Writing an Annual Partnership Report

Creating a tool that builds partnerships and gives your program more visibility

While it's not required (yet) by many districts or states, the idea of creating an annual partnership report is a powerful one. With planning, it won't actually take long to produce, and the benefits, in terms of building awareness and support for your program among all stakeholder groups, are substantial. Read on to see why and how to produce an annual report, and what to do with it once you've created it.

WHY WRITE AN ANNUAL REPORT?

Educators certainly face no shortage of paperwork and reporting requirements. Why would you put in the effort to produce an annual partnership report?

- **Recognize hard work** – Your staff, students, and partners work hard all year long; it's great to recognize them by memorializing and promoting what they've accomplished.
- **Build internal support** – Given the span of their responsibilities, it's easy for administrators to be unaware of the full scope or impact of your efforts. An annual report is an easy way to keep them up to date. And, by demonstrating impact, it's easier to justify current and expanded resource when it's time to talk about annual budgets.
- **Increase customer satisfaction** – Parents want to know that they've made a smart choice by enrolling their students in your program. An annual report lets them know how much is being done to support their student's learning, encouraging them to support your work and see their commitment through.

- **Recruit new students** – An annual report offers an opportunity to show prospective parents and students how much you do and what kinds of opportunities you offer. It's well worth distributing this report and other similar materials through recruiting fairs and other outreach efforts.
- **Retain partners** – Recognition is a critically important tool in partner retention; an annual report recognizes current partners, both by name and by activity, giving them a resource they can share within their firms and with customers and others.
- **Find new partners** – As with recruiting prospective students, an annual report is an excellent tool for introducing new partners to your work and making clear how much industry support you already enjoy, and what kinds of successes existing partners are seeing from their work with you. Remember that foundations make great partners as well, and that this kind of partnership record is a great resource to share as you start your relationship with funders.
- **Lay the foundation for future strategic planning** – Having a written record of your past activities helps provide the basis for thinking about the future.

OUTLINE OF YOUR REPORT

Your partnership report, of course, should be structured in any way that best represents your program and the work of you, your partners, and your students. However, consider whether some or all of the following elements should be included:

Overview of program

Since many people who are unfamiliar with your program will end up reading your partnership report, including new partners and prospective students and their parents, it makes sense to start by sharing an overview of your program, including the industry or industries in which you operate, the types of occupations you emphasize, course sequences, a description of your facilities and an introduction to your staff.

Recent changes

A report like this affords you the opportunity to show that your program is vibrant, changing and improving in order to better connect and prepare students for industry opportunities. Talk about the improvements you've made over the course of the previous year, including changes to curricula or facilities, staff changes, addition of new equipment or resources, accomplishments such as awards or placement in competition, and industry placements of students.

The numbers

Share some of the metrics that define your program, either in a standalone section or sidebar or embedded throughout the text. This would include numbers such as number of students, number of certifications earned, number of graduates, number who entered the field in question, number of participants in Career Technical Student Organizations (CTSOs), CTSO competition results, number of years of experience of your staff (both in education and in industry), certifications held by instructors, and so on. (See "Guide 8: Building a Data-Driven Partnership" for more on using data.)

Partners

Be sure to list the industry partners with whom you work; they'll appreciate the recognition, and your readers will appreciate having an opportunity to understand how industry informs and supports the work you're doing with students.

Activities

Either separately from, or incorporated into, your list of partners, describe the kinds of work-based learning activities in which students have participated; it demonstrates the fact that you have active relationships with industry (rather than them being passive supporters), and makes it clear that students in your program are given opportunities to experience and explore the careers in which they're interested.

Advisory board

Your advisory board guides your work, helps you build industry relationships, and established work-based learning opportunities for students. Prospective partners and students will be interested in finding out whether and how the industry participates on your board. An active board with strong industry representation will serve as a strong endorsement of your work.

Testimonials

Every marketer knows that customer testimonials are the single most persuasive tool they have when promoting a product or service. We all want to hear from real people when considering buying or supporting something. Ask your current partners, including community and other school-based stakeholders, for testimonials, either for their experiences with specific partnership initiatives or for their overall support for your work, and sprinkle them liberally throughout your report.

Stories/case studies

You can persuade people through data or through stories; while you should be able to make a very strong case using activity and outcomes data, it's the stories that people will ultimately remember the best. Ask students for permission to tell their stories (and their parents, if the students are under 18), focused on how the partnership activities helped them identify a passion, helped them find purpose, or made it possible for them to move closer to their dreams. Photos are very helpful here.

Contact information

At the beginning or end of your report, include complete contact information, including information (address, phone, and email) for the program lead as well as any other relevant contacts, such as a dedicated work-based learning coordinator. You should also include links to any active social media accounts, including your website as well as your blog, Facebook page, LinkedIn accounts, and more.

One word of caution when writing your report: Beware of jargon. Educators often speak in terms of program names, technical terms and acronyms, and your business and community partners simply aren't speaking that same language. Unless you want to watch their eyes glaze over as they read about AYP, CTSOs and differentiated instruction, keep the technical language to a minimum, perhaps even including a glossary of terms if needed.

APPEARANCE AND FORMAT

One of the things that prevents people from creating partnership reports is the belief that they have to be magazine-quality, with professional layout and glossy pictures throughout. However, that's not the case at all. While you want your document to look as nice as possible, setting unrealistic standards just serves as an unnecessary barrier to getting the job done.

Do your best, but work within your constraints. You can create a perfectly good report in Microsoft Word or Google Docs with the limited formatting tools they have, easily adding photos and sidebar

boxes (if desired) using their existing menu options. Additionally, Microsoft Word has dozens of attractive templates you can use as a starting point.

As a rule, color documents are more engaging than black and white reports, but again, work within your limits, and take advantage of existing resources to help you. There are websites that can help with color palettes, and look again to available templates for guidance on color usage (whether or not you actually use those templates). If your school has a branding guide (many, if not most, colleges do), follow their guidelines to make sure people immediately identify your program with your institution.

You might also consider engaging a student in the design and layout process as a real-world project, providing that student with credit in the document for their effort. Alternately you can ask a business partner with experience in the field, or who has access to a layout specialist, if they can handle this project on your behalf (again with full credit in the document as an example of the impact of such partnerships).

Finally, remember to loop in your institution's communications team: they can help you make sure your report lines up with overall branding guidelines, provide graphics such as logos or photos, and possibly even offer support in the development of your guide.

DISTRIBUTION

It would be smart to have some printed copies on hand to hand out to visitors, send to key stakeholders who are less likely to review materials online (especially those inundated with emails like school board members), and distribute at events such as stakeholder appreciation ceremonies. However, the bulk of your distribution will likely take place online. Create a PDF version of your report and send it out to both internal stakeholders like administrators, colleagues, and school board members as well as liberally to external stakeholders, including partners (current and prospective), advisory board members, parents, and the media. And remember to post a copy to your website or program page, allowing anyone interested in learning about your work to see what you've accomplished.

THE VALUE OF PLANNING

Trying to pull all of this information together at the end of the school year can be daunting, especially with all of the other responsibilities that come with that time of year. If you take a few simple steps throughout the year, however, your annual report will quickly fall together thanks to your smart planning:

- **Keep a running list of your partners and partnership activities**. Whether in a spreadsheet or a word processing document, keep a tally of the partners with whom you've worked, the types of projects you did together, how many students were served, and what kinds of outcomes were achieved. This list will serve as the heart of your report, and it will be much easier to reference a ready-made list rather than try to remember everything you did at the end of the year.
- **Whenever a partnership project ends, ask your business counterpart for their feedback and, ideally, a testimonial.** Testimonials are one of the most powerful marketing tools available, and ideally your annual report will be peppered with them throughout the document. Statements made by your current partners will be extremely helpful in promoting your work to both internal and external stakeholders (especially new partners!).

- **If you're planning on writing profiles or case studies of students, look at ways to capture information from them at the beginning of the year** and/or prior to their participation in a work-based learning initiative, and then follow up at the end with a similar effort. You'll be able to clearly demonstrate student progress (interviews and pre/post surveys are great for this), and that progress will make the foundation for some excellent student stories.
- **Keep a good list of contacts.** At the end of the year you'll want to send your partnership report out to as many people as possible; keep a good list throughout the year of your internal and external stakeholders so you can easily get information to them when you're ready. As a bonus, categorize them by groups (administrators, parents, business partners, media, etc.) so you can tailor your message according to their interests and your goals.
- **Think about the timing of your report**: You might be able to release it during a major partnership event, or have it come out at the same time as other reporting requirements to reinforce your accomplishments.

ACTION STEP: PLANNING AND PRODUCING YOUR ANNUAL PARTNERSHIP REPORT

As you think about developing your partnership report, ask yourself the following questions:

Planning

- Have I determined, well in advance, when I want to have this report completed? Timing can be aligned to year-end events or reporting requirements.
- Have I figured out a way to capture information throughout the year on activities and student successes?
- Am I regularly soliciting testimonials and partner stories?
- Are my partnership initiatives tied to measurements that I will be able to share in the report?
- Have I thought clearly about the audience(s) this report will target?
- If I'm going to produce printed copies, have I allocated funds for printing and possibly mailing?
- Am I maintaining a contact list with email and mailing addresses I can use when the report is ready?

Producing the report

- Have I talked with our communications team to see what resources they can provide, such as photos and logos, and what guidance and support they can provide on branding and production?
- Have I found a partner or student (or preferably multiple partners or students) willing to help with design, layout and writing?
- Do I have someone willing to review the document for grammar and spelling before it's finalized?
- If the report is going to be printed, have I left enough time in the schedule to get it back before any scheduled events?

ABOUT THIS GUIDE

This guide has been developed by Colorado CTE, housed at the Colorado Community College System to help Colorado CTE educators build strong and lasting relationships with employers and other stakeholders. For more information on CTE and other resources available to help you, please visit http://coloradostateplan.com/.