Essentials

of Assessment Report Writing

Second Edition

- Clearly and engagingly presents comprehensive guidance on assessment report writing
- Describes a coherent framework for writing reports that instill hope, promote understanding, and inspire effective action
- Includes illustrative case reports with incisive commentary by leading assessment experts

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Alan S. Kaufman & Nadeen L. Kaufman, *Series Editors*

WILEY

Essentials of Assessment Report Writing

Essentials of Psychological Assessment Series

Series Editors, Alan S. Kaufman and Nadeen L. Kaufman

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The right of W. Joel Schneider, Elizabeth O. Lichtenberger, Nancy Mather, and Nadeen L. Kaufman to be identified as the authors of this work has been asserted in accordance with law.

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SERIES PREFACE

In the *Essentials of Psychological Assessment* series, we have attempted to provide the reader with books that will deliver key practical information in the most efficient and accessible style. Many books in the series feature specific instruments in a variety of domains, such as cognition, personality, education, and neuropsychology. Other books focus on crucial topics for professionals who are involved in any way with assessment—topics such as specific reading disabilities, evidenced-based interventions, and ADHD assessment. For the experienced professional, books in the series offer a concise yet thorough review of a test instrument or a specific area of expertise, including numerous tips for best practices. Students can turn to series books for a clear and concise overview of important assessment tools and of key topics in which they must become proficient to practice skillfully, efficiently, and ethically in their chosen fields.

Wherever feasible, visual cues highlighting key points are utilized alongside systematic, step-by-step guidelines. Chapters are focused and succinct. Topics are organized for an easy understanding of the essential material related to a particular test or topic. Theory and research are continually woven into the fabric of each book, but the aim always is to enhance the practical application of the material rather than to sidetrack or overwhelm readers. With this series, we aim to challenge and assist readers interested in psychological assessment to aspire to the highest level of competency by arming them with the tools they need for knowledgeable, informed practice. We have long been advocates of "intelligent" testing—the notion that numbers are meaningless unless they are brought to life by the clinical acumen and expertise of examiners. Assessment must be used to make a difference in the child's or adult's life, or why bother to test? All books in the series—whether devoted to specific tests or general topics—are consistent with this credo. We want this series to help our readers, novice and veteran alike, to benefit from the intelligent assessment approaches of the authors of each book.

We are delighted to include the second edition of *Essentials of Assessment Report Writing* in our series. The internationally-acclaimed authors of this book have offered the field a broad, inclusive, and humane vision of what assessment reports should accomplish. This edition's central theme is that assessment reports are primarily tools of empathic communication. Not only is the examinee understood in empathic terms, but the report reader's

needs are considered carefully throughout the report-writing process. Ultimately, the goal is to guide the reader to a new understanding of the examinee's difficulties and to inspire effective efforts to intervene on the examinee's behalf. Beginning professionals will appreciate the book's practical focus and clear suggestions for writing effectively. Veteran professionals will appreciate how the book challenges them to rethink old habits and give their reports a conceptual makeover. In the final chapter, all readers will appreciate the opportunity to learn from expert report writers in 11 annotated sample reports. We believe that professionals who engage with the ideas of this book will not only benefit from its many direct suggestions for improvement, but they will also find their own creativity is sparked along the way, and they will generate many more ways to enhance their reports so that they better serve the individuals they strive to help.

PREFACE TO THE SECOND EDITION

The first edition of this book was crafted with pride and was well received by practitioners. We saw few reasons to alter the original content at first. The primary shortcoming we hoped to rectify was that the first edition contained too few examples of complete reports. Thus, our original plan for the second edition was to do a little touchup here and there, update the references to outdated tests, and include annotated case study reports from experts we admire. It was a good plan, but soon after we put it in motion, we found ourselves reworking, restructuring, and rewriting almost everything. Why?

To prepare for writing the second edition, each of the four authors took on different tasks. We reread the first edition closely, imagining how it would seem to first-time readers. We read research articles on practices that enhance reports. We interviewed expert clinicians and scholars on how they write reports. We reacquainted ourselves with the classics of the small genre of psychological report writing books and learned all we could from more recent efforts to help professionals write better reports. In the course of our preparations, two truths thrust themselves into our awareness with equal force:

1. All experts urge professionals to write clear, readable, practical reports free of jargon.
2. These urgings have not made writing such reports less difficult.

Our ambition for the second edition has been to tackle this problem head on. The central theme of the book is that assessment professionals can make use of their primary strength—their talent for empathy—and direct it toward the readers of their reports. As we began unifying the content of the second edition around this theme, we found it productive to ask ourselves seemingly simple but fundamental questions about assessment. Why do we have reports at all? Who is our audience? How much do readers need to know? What is the purpose of describing behavioral observations? Which kinds of recommendations lead to meaningful changes?

Although much of the structure and content from the first edition was preserved, most of it was completely rewritten and recast in the light of our central theme. The questions we asked ourselves about the essentials of assessment report writing helped us articulate

explicitly what we had only grasped intuitively before. Sometimes these questions led us to places we did not anticipate going and caused us to rethink old habits, practices, and traditions. We hope that the efforts we took to sharpen the book's focus have enhanced its utility and will help assessment professionals communicate their observations and insights to inspire more understanding, more compassion, and more effective action in the lives of those who need it most.

ACKNOWLEDGEMENTS

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INTRODUCTION AND OVERVIEW

Most of us have, at some point in our lives, when we really needed it, had the happy fortune of receiving support and guidance from thoughtful and generous people we admire—such are the memories from which gratitude is made and the desire to serve is born. Most of us, too, have had the awkward and possibly unpleasant experience of having been "helped" by rather unhelpful people. Some kind souls are merely naive or clumsy; others—less kind—are presumptuous and intrusive. Even if their impulse to help is in some ways admirable, they are not tuned in to the subtleties of the situation or to the needs of the people they are ostensibly helping. Professional helping requires something a little more refined than just the simple desire to help.

Psychological assessment is the application of scientific rigor to the gentle art of figuring out what is going on before one attempts to be helpful, before one blunders into the most vulnerable moments of the intricate lives of others. The uncommon courtesy of listening closely to what people want and need—even before any direct aid is offered—can itself be a great comfort to people temporarily overwhelmed by circumstance.

Assessment professionals, as a group, are exquisitely sensitive to the needs of others. Most readers of this book choose to work in the helping professions because they have a talent for empathy and are eager to be a force for kindness, community, and justice in this world. Many of us have made numerous sacrifices, small and great, to be in the position in which we can be of service to others. Yet, there are forces and pressures at work that often cause otherwise caring and competent professionals to write psychological assessment reports that are not particularly helpful.

It is a common and long-standing complaint that psychological evaluation reports are difficult to read and often fail to communicate useful information (Cuadra & Albaugh, 1956). It is hard to imagine that writing dry, stodgy, routine psychological evaluation reports was what attracted you to this discipline. Yet, dry, stodgy, routine reports are rather common in our field, even though psychologists, diagnosticians, and other assessment professionals are not, by and large, dry, stodgy lovers of routine.

It is clear that reports should be clear, but it is clearly not helpful to simply tell professionals to write more clearly. If mere encouragement to write clearly would have worked, it would have worked already—the call for clarity is repeated in every how-to article and book on assessment report writing we have ever read (or written). Yet, even exemplar reports in assessment textbooks are in many cases quite difficult for typical members of the public to understand (Harvey, 2006). This is, of course, not always true, and there are delightful exceptions (e.g., Mather & Jaffe, 2011). Nevertheless, the rarity of these gems raises the question: Why is it so hard for caring, capable, and conscientious practitioners to resist the urge to write reports that are difficult to read?

It is our contention that assessment professionals generally write such reports—not because they want to, and not because they have to, but because they have been asked to—by training programs, institutional guidelines, and legal mandates (real and imagined). Perceived local norms add weight and inertia to many unhelpful ideas and practices that would not otherwise survive thoughtful scrutiny ("That's the way we've always done it 'round here."). Although most assessment traditions and practices are well intended, too many interfere with clear, empathic communication of practical information.

Fortunately, the forces and pressures that keep us from writing better reports are more than counterbalanced by our natural desire to strive for excellence in the service of others. A core theme of this book is that we should fearlessly look past all distractions from writing helpful reports, preserving time-honored traditions that we have good reason to maintain and respectfully mothballing those that are no longer relevant or useful. If we can achieve clarity regarding our core professional values and the essential mission of the assessment enterprise, our reports can become not only more informative but also actively transformative.

This book is designed for novice report writers, students and interns in training, and professionals who are required to read and understand reports prepared by others. The book is also intended for professionals in the field who desire to improve their skills in preparing and writing assessment reports. As Salend and Salend (1985, p. 277) asked: "What if professionals were given a letter grade on the educational assessment reports they write? Would you get an 'A' or an 'F' or merely an average 'C'?" Although we would not relish being subject to Salend and Salend's hypothetical grading system, we appreciate questions that stimulate productive self-evaluation. We likewise hope that our critique of current practices encourages individual reflection and profession-wide reform.

This text is designed to cover all aspects of preparing a written report as well as provide illustrative samples of clear, informative reports. This first chapter provides an overview of the purposes of report writing as well as a brief discussion of the major sections of a report. Chapters 2 and 3 review many technical aspects of writing, including presentation of the printed word on the page and subtle tips for ensuring that your report communicates effectively. Each subsequent chapter focuses on the creation of a specific part of a report: the reason for referral and background information (Chapter 4), discussion of

appearance and behavioral observations (Chapter 5), test results and interpretation (Chapter 6), diagnostic impressions and summary (Chapter 7), and recommendations (Chapter 9). Chapter 8 discusses personality assessment. Chapter 10 presents special issues related to reports, including feedback, follow-up, and the use of computer-generated reports. Chapter 11 is a collection of tips about report writing. Chapter 12 presents several sample case reports.

THE ESSENTIALS OF ASSESSMENT

The fact that the title of this book contains the word *essentials* might be misleading. By *essentials,* we do not mean dumbed-down pablum aimed solely at people who have never thought about assessment before. Rather, we take the *essentials* of report writing to mean the fundamental organizing principles of our discipline. The essentials are not simple, easy, and obvious; they are that which we cannot do without. They are the core ideas that prevent us from losing our way, writing reports that are irrelevant, confusing, alienating, or otherwise unhelpful.

> ### DON'T FORGET
>
> Note that our use of the term *decision-makers* does not merely refer to powerful others, such as parents, teachers, helping professionals, and administrators. The most important decisions in individuals' lives will be made by the individuals themselves. Great reports often have the explicit goal of helping individuals see themselves with new eyes, moving them to take first steps in new directions to better places.

They are the guiding ideals that move us to write reports about individuals that uncover truths, clarify misunderstandings, restore hope, and inspire change.

The primary purpose of assessment is to discover useful truths about individuals in their social context. The primary purpose of assessment reports is to communicate these useful truths so that they have relevance, urgency, and power. That is, excellent reports help decision-makers view the individual with accurate empathy and thus prepare and motivate decision-makers to take effective action.

DISTRACTING PRIORITIES IN THE REPORT-WRITING PROCESS

It would be hard to overstate the importance of empathy in the helping professions. It is a primary ingredient of successful relationships in general and successful therapy in particular (Elliott, Bohart, Watson, & Greenberg, 2011). Although psychologists work hard to communicate an empathic understanding of a person while face-to-face, we are not often trained to apply our talent for empathy to the report-writing process. While writing, it is easy to lose sight of the fact that our reports will be read by fellow human beings, most of whom have no specialized training in psychological and educational assessment. Other priorities and various constraints get in the way.

Accuracy Versus Clarity

What could possibly be wrong with being accurate? Nothing, of course. There is nothing *wrong* with accuracy, but is it easy to emphasize it at the expense of clarity. Of course, in most writing, accuracy and clarity complement each other. They typically come and go together as an amicable pair, but they are not inseparable. Certain kinds of statements are factually accurate but likely to lead to inaccurate understandings among nonexpert readers. Consider these two statements:

1. Josie's score on the Woodcock-Johnson IV Spelling test was 95, which corresponds to a percentile rank of 37.
2. Josie can spell about as well as most children her age.

The first statement is quite precise, but not particularly clear—at least not to an audience of nonexperts. One can imagine the thoughts of an intelligent but psychometrically naive parent:

> What is this test, the Woodcock-Johnson Eye-Vee Spelling test? Does it tell us all we need to know about a person's ability to spell? Is 95 a good score? What is a percentile rank? Does that mean Josie came in 37th place? … 'cause there aren't that many kids in her class. Or does it mean she got 37% correct? That does not sound like a good performance—we called that an *F* when I was in school. That's the thing about spelling tests, if you don't study in advance, you can really bomb 'em. I know a few times I sure did. Did Josie have the opportunity to study the spelling words in advance? If not, I don't see how the test is fair.

The second statement avoids these possible sources of confusion. Although it is in some ways less precise than the first statement, it has the virtue of being easy to understand correctly, keeping the focus squarely on what the reader actually needs to know (i.e., that spelling is not a problem for Josie).

Extensive Documentation Versus Effective Communication

Imagine that you are giving a presentation about a topic about which you have considerable expertise. You start to give the presentation in your typical style, but it quickly becomes clear that your audience is highly skeptical about the depth of your knowledge, actively questioning that you know what you are talking about. After almost every statement you make, someone in the audience interrupts with statements such as "I doubt that very much. Can you back up your claim with evidence?" How would your presentation style change? If you address each person's doubts, it is unlikely that you will be able to finish your presentation as you intended it. Most likely you are going to adopt a defensive stance, only making claims that you can defend with absolute certainty. Furthermore, to substantiate your claims, you will need to go into considerable technical detail that your audience will not be able to understand.

When you first learned to write reports, your instructor was most likely a scholar who stressed the importance of being able to justify each claim. Your instructor needed to

know that you were able to interpret observational and test data correctly. Your reports were written to an audience (i.e., your instructor) who wanted you to "prove it!" Your instructor was probably a nice person with good reasons for asking you to be thorough, but he or she probably did not intend for this state of affairs to last for your entire career. However, for many of us, there is still a hard-nosed internal skeptic looking over our shoulder and making negative comments as we try to write something helpful:

> Shawn's anxiety about performing well in his college courses is so extreme that he often fails to demonstrate all that he knows on exams. (Really? How do you know?) Shawn expressed on numerous occasions that he is so worried that he will fail on exams that it is hard for him to concentrate. (That is not very good evidence. People often have self-serving excuses for poor performance. Where is the evidence?) His parents have also observed his excessive anxiety about tests. (Again, parents like to put the best spin on things. Give me better evidence! Something solid!) Furthermore, his test anxiety was plainly evident while he completed many of the tasks during the evaluation. (Wait a minute! Haven't you heard of the Yerkes-Dodson Effect? Sometimes anxiety enhances performance. How you do know something like that didn't happen?) On several occasions, he made careless errors because he was so focused on appearing to do well instead of on the task at hand. (Still not buying it … Where is the study that tells us that a few careless errors in the assessment environment have any relation with future behavior? You'll need some hard evidence; otherwise, this is all just subjective interpretation.). Several studies, dating back at least to the 1970s (e.g., Hill & Eaton, 1977), have shown that test anxiety under laboratory conditions is associated with careless errors …

Removing the interjections from this paragraph does not make it read much better. It will not take long before readers intuit that the paragraph was not written for them, and they begin to tune it out. What is interfering with Shawn's performance on exams is also here interfering with effective report writing. The internal skeptic has a role to play, of course. It is entirely appropriate—even essential—to only present conclusions that are firmly backed by relevant evidence. However, this does not mean that we are required to explain, in minute detail, exactly how we know that the evidence for our conclusions is rock solid. In most cases, the need for extensive documentation leads us to belabor the obvious and, ironically, undermines our credibility because we sound so defensive.

If sensitive interviewing, close observation, and test data all point to the same, carefully reasoned conclusion, what is the harm in getting straight to the point? If we thank our internal skeptic for helping us arrive at a firm conclusion but set aside its demands for a delineated proof, we are now freed to communicate something much more important—a vivid and empathy-inducing illustration of what Shawn is facing, with clues that lead the reader to anticipate what is needed to help him:

> Shawn's performance in his college courses is slipping, and he worries about it constantly. His sense of self-worth as a student and as a person is closely tied to how well he performs. Although at first reluctant, he eventually disclosed to me the deep disappointment he feels when he falls short of his expectations on exams.

Even when he is in the middle of a test, he anticipates the humiliation he will feel if he performs poorly. He imagines that his peers and professors will lose all respect for him. Furthermore, although he knows that his parents love him no matter what, he imagines that they pity him, and this is what he dreads most of all.

With so much at stake, he finds it nearly impossible to turn off his worrying thoughts. He vividly imagines worst-case scenarios of public failure and dishonor, accompanied by a relentless barrage of self-criticism (e.g., "You aren't ready for this. You didn't study hard enough and now everyone will see what a loser you are … You aren't really college material.").

He struggles hard to set such intrusive thoughts aside, but they come to him almost automatically, constantly disrupting his attention to the task at hand, leading him to make frequent careless calculation errors in math classes and word omissions and other grammatical errors on essay exams. Even on multiple-choice exams, he sometimes misreads answer choices and interprets them as saying the opposite of what is actually written. Most of the time he catches his own mistakes, but when he checks and rechecks his work, he often works slowly or loses track of time. Fear of running out of time during exams has lately caused him to check and recheck the clock frequently, which has now become a further source of distraction.

His fear of failure has worsened in the last year, so much so that he has become anxious about his own anxiety. That is, he worries that his worry will be uncontrollable, inevitable, and overwhelming, leading to a full panic attack in the middle of the exam in front of his peers. He is convinced that his classmates closely monitor his visible signs of anxiety, such as his sweat, tense posture, clenched fists, nervous leg shaking, and red blotches on his face and neck. He disclosed that recently he showed up for an exam and pretended to be too ill to take it. Because of his outward signs of discomfort and anxiety, his professor believed that he was truly ill and let him reschedule the exam for a later date. Though he felt a temporary sense of relief when he returned to his dorm, he spent the day feeling guilty about the deception and promised himself that he would never do so again.

Chronological Structure for the Writer Versus Narrative Coherence for the Reader

Most assessment reports are highly structured documents, with multiple levels of headings that make it easy to find particular kinds of information quickly (see Rapid Reference 1.1). However, the way a report is structured puts subtle constraints on what and how it communicates. A common practice is to write the report in roughly the same order in which the assessment process unfolded. First, there was a referral. Then an interview was conducted in which background information was obtained. Then came the testing, with some behavioral observations along the way. Then the observations and test data were interpreted. Then the information was summarized, perhaps leading to a diagnosis. Finally, recommendations are made.

≡ *Rapid Reference 1.1*

Components of Typical Reports

- Title or heading
- Identifying information
- Reason for referral
- Background information
- Tests administered
- Behavioral observations
- Test results and interpretation
- Summary and diagnostic impressions
- Recommendations
- Psychometric summary of scores

≡ *Rapid Reference 1.2*

John Willis writes a self-published newsletter called *Report Comments* that is full of sharp-witted humor, delightfully apt quotations, and—we do not use this term lightly—actual practical wisdom on how to write great reports. In an extended interview with W. Joel Schneider, John shared much of what he has learned about assessment over the course of his career. Many of John's insights derived from his newsletters and from the interview have been integrated into various parts of this book, but with less grace and charm than the original source.

John Willis structures his reports with similar sections and headings but he made an important revision to their organization (see Rapid Reference 1.2). For a long time, he wrote reports with the traditional chronological structure and was annoyed that often teachers and other professionals at IEP meetings quickly skimmed or skipped over his carefully written report details and went straight to the summary and recommendations at the end of his reports.

After musing over why this skimming so often occurred, he came to a rather magnanimous conclusion: They were not doing it wrong; he was. The traditional report order makes quite a bit of intuitive sense for the *writer*. After all, that is the story of what happened throughout the assessment. However, this structure is not necessarily optimally suited for the typical *reader*. A lot of twists and turns can happen over the course of an assessment, not all of which are particularly relevant. If we first write what happened and then figure out what it all means, we will inevitably include quite a bit of information that diverges and distracts from the main conclusion(s) of the report. This meandering can be

quite confusing to readers, who assume that every detail in the report was included for an important reason. Because we spend hours poring over data and details, and because we know which conclusions those details are leading to, it might not occur to us how difficult it is for most readers to keep everything straight in their heads as they read section after section and page after page of seemingly disconnected details.

> **C A U T I O N**
>
> Readers of your assessment report don't need to understand the story of how you did your assessment, but they do need to understand the story of the person being assessed.

John now puts his summary, diagnostic impressions, and professional recommendations at the beginning of the report rather than at the end. This overview provides a unified narrative framework that helps the reader understand and remember the details as they are presented later in the report. Reports are not mystery novels in which the pleasure in reading is spoiled if we know how it ends. Ultimately, readers of our reports need to understand the story of the person being assessed, not the story of the assessment of the person. Regardless of the order, it is important to keep in mind that the main purpose of the assessment report is to address and answer the referral question(s).

> **DON'T FORGET**
>
> The main purpose of the assessment report is to address and answer the referral question(s).

Neat and Tidy Data Versus Thoughtful and Integrative Interpretations

Test data come in neat and tidy prepackaged structures: test batteries. For example, we can learn most of what we wish to know about a person's cognitive abilities from a particular intelligence test battery. These scores can be supplemented by more specialized cognitive ability test batteries. Academic achievement data also are often obtained battery by battery. Personality data are obtained questionnaire by questionnaire. What could be more natural than to present the findings in this manner in the report, battery by battery and questionnaire by questionnaire? Again, this order seems natural only to the writer, not to the reader.

Our readers do not know about or care about our test batteries. They do not know, and should not need to know, which data come from which battery or questionnaire. To ask them to keep these details straight in their heads is asking too much of them. It does not typically matter to most readers whether a conclusion came from a test, an observation, an interview, or a review of official records. For example, suppose after a brain injury, a formerly conscientious high school student has become forgetful, impulsive, and disorganized. A reader-friendly account of the student's impulsivity would integrate all relevant information into one section of the report. It is unhelpful to talk about the history of her impulsivity in the background information section, the observed impulsivity in the behavioral observation section, low scores on tests measuring impulsivity in the cognitive ability section, more observations of impulsivity that occurred in the academic achievement testing, self-reported impulsivity on the questionnaires, parent and teacher

ratings of impulsivity in their relevant sections, and additional comments on impulsivity obtained from follow-up interviews. Note that to read about this one behavior—impulsivity—as it is written here might not seem so confusing. However, there may be half a dozen other important behaviors that are relevant, too. If they are also reported section by section, battery by battery, the narrative thread of the report reads like tangled spaghetti.

Our readers do not need to know much about our tests, methods, and procedures. They mainly care about what it all means. This means that we must do the hard work of integrating information across all of the sources of information. Reports should be organized thematically, ideally connected by a small number of dominant themes (e.g., the diverse manifestations of depression in multiple areas of the person's life).

How to Fool Anyone, Including Oneself, with Smarty-Pants Jargon

> I prefer "whispered to herself" to "sub-vocalized," but maybe that's just me. "Sub-vocalizing" sounds to me like talking on the *Nautilus*. Some parents reading reports might agree.
>
> —John Willis (2006a)

There is a time and place for everything, including technical jargon. Assessment reports are not that place, not at any time. Yet, even we, who are careful gardeners of our prose, find little bits of jargon popping up like dandelions in our reports. What secret force makes writing this way so irresistible?

Let us face it squarely: Assessment professionals are by and large bright and capable people with advanced vocabulary and advanced degrees. Most of us try to be modest about it, but title and position come with certain benefits, privileges, and temptations that are hard to resist. One of them is that we can, with the right turn of phrase, communicate that we are important people with expertise that should not be challenged.

What could have been called *the ability to reason logically* is transformed into *fluid intelligence.* If *attention* is too plain, *executive functions* makes a report sound classy and a little mysterious. It's not a *reward*! Only philistines and troglodytes talk like that! It's called *positive reinforcement.* See how much better that is? Last, when we really need to pull out all the stops and be especially persuasive, let us not forget the enchanting allure of *neuro*-words (i.e., perfectly serviceable words made fancier by the prefix *neuro-*). The public likes nothing better than to listen to us wax *neuro*poetic about such things as *neuro*circuitry, *neuro*plasticity, and *neuro*diversity.

Professional jargon is not for just impressing others. It has a more insidious function: that of self-deception. Noted physicist Ernest Rutherford is said to have remarked that "an alleged scientific discovery has no merit unless it can be explained to a barmaid." Jargon is where assumptions begin, reasoning stops, and curiosity dies. Jargon is where pockets of residual ignorance can lurk unnoticed for decades. Are you bad at calculation? I wonder why—maybe you have *dyscalculia (dys* = "bad," *calculia* = "calculation"). There. We're done. Now it all makes sense.

Lest we be too hard on ourselves, it is good to remember that if we are not overbearing and use it in only small doses, many people are actually comforted and reassured when we

spice our speech with a bit of peppery jargon. It is a cozy arrangement: We pretend to explain the mysteries of being human, and they pretend that it means something to them. Musician Brian Eno (Sheppard, 2008, p. 401) called it the *last illusion*: the belief that someone out there "knows what is going on." It is also a cheap trick. See what happens when you take out all jargon from your reports. No one learns more than a teacher who is determined to actually teach. You might find that you and your readers understand what you are saying much more clearly. If you simply must sound sophisticated, you can always do so by having something substantive to say.

🐿 TEST YOURSELF 🐿

1. **It is generally better to write assessment reports very precisely with many supporting details, even if it may be somewhat confusing to a layperson. True or false?**

2. **Because assessment reports are mainly used to communicate between professionals within related fields such as psychology and education, it is acceptable to use commonly understood professional jargon in reports. True or false?**

3. **Which of the following is the best way to organize reports?**
   - (a) Chronologically (in the order that tests were administered)
   - (b) In order of largest to smallest test battery administered
   - (c) In order of importance, summarizing key findings first

4. **The test scores are the most valuable information gained from an assessment and should therefore be the main focus of most reports. True or false?**

5. **The main purpose of an assessment report is to do which of the following?**
   - (a) Summarize the test data
   - (b) Convince the person that he or she needs certain services or interventions
   - (c) Answer the referral question(s)
   - (d) Describe the individual's current circumstances and behaviors

6. **Reports are most useful when they are written at which of the following levels?**
   - (a) Individualized
   - (b) Mechanical
   - (c) Concrete
   - (d) Abstract

7. **What important aspect of report writing do we believe is commonly *absent* from most assessment reports?**
   - (a) Accuracy
   - (b) Empathy
   - (c) Thoroughness
   - (d) Condescension

Answers: 1. False; 2. False; 3. c; 4. False; 5. c; 6. a; 7. b.

Two

MAKE YOUR REPORTS CLASSY AND GORGEOUS

> Design and aesthetics matter, because form is not secondary to function; form is integral to function. A map cannot function if it remains unread. To truly engage map users requires that we present them with something worth looking at. Something that they will want to spend time studying. Something that acknowledges the human need for beauty.
>
> —Tim Wallace and Daniel Huffman (2012, p. 1)

O f the classical transcendentals, report writing is mostly about *truth* and *goodness,* but the role of *beauty* is not to be neglected. In reports, truth of observation serves to inspire goodness of action, but ugliness will undermine the message. Say it is shallow, call it unfair—but the appeal of beauty is a part of persuasion. Hard truths presented sloppily are easy to dismiss. A little professional polish in your writing signals competence and communicates respect. It is worth your time to make your reports aesthetically pleasing.

There are few timeless guidelines for making your reports more attractive—tastes differ and fashions change. Nevertheless, with a little practical knowledge about typography, you can markedly improve the appearance, readability, and persuasiveness of your reports.

DON'T FORGET

Expert Recommendations About Typography

In preparing this chapter we relied heavily on the freely available, wonderfully written, and aptly named book *Practical Typography* by Matthew Butterick (2010–2018), found at https://practical typography.com/. If you seek typographic communion with the mathematico-poetic soul of the printed word, Robert Bringhurst's (2012) *The Elements of Typographic Style* is a sacred text of the discipline.

THE MATERIAL INGREDIENTS OF BEAUTY

If you wish to make your report a thing of beauty, make your report with beautiful things. If your report is printed on cheap paper—without so much as a paper clip to bind the pages—you are communicating something about the worth of the document. Your report is likely to end up shoved in a kitchen drawer, crumpled up and lost amid old receipts, expired coupons, and stray rubber bands. Do not go gentle into that good night.

If you want your report to be stored in a safe place, a place of honor where it will be preserved and remembered for future encounters with other professionals, you will need to take proper precautions. First, make sure that you have a secret stash of slightly pricey, bright, opaque, thick paper, exclusively reserved for printing reports. Do not leave your precious paper in the printer, or your colleagues will waste it on all sorts of undeserving documents. The paper should not be at wedding-announcement levels of luxuriousness, but the quality should be a grade or two better than the paper you ordinarily use (see Rapid References 2.1 and 2.2 for suggested paper quality and size). If you observe readers running their fingertips over the page enjoying the texture, you have chosen well.

Your reports should come to work professionally dressed. That is, the first page of every report must be printed on official letterhead from your organization or private practice. What if you do not have letterhead? You need to get some—it is not that expensive. What if your organization does not have official letterhead? You need to lobby the powers-that-be to have some made. A report without official letterhead is not an official report—it is just a rough draft.

Signing your reports can be a soul-sustaining professional ritual—a private celebration that one project is ended so that others can begin. A thoughtfully styled signature is simultaneously personal and authoritative. Signing your name with an ordinary pen will not noticeably detract from the visual appeal of your report, but signing it with a really good pen unmistakably enhances it. Some of us keep mounted on our desk a well-balanced, embarrassingly expensive pen reserved exclusively for signing reports and, should the need arise, private correspondence with the Queen. Whatever you do, take pride in signing your name with style and flourish.

≡ *Rapid Reference 2.1*

Dimensions of Paper Quality

Brightness: High-quality paper reflects light well, creating greater contrast with black ink.

Opacity: Low-quality paper is somewhat translucent, whereas high-quality paper blocks out light.

Weight: High-quality paper feels thick and heavy.

Printer type: Laser printers work best with paper that is smooth, hard, and heat-resistant. Inkjet printers require paper with special coatings to make the toner ink dry quickly, with sharp edges.

≡ *Rapid Reference 2.2*

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Paper Size

In the United States, we like our measurements to be arbitrary and inconvenient (e.g., feet, pounds, and °F). True to form, we print documents almost exclusively on 8½″ × 11″ paper. The rest of the world finds this size and ratio to be odd and a little ugly, but we do not seem to be bothered by the world's disdain. With a discerning eye, one can see the hidden charms of a number like 11, but it must be conceded that 8½ is nobody's favorite. At any rate (or ratio), international paper sizes follow schemes that are much more rational. If you really want your report to look distinctive (in the US, at least), try printing it on the A4 paper size, which is a little narrower and a little taller than its US counterpart. The $1 : \sqrt{2}$ aspect ratio of the A-series makes it possible to waste no space when using a single page to fit two pages of material at half size or four pages at quarter size.

To ensure your report's lasting beauty, it will need a protective sleeve or a sturdy but handsome binding. Your clients know that they will receive a paper report, but they will not expect it to come in an attractive cover. It is a little more expensive, but is a classy move on your part—and always well received. Throughout all recorded history, there is no known instance of a beautifully bound report ever having suffered the indignity of being shoved in a kitchen drawer, forced to keep company with a sad collection of stale erasers, dried-out pens, old wall calendars, and a crusty green penny.

STYLISH CONSISTENCY MADE EASY

Most readers of our reports are not in a position to judge the quality of our work. They are, however, in the position to be turned off by sloppiness and inconsistency. If small in number, minor errors are generally tolerated—we are only human. However, a report filled with egregious typos, grammatical whoppers, incorrect test scores, and obvious signs of neglect is hard to take seriously.

> I still recall one principal telling the entire team that, if he could not trust the spelling in my report, he could not trust any of the information in it. This happened recently (about 1975), so it is fresh in my mind.
>
> —John Willis (2006b)

Less obvious is the problem of minor formatting inconsistencies. When some paragraphs have no space between them and others have varying degrees of white space, when some but not all paragraphs are indented, when the font size changes for no reason, when headings are bolded more often than not (but often not), and when table rows and columns are haphazardly sized, the resulting look is sloppy and unprofessional.

Consistent formatting is unlikely to elicit admiration and praise because, ideally, it draws no attention to itself. Yet, the quality and care that you put into the editing process has subtle effects on your credibility with your readers and your reputation with other professionals. By itself, good formatting cannot rescue a badly written report, but poor formatting can undermine the authority of a report that is otherwise authoritatively written.

If your reports are not so finely crafted, it is unlikely that anyone will tell you directly that your reports are ugly. Many people will not even notice the inconsistencies, at least not consciously. But at some level the sloppiness registers, maybe just as a feeling. Negative first impressions can be undone, but that takes some doing. Let there be no unnecessary barriers to professional rapport and effective communication.

C A U T I O N

Inconsistent formatting will make your report difficult to read and will detract from how well you are communicating.

Of course, you might think that this level of care sounds great as an ideal but is ultimately impractical. Indeed, if you think that it is unreasonable to expect a busy working professional to obsess over minor formatting inconsistencies, you are absolutely right. Reports can be long, highly structured, intricate documents. Even if there were time to do so, to make sure that everything is perfect, by hand, would require superhuman tolerance for tedium.

To illustrate, suppose that your report has a cognitive ability section and you want to place a bolded, centered, 14-point sized heading at the beginning of the section. If you type "Cognitive Ability," bold it, center it, and then increase its font size, it does not seem like much work. However, if the report has many such sections, you might not remember to do all three steps in exactly the same way every single time. More than that, your report probably has second-level headings (e.g., for different broad abilities) or even third-level headings, each with different formatting styles you have chosen. There are tables, table captions, table headings, table columns, table rows, table borders, and table notes, all of which need to be styled consistently. Do not forget figures and figure captions.

There is altogether too much to keep track of when you need to work efficiently. Many of these formatting chores can be substantially reduced with the judicious use of templates. However, even with templates, there are countless little things that need to be checked.

Fortunately, beautiful typographical consistency can be had for little effort. If you are like most people, you have not noticed a quiet revolution that has occurred in the world of word processing. It started decades ago with the typesetting program LaTeX and eventually spread to web design. Now it is a feature in all major word processing programs, including Microsoft Word, Apple Pages, Corel WordPerfect, Open Office, Office Libre, and Google Docs.

The new way to write is to keep the styling of your document strictly separate from the content of the document. What does this separation mean? It means that you do not make any low-level formatting changes as you write (e.g., bolding, italics, indentations, line spacing, and so forth). Instead of making specific formatting changes to each part of your document, you specify which role each part of your document plays (Is it a normal