a broader strategic plan for the FSAP. You can see in the [sample report](#) that while the authors infused some level of recommendations earlier in the document, they provide specific ideas under each CAS category that could be implemented by the department. You will need to identify if the report should be broad or specific (and the sample report, in our opinion, is leaning toward the specific side given the request of the client) and what should be included. As you prepare the recommendations, continue to look at what the internal and external review teams have offered as ideas and identify if you should adopt all of them, scale some, or remove a few.

The recommendations should be a few pages long and be written in a way that the reader can understand these are actions being considered moving forward. A disclaimer at the top along the lines of “Based on the recommendations of our internal and external review teams, the following recommendations should be considered as our office launches a strategic planning effort” can be helpful. If you do not plan to have a strategic planning effort follow, it would be beneficial to indicate the items are still early recommendations to be reviewed with stakeholders moving forward.

What is a good report?

People often ask us, “what makes a report good.” The [sample report provided](#) is different than others we have seen, but it does seem to be very comprehensive (and while long, there is a difference between comprehensive and too much). Sometimes the format, the length and description of your findings and recommendations, or the addition of addendums (i.e. a list of evidence reviewed or a divisional charge for program review) influences the quality of a report. Reports should be between 10 and 25 pages depending on the depth expected.

An executive summary of two pages should be available for those other publics who will not have the time (or attention span) to read it all. As you develop the executive summary, try to summarize each paragraph into one sentence, so the key point is shared but doesn’t get into too much detail. Then see if you need more detail. Taking 10-25 pages down to two may be daunting, but asking questions such as “for the reader of this executive summary, what is the two to three most important things to know?” You can easily turn your overview into one paragraph through the exercise of summarizing each of those two pages. You can turn your strengths and areas of enhancement into a page simply by summarizing the 10 or so findings that seem most relevant and that can be easily summarized (and likely you will not use the format of using CAS categories as subheadings). Then your recommendations can finish the report, and potentially you might summarize the broad buckets of recommendations versus listing them all. For example, on page 31 of the long sample report, you’ll see several recommendations based on mission. To make this digestible for an executive summary you could write:

Examine relevance of current mission statement and edit to ensure alignment with institutional, divisional, and stakeholder goals. Broadly distribute the mission to allow stakeholders to understand how the FSAP will operate moving forward.

A note about launching into strategic planning

As mentioned often in this article, doing self-assessment and program review is half of the work needed. The other half is to develop the plan for moving forward. Most campuses in which CAS Standards for FSAP (or any functional area for the most part) have been best implemented use the self-assessment and program review process to launch strategic planning and strengthen the overall push toward ongoing attention to departmental/divisional/institutional mission, vision, goals, and strategies. There are many great articles on strategic planning that can be found in old issues of Perspectives and Essentials. One that I think is very helpful is by [Benfield, Wagner, & Stephens in the May 2016 Essentials](#). Failure to develop a plan will often result in the self-assessment and program review simply becoming what you did and not what is guiding your current and future work.

Know your FSAP program review report will guide the work of a committee or small group of people who have been tasked with developing a plan, so it is important to have a thorough and easy to read report.

Conclusion

Step six in the implementation of CAS Program Review dictates that you are preparing a report on your process, findings, and recommendations. This report should be written in a way that will be helpful to your FSAP and its stakeholders, including those at all levels of the institutional hierarchy who wish to review. While these reports range from 10-25 pages (and in some cases more, but that's not necessary unless your institution expects additional content), the key is to ensure you have done due diligence to update people on all activity to date and confirm for them that the process, while "over" with the self-assessment and program review processes, will continue to drive the priorities and plans of the FSAP moving forward. In the next issue of our CAS Association Updates, we will talk more about strategic planning and step 7 in the process: ensuring that you close the loop in this assessment and program review process.