Tool 5.1 – Project Summary Report Template

Instructions: A final report is one type of dissemination product that can be used to share the lessons, insights, and steps to conducting a data analytics project. It can inform decisions and discussions and provide a record for future reference. Below is a suggested table of contents listing key topics that can be included in a final project summary report. Please note, several sections of the report can leverage content from other project documents (for example, Tool 1.2, Project Scope: Instructions and Template, in Phase 1).

Background Documents: You should draw from any of these existing documents to write your Project Summary Report:

1. Literature review
2. Project scope
3. Analysis plan
4. Prior summary report drafts or memos
5. Presentations

Suggested Table of Contents:

1. Research questions
   a. Succinct statement
   b. Why does it matter/how do you know it will be used by, for example, administrators or policymakers?
   c. What policy, programmatic or knowledge gaps are you filling?

2. Data sources
   a. What are they? What information does each data source provide?
   b. How are they combined?
   c. What are the important and notable quality issues?

3. Methods
   a. Which methods did you apply?
   b. How have they been applied?

4. Findings
   a. Descriptive statistics
   b. Graphics
   c. Which findings, if any, inspired, surprised (busted a myth), or discouraged you?
5. Caveats  
   a. Scalability to other states (where might it go)  
   b. Coverage  
   c. Quality (timeliness/local validity)  
   d. Inferential validity  
   e. Examples  
   f. Challenges  

6. Next steps and measures of success  
   a. Measures of success for your project, such as reaction from your key supporters or champions  
   b. Next set of research questions and timeline OR next new project and timeline  

Appendices. *These items can be included, if available:*  

1. Code  
   a. Useful code project team has used  
   b. Code project team has developed that’s available for reuse  
   c. GitHub pointers  

2. Visuals  

3. Anecdotes/stories  

4. Relevant project memos  
   a. Quality control  
   b. Analysis plan