Identify reporting requirements

Before you begin to gather and analyze your data, consider how you can ensure your collection efforts will meet the reporting needs of your primary intended users.

From the very beginning, reporting is an integral part of evaluation which allows you to:

- communicate what you do;
- monitor and track progress;
- demonstrate impact;
- document lessons learned;
- and be accountable and transparent to donors, partners and benefiting communities.

"Evaluation reports may be the only lasting record of a programme or project, including the results achieved and the lessons that were learned from its implementation" (Oxfam Evaluation Guidelines p.11).

Different groups of primary intended users will have varying needs for the evaluation report. When your evaluation plan was developed at the beginning of the process, you should have determined the different groups of primary intended users and begun to ask questions about how the report could be most useful. This information should then be reviewed periodically. Once the reporting deadline nears ensure there is clarity on each of the stakeholder groups' reporting requirements (what needs to be reported and when).

Some questions that may arise include:

- What do you need to include in different kinds of reports?
- At what point do you need to get feedback on your findings - and from whom?
- Will your findings be presented in draft form?
- Are you willing to share draft findings?
- Will you have any influence over the way the findings are re-presented?

Reporting timelines often present a major constraint on the evaluation plan. In particular, the need to report findings in time to inform funding decisions for the next phase of a program often means that reports are needed before impacts can be observed. In these situations, it will be necessary to report on interim outcomes, and to present any research evidence that shows how these are important predictors or pre-requisites to the final impacts. (See the tasks Develop Program Theory/Logic Model and Collect and/or Retrieve Data for more information on this).

Work with the intended users to determine key points in their own reporting and project cycle. For example, the evaluation may be a necessary part of their legislative requirement for an annual review. If that is the case, you need to know their time and internal pressures. Alternatively, they may be presenting at a major conference and want an update from the evaluation team.

With the primary intended users, their learning needs, and their timelines in mind, develop a communication plan to guide the evaluation reporting process. A communication plan can be as simple as a table that organizes this information. Use the communication plan to align data collection activities with reporting needs and to prioritize the time spent on reporting. (Consider the full range of reporting mediums before finalizing the plan. Not everyone will want a full technical report. For ideas on how to make your report more creative, go to the Develop Reporting Media task page.)

Methods

- Communication plan

  A communication plan outlines the strategies that will be used to communicate the results of your evaluation.

- Reporting needs analysis

  Conducting a needs analysis with your client to determine their reporting requirements.

Resources

Guides

- Designing and conducting health systems research projects Volume 2: Data analyses and report writing

  This guide provides 13 modules designed to demonstrate aspects of data analysis and report writing.

- Evaluation strategies for communicating and reporting: guide

  This book from Torres, Preskill and Piontek has been designed to support evaluators to incorporate creative techniques in the design, conduct, communication and reporting of evaluation findings.