

Executive Summary Grading/Assessment Rubric	
1. Effectiveness: (25%)	
<ul style="list-style-type: none"> a. The summary is influential and persuasive <ul style="list-style-type: none"> i. Arguments are well crafted ii. Good ideas are enthusiastically presented iii. Roadblocks and areas of uncertainty are reported honestly b. The significance of the report is clearly communicated. c. The response or action expected from the "executive" is clearly communicated. 	
2. Content and independence: (50%)	
<ul style="list-style-type: none"> a. The Executive Summary functions as a stand-alone document. <ul style="list-style-type: none"> i. The summary accurately reflects the content of the entire document (or the key points for the project decision). All major facts, findings, conclusions and recommendations are presented without distortion. ii. An executive who reads nothing but the summary will be adequately informed iii. Enough detail is given to substantiate the conclusions and recommendations, but not so much that the rest of the document is unnecessary. b. The introduction presents the purpose, the key issues, and any special conditions that the reader should be aware of. c. The conclusion presents a specific recommendation for action geared toward the audience, clearly defines what future steps are needed in both the short-term and long-term, and identifies who is responsible for implementation. 	
3. Communication*: (25%)	
<ul style="list-style-type: none"> a. Summary is well-written (concise, clear, organized). Audience and purpose were considered. Outlines were used to develop and refine the message. b. Summary is well-edited (free of grammatical / spelling errors) c. Good visuals and pictures are included to enhance communication of key points d. Length, style and word choice are appropriate for an audience of "decision makers" (A Design Review Board, which includes non-technical business/project leaders) 	

<u>Levels:</u>	0 Unacceptable/Insufficient (0)	2 Acceptable (~.75-.89)
	1 Needs Improvement (~.6-.74)	3 Excellent/Meets All Expectations (~.9-1.0)

Note: Each student must independently author an executive summary for each tollgate design report.

* When writing the Executive Summary it is best to keep the writing and style simple and concise. Following are a few reminders for good communications: [Whrp.org]

- Use simple short words unless only the long words fit your needs. Weed out unnecessary words, clichés and overused buzzwords.
- Keep sentences short (15-20 words).
- Avoid technical jargon and acronyms. If a technical word is absolutely necessary, define it for the reader. For instance if the research involves rubblization – explain it.
- Keep numbers simple. Round them off when possible (\$8.4 million instead of \$8,421,500). Use charts to show comparisons or trends.
- Substitute active verbs for “to be” verbs. For instance, “the program achieved its goals” instead of “program goals were achieved.”
- Write as you talk. Use everyday language. Read it aloud and make sure it flows well.
- Keep the tone friendly, informal, matter-of-fact.
- Use examples that are familiar to the reader.
- Remember to spell-check and proofread. Don't trust the Spellchecker alone.

Executive Summary Guidelines

[Compiled from various sources, including The Howe Writing Initiative at [Miami University](http://www.sba.muohio.edu) (www.sba.muohio.edu) and the Georgia State Univ. Business Communications Program (www-cba.gsu.edu)]

- After reading the executive summary, your audience should understand the main points you are making and your evidence for those points without having to read every part of your report in full. That's why they are called executive summaries -- the **audience is usually someone who makes funding, personnel, or policy decisions** and needs information quickly and efficiently.
- The **purpose** of an executive summary is not to convey everything, but to provide an overview or preview to an audience who may or may not have time to read the whole report carefully. Readers who want additional support or proof should read the entire document.
- A summary should be short enough to be economical and long enough to be clear and comprehensive. **Don't sacrifice meaning for brevity.** A short, confusing summary will take more of an executive's time than a somewhat longer but clear one. So make the summary concise, but be sure to show why you've arrived at your conclusions.
- The executive summary is usually **no longer than 10%** of the original document. It can be anywhere from 1-10 pages long, depending on the report's length.
- Executive summaries should **communicate independently of the report**. Ask someone not familiar with the report's examples to read your executive summary to see if it makes sense.
- The goal of an Executive Summary is to communicate in a simple manner so that the information **can be understood by all readers**, regardless of their knowledge or expertise.
- Approach the summary as if you were writing a letter to a non-technical friend or relative to solicit their help and support for your project. The letter should **describe the project and why it would be worthwhile for your friend to help you**...In the report you must describe things with precision, but in the summary you can use more visual language...Know the audience and write specifically to them. [Gil Baker, ME Advisory Board]
- An abstract is a shortened form of a work that retains the general sense and unity of the original. Generally, this definition could be applied to an executive summary with one major difference. An abstract is basically a miniature version of the original...it looks like the original. An executive summary goes beyond this: it **seeks to let the reader in on what the real significance of the report is--what is the reader expected to respond to?**
- Write the executive summary after you have completed the report and decided on your recommendations.
 - Review your project and determine what the key ideas or concepts are. Group ideas in a logical fashion and **prepare a point form outline of the summary**. Edit the outline to eliminate secondary or minor points; use your judgment to keeping the summary concise.
 - Determine whether subtitles, bullets, selective bolding or some other type of **organizational structure** will add to the clarity of your summary.