Checklist for Straightforward Evaluation Reports

Kelly N. Robertson & Lori A. Wingate | Version 1.1 | December 2016

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Tips for Presenting Content

Straightforward evaluation reports are concise, easy to understand, and easy to navigate.

- Use short sentences, communicating one idea per sentence.
- Use plain language and avoid jargon.
- Use acronyms sparingly, and write the full phrase when first used.
- Use bulleted lists, tables, figures, and other alternatives to running text to draw readers' attention to key points and make complex information more digestible.
- Label each figure (graphs, charts, maps, pictures) with a title and separate takeaway message.
- Ensure report is readable by intended audiences—consider reading level, language, color, and visual accessibility.
- Use concise and descriptive headings and subheadings to clearly identify report sections.
- Differentiate heading levels consistently through variations in font size, bolding, italics, or indentation.
- Number all pages.
- Minimize report length as much as possible without compromising quality.
- Use callouts to highlight important information and takeaway messages.
- Place information critical for readers' understanding of the evaluation process and results in the report body and supporting details or documentation in the appendices.

In the main checklist, which begins on the next page, a paperclip symbol appears next to items that could be addressed partially or entirely in appendices.

Checklist for Straightforward Evaluation Reports

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This checklist provides suggestions for the content and organization of long-form evaluation reports that are concise, easy-to-understand, and easy-to-navigate. **The checklist is not a rigid set of requirements, but rather a compilation of suggestions** based on evaluation literature, the authors' experience, and input from experts. An evaluation client's or sponsor's requirements for reporting should take precedence over this checklist's recommendations.

REPORT FRONT MATTER

TITLE PAGE

The title page conveys basic information (who, what, where, when) about a report and makes it easy to reference.

- ☐ **Report title**: Present an informative title of 6 to 12 words. Include the word *evaluation,* project name, and when the evaluation was conducted in relation to the project timeline—such as annual, mid-term, or final report.
- ☐ **Individual to whom the report is submitted**: Include the name, title, organization, and contact information.
- ☐ **Author submitting report:** Include the name, title, organization, and contact information.
- ☐ **Date report submitted to client**: Include the month and year.
- ☐ **Preferred citation for the report:** Provide complete reference information so the report may be cited.

TABLE OF CONTENTS

The table of contents helps readers locate information contained in a report.

- ☐ **Multilevel headings:** Include at least all first- and second-level headings with corresponding page numbers for sections included in the report body and appendices.

Tips

- Recommended length: Up to 1 page
- For shorter reports, place table in a sidebar on the first page.
- A table of contents is not necessary if the report is 10 or fewer pages.

EXECUTIVE SUMMARY

The executive summary is a concise overview of key information from each section of a report. It is typically the most widely read section of a report and therefore should highlight the evaluation's conclusions and recommendations.

Tips

- Recommended length: 1–3 pages
- Prepare as standalone document—it should make sense when read apart from the full report.
- Include each evaluation question followed by corresponding findings and conclusions.
- Do not present any information that is not included in the main report.
- In addition to the executive summary, consider creating a 1-page *main messages* document for decision makers that communicates the most important conclusions and recommendations.

REPORT BODY

PROJECT BACKGROUND

The project background section includes details about the project that was evaluated so that readers have a basic understanding of what it is about.

- [ ] **Rationale and purpose:** Identify the problem or need the project is addressing, its goals, and the target audience or conditions intended to be impacted by the project.
- [ ] **Description:** Identify the funders and organizations involved in the project and their respective roles. Describe the project's main components, activities, deliverables, and intended outcomes. This description should reflect what was actually implemented, not just what was intended.
- [ ] **Context:** Discuss the economic, political, environmental, cultural and social contextual factors that affect the problem and the project.

Tips

- Recommended length: 1–3 pages or about 10% of the report body
- If the project has a logic model or theory of change, include it here.
- If the report is intended to inform replication of the project, report the total amount of project funding, as well as monetary and in-kind contributions.
- As needed, use visuals to illustrate complex aspects of the project, such as timelines, organizational relationships, or location of activities.

EVALUATION BACKGROUND

The evaluation background section identifies key factors that influenced the planning and implementation of the evaluation. This information helps readers understand the evaluation's context, as well as the opportunities and constraints that affected decisions about the evaluation.

- [ ] **Purpose:** Identify why the evaluation was conducted and how it is intended to be used.
- [ ] **Scope:** Identify the boundaries of the evaluation in terms of time period, location, and the project components and aspects of project performance that were evaluated.
- [ ] **Stakeholder engagement:** Identify groups impacted by the project and describe the extent to which and how they were involved in planning or conducting the evaluation.
- [ ] **Budget:** Report the total funding for the evaluation and the percentage of the overall project budget it comprises.
- [ ] **Evaluation team positioning:** Indicate whether the evaluation team is internal, external, or a combination of both.
- [ ] **Conflict of interest:** Identify any real or perceived conflicts of interest and describe how those were managed.

Tips

- Recommended length: 1–2 pages or 5% of the report body
- Identify and reference prior evaluations of the same project and summarize key takeaways and implications for the current evaluation.

EVALUATION METHODS

The evaluation methods section includes details about how the evaluation was implemented to bring transparency to the evaluation process and help readers assess the evaluation's rigor and credibility.

- ☐ **Approach:** Identify and briefly describe the evaluation model or framework that informed how the evaluation was carried out. 📎
- ☐ **Evaluation questions:** Identify the main questions addressed by the evaluation.
- ☐ **Criteria:** If not obvious from the evaluation questions, identify the project dimensions that were measured to assess its quality and answer each evaluation question.
- ☐ **Indicators:** Identify the data points used to measure the project's performance in relation to criteria and evaluation questions.
- ☐ **Data sources:** For each indicator, identify where information was obtained, such as types of individuals, documents, or institutional database.
- ☐ **Data collection methods:** Describe how information was gathered from the identified data sources.
- ☐ **Timeline:** Identify when the evaluation was conducted and describe the sequence of evaluation-related events. 📎
- ☐ **Instruments:** Identify the tools used to collect data and include copies of instruments in appendices if possible; if not, provide a brief description of each instrument. 📎
- ☐ **Selection of data sources:** Describe the process used to select individual data sources, such as a census (including all possible cases) or specific sampling procedures.
- ☐ **Data characteristics:** Describe properties of collected data, such as response rates, respondent demographics, and document characteristics.
- ☐ **Analysis:** Describe the specific procedures used to transform raw data into findings—whether through quantitative manipulation or qualitative coding. 📎
- ☐ **Interpretation:** Describe how analyzed data were used to formulate conclusions that answer the evaluation questions.
- ☐ **Limitations:** Describe factors that may have compromised the accuracy of the data and the associated implications for the evaluation.

Tips

- Recommended length: 1–4 pages or 15% of the report body
- Use a table to succinctly show relationships between evaluation questions, criteria, indicators, data sources, and data collection methods.
- Include a copy of each data collection instrument in the appendices. 📎
- If relevant to stakeholders, document data management procedures related to the storage, archive, and access of collected data. 📎

EVALUATION RESULTS

The evaluation results section presents what was learned from the evaluation. Information should be organized by evaluation questions or criteria, rather than data collection methods or sources.

- ☐ **Evaluation questions**: Restate each evaluation question, then present separate findings and conclusions subsection for each question.
  - ☐ **Findings:** Present the analyzed data used to answer the evaluation question. If findings differ by site or demographic characteristics such as gender, race, ethnicity, education level, or socio-economic status, note the differences.
  - ☐ **Conclusions:** Clearly and concisely answer the evaluation question. To ensure transparency, explain or illustrate how decision rules were applied to the findings to reach conclusions. Discuss how the evaluation's limitations or variations in findings affect the strength of the conclusions.

Tips

- Recommended length: 1–5 pages per question or 65% of the report body
- Start each conclusion section with a sentence that directly answers the evaluation question. Consider highlighting this sentence in a call-out box.
- For each question, present separate subsections for findings and conclusions.
- Refer to relevant figures when presenting findings and conclusions and make sure they are self-explanatory since some readers will not read supporting text.
- If additional analyses were conducted that were not used to answer the evaluation questions that may be of interest to some readers, report the results in the appendices.
- Create a table to clearly illustrate the links between evaluation questions, findings, and conclusions. Consider including a version of this table in the executive summary.

RECOMMENDATIONS

The recommendations section presents suggestions for actions based on the evaluation's findings and conclusions that the project's decision makers should consider. Briefly describe the process used to identify recommendations and whether stakeholders were engaged in this process. *Note: Not all reports will include recommendations.*

- ☐ **Project recommendations:** Identify specific, feasible actions that stakeholders should consider based on evaluation findings. Provide a rationale for each recommendation.
- ☐ **Evaluation recommendations:** As appropriate, identify specific, feasible actions to improve future evaluations of the project.

Tips

- Recommended length: Up to 1 page or 5% of the report body
- Use bullet points.
- Separate recommendations for the project and future evaluations.

REPORT END MATTER

ACKNOWLEDGEMENTS

The acknowledgements section is a place to identify and thank individuals who contributed to the evaluation, whether directly or indirectly.

REFERENCES

If sources were cited in the report, the reference section includes information to enable readers to easily locate them.

Tips

- Recommended length: 1–2 pages
- Use a consistent reference style, such as that of the American Psychological Association.
- Provide hyperlinks for publicly accessible documents.

APPENDICES

An appendix contains supplementary information that is pertinent to the evaluation, but not critical to readers' understanding of the report. Not all elements below will be appropriate for all evaluation reports.

- [ ] **Evaluation plan or scope of work:** Include the document that outlines how the evaluation was planned to be conducted.
- [ ] **List of reviewed documents or artifacts:** Cite all artifacts or documents reviewed or other sources of information (e.g., bibliography of documents reviewed, databases) and how others can access those sources.
- [ ] **Consent and protections:** Include relevant Human Subjects Institutional Review Board documents and consent forms.
- [ ] **Data collection instruments and protocols:** Include data collection instruments and protocols, such as questionnaires, interview and focus group protocols, and coding guides.
- [ ] **Acronym list:** Acronyms should be used sparingly—only when term is used at least four times in the main body of the report. An acronym list is only needed if there are five or more acronyms used in the main report body.
- [ ] **List of tables and/or figures:** If there are 5 or more tables and figures in the main body of the report, include a list of their titles and corresponding page numbers.

Tips

- Each appendix should be referenced in the body of the report.
- The content and relevance of each appendix should be clearly explained at the top of each document.

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FEEDBACK

We invite your feedback and suggestions for improving this checklist: Please send them to info@evalu-ate.org

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RECOMMENDED RESOURCES

The following resources provide further details related to guidance included in this checklist. Resources that heavily influenced the content of this checklist are accompanied by an asterisk (*).

EVALUATION REPORTING

*Checklist 5: Preparing the Evaluation Report

Developed for evaluation consultants working for the International Labour Organization, this checklist identifies report elements and includes guidance for presenting the information. http://bit.ly/ilorep

Clear Writing Checklist

This checklist by the Centers for Disease Control and Prevention provides practical guidance about how to write concisely and effectively. http://bit.ly/cdccw

Data Visualization Checklist

This checklist by Stephanie Evergreen and Ann Emery is for developing high-impact charts and graphs. http://bit.ly/dvcheck

*Evaluation Report Checklist

This checklist by Gary Miron lists the essential components of an evaluation report. http://bit.ly/er-miron

Evaluation Report Layout Checklist

This checklist by Stephanie Evergreen includes very specific guidelines for enhancing the readability and visual appeal of evaluation reports. http://bit.ly/erlcheck

*How-to Note: Preparing Evaluation Reports

This brief guide by the United States Agency for International Development includes practical suggestions for developing reports that are clear, credible, and useful. http://bit.ly/usaidrep

*Reader-Friendly Writing – 1:3:25

This Canadian Health Services Research Foundation brief recommends that reports include a one-page list of main messages, a three-page executive summary, and a report body of up to 25 pages. http://bit.ly/chsrfrep

*What #TLDR Means for Your Report

In this blog post, Stephanie Evergreen provides tips on how to avoid the problem of "too long, didn't read." http://bit.ly/tldrblog

EVALUATION PLANNING

Evaluation Reporting: A Guide to Help Ensure Use of Evaluation Findings

This Centers for Disease Control and Prevention guide includes advice for enhancing evaluation use by engaging stakeholders, clarifying an evaluation's purpose, and understanding a report's target audience. http://bit.ly/cdcrg

Logic Model Template

Developed specifically for the National Science Foundation's Advanced Technological Education program, this worksheet includes descriptions of typical logic model components and question prompts to help users create a logic model. http://bit.ly/lm-temp

Evaluation Questions Checklist

The Evaluation Questions Checklist by Lori Wingate and Daniela Schroeter defines criteria for effective evaluation questions that can be used as a basis for reporting evaluation findings and conclusions. http://bit.ly/eval-questions

Data Collection Planning Matrix

This worksheet by EvaluATE shows how to set up a table that links evaluation questions with specific indicators, data sources, data collection methods, timing, and analysis. It can be modified as necessary for inclusion in the methods section of an evaluation report. http://bit.ly/data-matrix