



## Monitoring Report Structure and Format

This document is designed to provide a brief overview of the required, standardized approach, for the development, design, and construction of Monitoring Reports prepared for the President and the Jackson College Board of Trustees. These documents serve as a formal inspection opportunity by the Board, under policy governance. Additionally, they also assist the College by providing data essential to evaluation, analysis, planning, budgeting, and ultimately it its goal of world class performance status.

Generally, all section headings within the report are to bolded and in an Arial 14pt size. Other than cover page and headers, the entire document should be in an Arial 12pt font. At no point should the document exceed 8 pages (i.e., 6 report pages, and 2 appendix pages).

This format will be deployed and utilized for all monitoring reports beginning July 1, 2013.

### Document Elements:

Cover Page. Use the provided cover page template (attached) for the Monitoring Reports. On the template, provide the following additional items: 1) Title of the report; 2) Name of the preparer(s); 3) The person(s) for whom the report is prepared (i.e., President and Board of Trustees); and 4) The date of the report.

Report Sections. The following elements are to be included in the report. Please do not add additional sections, and please adhere to the page lengths as specified below:

- I. **Executive Summary** (1.0 - page). This section should fully utilize the page to depict the high points, achievements, concerns, and related issues in the report. In preparing this section, consider what the reader should take away, should they be unable to read the entire report.
- II. **Institutional Context** (0.5 - page). This section is reserved to provide a sense-making perspective of the report topic relative to the institution's mission, strategic plan, and Board ENDS within the context of higher education. Further, it should address how our work in this area is used to develop and shape our programs and practices and to evaluate their effectiveness.

**III. External Context** (0.5 - page) This section should provide an assessment of the threats and opportunities facing JC. The discussion should provide a focus of the higher education industry, but also the larger environment in which the College operates. The proper analysis should also include an analysis of options.

**IV. Institutional Performance Reporting and Assessment** (2.0- pages). JC's Institutional effectiveness is determined only through a demonstration of how well we succeeded in accomplishing our mission and meeting its overall objectives. This section then, represents the bulk of the report and should provide clear insight into the success/shortcomings of the College's plans and effort, for the monitored issue for the previous 365 days.

The College's experience/data should be evaluated against a set of criteria established in our balance scorecards, the institutional strategic plan, and the previous year's monitoring report. The intended outcome of this section is to assist the College in the allocation and alignment of employee efforts around what the College needs to accomplish to drive institutional success. Use only minimal graphics/charting in this section, rather referring the reader to the appendix.

**V. Institutional Performance Improvement Planning** (1.0 - page). The institutional performance improvement plan section is designed to help clearly define action(s) both undertaken and planned, over the next year, to help employees improve institutional performance, especially as it relates to this area of investigation and reporting. The performance improvement plan should identify operational and issues that need to be corrected. This section should include specific action(s), goal(s) and timelines for corrective action. The content of this section will provide essential content to be integrated into the College's strategic plan.

**VI. Conclusion** (1.0 - page). This section assists the reader in understanding why the analysis and information contained herein, should matter to the organization and its improvement. In writing this section, answer the question(s) "Ok, I've read the report, so what?" "Why should anyone care?" Then, return to the original theme of the report with a final sentence or two.

**VII. Appendix** (2.0 – pages). This section is reserved to provide a deeper insight into the report through the use of supplemental items (e.g., charts, graphs, article excerpts, etc.). In using graphs, they should be presented as 10-year trends.

In some cases, expanded text around particularly complex matters, legal matters, or other key issues surrounding the report topic, is appropriate for this section.