BRUNER FOUNDATION EFFECTIVENESS INITIATIVES

EVALUATIVE THINKING

6. USING EVALUATION FINDINGS

Evaluation Reports

There are multiple ways to communicate about and use evaluation findings. Results of surveys, interviews, observations etc., can be incorporated into planning processes and as described in both previous and following sections, basic assessments of many organizational procedures can be undertaken to inform ongoing organizational practice. When a more complete evaluation is conducted however, for example of a specific program, the results of that evaluation are usually summarized into an evaluation report. The following provides some guidelines for completing a formal evaluation report, which by the way should be started during the data collection phase of evaluation.

Getting started is the hardest part. The following are important steps to help you initiate evaluation report writing.

1. Determine the needs, purposes and probable audiences for Evaluation Reporting. (Remember your key stakeholders here. How should you report to clients, staff, funders, others?)
2. Develop a report outline (be sure it includes the components identified in the next session).
3. Determine which reporting formats will be needed (written document, electronic document, written or electronic presentation materials, executive summaries, consumer reports, etc.) and develop a report production timeline with writing assignments, and a dissemination plan. Assign someone (or a team) the task of primary author(s) and the responsibility of final production.
4. Share the report outline, writing assignments, audience list, suggested reporting formats, proposed timeline, and dissemination plan with key stakeholders.
5. Revise the report outline and all other report plans to incorporate key stakeholder suggestions.

The only thing harder than getting started, is completing the report. Do the following to get the work done. *(Note the items on this list may need to be repeated or duplicated depending on decisions regarding audiences and needs)*

1. Report author(s) must complete their writing assignments so that all the report sections (according to the revised report outline) can be compiled by the staff assigned the task of primary author(s). (See following for a few more tips about writing report sections.)
2. Combine all the sections and develop the first report draft.
3. Share the draft with appropriate stakeholders
4. Make revisions as needed

This bulletin was developed by Anita Baker with Beth Bruner to help organizations integrate evaluative thinking into their organizational practice. After a successful effort to help organizations build evaluation capacity (see www.brunerfoundation.org for more information about REP 1996-2003), the Bruner Foundation has been working to help organizations use that capacity in other management areas. The Foundation continues pursuing its strong belief that using evaluation skills, specifically identifying key questions of substance, determining what data are needed to answer questions, gathering appropriate data in systematic ways, analyzing data, sharing results, and developing strategies to act on evaluation findings, is valuable in everyday work of organizations. The contents of this bulletin were influenced by the non-profit organizations in Rochester that are former REP partners and ongoing consumers of these efforts, as well as by the work of Michael Quinn Patton, Paul Connolly, Paul Light, and Peter York, and the many others who thoughtfully add to the evaluation and organizational capacity-building literature.

What are the Components of A Strong Evaluation Report?

Once data analysis has been completed, findings must be reported. As stated previously, this may take the form of brief memos, powerpoint presentations or even oral reports. But, the most common form for presenting evaluation results is the formal evaluation report. A strong evaluation report will include the following.

* Subject program description
* Clear statement about the evaluation questions and the purpose of the evaluation.
* Description of actual data collection methods used
* Summary of key findings (including tables, graphs, vignettes, quotes, etc.)
* Discussion or explanation of the meaning and importance of key findings
* Suggested Action Steps
* Next Steps (for the program and the evaluation)
* Issues for Further Consideration (loose ends)

If you are writing an evaluation report, be sure to develop an outline first and pass it by some stakeholders. If you are commissioning an evaluation report, ask to see a report outline in advance. If you are reviewing others' evaluation reports, don't assume they are valuable just because they are in a final form. Review carefully for the above.

Important Things to Remember About Report Writing

- **Follow the report writing outline** described above. Feel free to be somewhat flexible with the order, but don't leave out whole sections.
- **Make your own internal outline** including who is responsible for which sections. Be sure that you leave time for stakeholders to help you with editing/making revisions.
- **Be economical in your decisions about what to include** in your report. Shorter is better. Avoid excessive use of jargon.
- **Read your work** – if you can't understand it, chances are others won't be able to either. Think, in simple terms, about what you are trying to say, and then write that. Use complete sentences and standard English grammar conventions. You can rely some on bullets and be limited in your transitions, but be sure your reader can follow your logic.
- **Formatting is your friend**. Use headers and sections to help your reader know what is happening in your report. Be consistent about where and how they appear (centered, bold, underlined, side headings etc.). Number the pages. If you're generating a draft think about double-spacing.
- **Use tables and graphs** to help illustrate findings. All tables and graphs must have titles, labels and legends or footnotes so that they stand alone (see also the appendix to *Participatory Evaluation Essentials*, www.brunerfoundation.org)
- **Use quotes and vignettes** or snippets from field notes to illustrate your findings. Remember quotes should have quote marks around them and be attributed to the speaker (or type of speaker – e.g., a participant) or writer. If you are presenting field notes, be sure they are clearly identified and in context.
- Be consistent in your use of language, capitalization, punctuation etc. For the most part, evaluation reports should be written in the past tense – only report what you actually did and what you found. The action steps or Issues for Further Consideration sections can include references to future actions.
- **Do not introduce totally new topics into your report in the final sections**. Do not use the report to explain why you changed your design, what you didn't do, and what should be happening with a program regardless of the findings presented in the report.

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What Should Be Avoided When Reporting the Results of your Analyses?

1. **Including response rates and problems with your methodology as part of your findings**. Neither of these are actually FINDINGS. They belong in a description of methodologies.
2. **Reporting both numbers and percents unless one is needed to make the other clear**. Most of the time, numeric data are reported as percents because that is what most readers are accustomed too. But be careful not to use percents when you have a small set of data (for example, if you only interviewed 6 informants, don't report the percent who responded certain ways). For small data sets (less than 50) use numbers or meaningful categories such as all, some or most.
3. **Listing in a sentence or a table, all of the response choices for every question on a survey or record review protocol**. It is the job of the analyst to bring the readers' attention to what is important. For example, rather that stating that 15*% of the participants made no gains during the program, 20%of participants made 1 – 5 gains, 35% of the participants made 6 – 10 gains, and 30% made more than 10 gains;* point out the critical facts. *Almost two-thirds of the participants (65%) made more than 5 gains*; OR *A total of 85% made at least some gains*, OR *A total of 15% of participants made no gains during the program, and only 30% made more than 10*. Use the analysis plan you pre-developed to help guide how you summarize your findings. Present the data in such a way that readers can calculate findings on their own, but don't feel compelled to show every possible finding.
4. **Reporting your results with excessive precision.** Most of the time you can just round to the nearest whole number when reporting percentages. For example 68.473 percent of the participants would become 68% of the participants.
5. **Feeling compelled to keep your results in the same order as they appeared on the survey or the interview protocol**. It is the job of the analyst to order things in the best way to clarify the findings – you are NOT REQUIRED to present things in the order you asked them.
6. **Compartmentalizing your results.** It is distracting for a reader to see: *what the surveys told us, what respondents said in interviews, how our participants did on tests*, etc. Combine the information from various data collection sources to clarify relevant findings about the subject of your evaluation. Again it is the job of the analyst to show how information from a variety of data collection sources revealed important, actionable findings, or to clarify when and why there may be discrepancies in data collected via different sources. (For example you may ask participants and some significant others about the impact of a program on them – teenagers in a program and their parents or school teachers. You could find that teenagers thought the program was critically important while their parents weren't aware of this at all, or the reverse, or you could find that parents corroborated or expanded on the importance of the program described by the participants. Both are important and actionable findings.)
7. **Feeling compelled to use all of the information you collected.** Sometimes evaluation data collection does not work out as planned. In fact, research has shown that most evaluation studies vary significantly from original plans. So, don't use partial information or results of data collection activities that were problematic. (For example if you administered a batch of surveys and a few were filled out incorrectly or by people who should not have been in the target population – eliminate them.) Explain if needed, why information was discarded, but concentrate on findings that answer the key questions of your evaluation work. Sometimes you will also collect data that you realize later do not actually provide any additional insights regarding your key questions. You should always review it to inform your summarization process, but you can exclude it if it does not add any additional value. (Please note that this is very different from neglecting to present findings that are unflattering or unexpected.)
8. **Including any action steps or conclusions that are not clearly developed from your findings.** Any conclusions or summary statements that you make should be illustrated by actual data collection results.

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What should be done if evaluation results are . . .?

Negative – explain with as much certainty as possible what the results are and what they mean. If you have missed targets be clear about that fact and also clarify how negative the results are. (For example if it was expected that 85% of your participants would remain in the program through the 6 month period, but only 40% did, it should be explained that rather than having most participants complete the program, most did not .) If possible explain why you think the negative results occurred if the available data help explain this. (Don't blame bad program results on bad evaluation data collection techniques however. If the evaluation was badly constructed or carried out, redo it and then report about results). Definitely clarify the next course of action based on the results (e.g., the program will be discontinued, staff will change, more staff training will be incorporated, the target population will shift etc.). If possible and useful, clarify what did work and who it worked for – so that can be built upon in future efforts. Avoid the milquetoast approach (throwing in a good finding for everything that was negative – the analyst must try to give the stakeholders some overall judgments). Sometimes programs are reluctant to report negative results so they obfuscate them or eliminate them from reports. This is sometimes somewhat justified as there have been a series of misunderstandings and bad arrangements that have lead to the negative results. But it is most instructive to report as carefully as possible when things have gone wrong so that similar errors in programming (service delivery approach, staffing, target population selection) etc. can be avoided in the future.

Inaccurate – determine whether inaccurate results have been caused by faulty data collection, faulty data analysis or other evaluation mis-steps. If a report is released with information that is later determined to be inaccurate, an errata section can be released or reports can be recalled. It is uncommon to complete a full report when it is know that the results are inaccurate. Other strategies for communicating with stakeholders about why the results will not be available, such as meetings, should be undertaken.

Inconclusive – sometimes results do not indicated with clarity what judgments can be made or what next steps can be undertaken. If that happens to your results, present them in an unbiased fashion and indicated that no conclusions could be drawn from the information. Allow the reader to determine the significance of the information. If there is concern that the lack of conclusiveness is due to data collection of analysis problems, develop a plan to correct any evaluation procedures for future efforts. If the lack of conclusiveness stems from program challenges (such as major changes in staffing or service delivery), report that carefully and clarify what could be done to remediate the problem in the future.

Positive – as for negative results, explain with as much certainty as possible what the results are and what they mean. If you have exceeded targets be clear about that fact and also clarify how positive the results are. If possible explain why you think the positive results occurred if the available data help explain this. Some organizations believe that evaluation HAS to reveal problems and negative facts about programs and they automatically distrust positive results. Some programs set up designs that are so biased there is no possibility that anything but positive results will occur. Neither condition is valuable. If after careful data collection and analysis it is clear that the results are positive, report them and celebrate the accomplishment. As for negative results though, it is important to clarify the next course of action based on the results (e.g., the program will be continued without changes, new strategies staff or target populations will be tried etc.) Resist assuming that positive results suggest that the next iteration of the program can be conducted with many more participants (ramped up) or with new/different groups of participants. Design careful follow-ups. If possible and useful, clarify what did work and who it worked for – so that can be built upon in future efforts. As for negative reports, it is most instructive to report as carefully as possible when things have gone well so that similar programming choices (approach, staffing, target population selection) etc. can be tried again.

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Uses and packaging for evaluation findings
Most evaluation findings are presented via formal evaluation reports. These are usually written documents that include a cover page, attributions, table of contents and multiple sections describing what was done (methodology), what was found (results), what it means (discussion/interpretations) and what can be done (action steps/recommendations). Both internal and external evaluation reports can be developed, and it is not uncommon to also develop a brief "executive summary" with only minimum descriptions of the work and discussion/presentation of key findings. It is also common for multiple reports to be developed when there are multiple audiences such as staff, board, clients, larger "community." In addition to written reports, evaluation findings are also commonly disseminated via oral presentations, again differently to different audiences, and sometimes via more creative means such as on display posters, flyers, brochures, and bookmarks. Any of these dissemination forms (e.g., full versions or executive summaries of reports, presentation slides, brochures) can also be posted to websites and linked electronically. Organizations that regularly use evaluative thinking will do the following regarding development and dissemination of evaluation findings:

- **Develop a reporting strategy along with evaluation design**. Determine who needs to see and hear evaluation results – i.e., who the audiences are. (It may also be helpful to establish some general guidelines about reporting – e.g., executive summaries are always developed, or never developed, and findings always go to involved program staff before they are presented either in writing or orally to other stakeholders).
- **Figure out the best way to communicate about evaluation findings to those various audiences**. For example, if written reports are never used and un-necessary for documentation, find other ways – such as oral presentations, to present findings. Or, if board members always want both a written report and an oral presentation, be sure to factor in timing and skills required to get both of those accomplished. Make sure productive strategies are adhered to, and don't assume reporting is only about compliance (i.e., reporting OUT to stakeholders such as funders, board members or senior managers). If draft communication is needed, be sure to determine who should be involved, how they should respond to draft information, and how much time is available for response.
- **Plan for and allocate both time and financial resources to effectively communicate findings**. Development of reports and/or presentations takes both time and skill. It is often the most time-consuming aspect of evaluation. It should NOT, however, be seen as a task that should always be farmed out. The process of developing a written or oral report, is usually very instructive regarding what the findings are and what they mean.
- **Revisit the planned reporting strategy and make necessary changes**. Once evaluation projects are underway, it is common to recognize new audiences and/or additional reports that should be developed.

How Can Organizations Use Evaluative Thinking to Improve Communications and Marketing?
Beyond evaluation reports, organizations report lots of information about their services, operations etc. When they regularly use Evaluative Thinking, the following will be evident. Once again, planning and assessment are key.

- First of all, an organization that regularly uses Evaluative Thinking will HAVE a marketing and communications plan. That plan will be linked to the organization's strategic plan, and it will used to help the organization achieve its overall mission and objectives.
- The communications and marketing plan of an organization that regularly uses Evaluative Thinking will have been developed by multiple stakeholders including staff and board members and external technical assistance providers as appropriate.
- The effectiveness of the organization's marketing and communication plan (i.e., whether an accurate message is getting out and whether delivery of that message is furthering the mission of the organization) will be assessed.

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How to Use These Bulletins

The *Integrating Evaluative Thinking Bulletins* were developed in response to the continuing need expressed by nonprofit partners to clarify **how** to enhance evaluative thinking and put enhanced evaluation capacity to work. The bulletins are intended to do the following:

- Clarify what evaluative thinking is, why it is important, and who can do it.
- Provide direction regarding the use of the Bruner Foundation's Evaluative Thinking Assessment Tool to inform action plans that will enhance evaluative thinking.
- Describe additional ways that evaluation strategies can be used internally to increase evaluative thinking (e.g., evaluating the effectiveness of staff development efforts or collaborative ventures).
- Help organizations think about creative ways to present and use evaluation findings.
- Provide practical advice on how to hone analytical skills, and use Evaluative Thinking when making decisions about standard organizational procedures including governance, mission development, strategic planning, fund development, leadership, technology, human relations, staff development, alliances and business ventures.

There are 11 individual *Integrating Evaluative Thinking Bulletins* including this edition. They cover the following topics: evaluation basics and definitions, evaluative thinking basics and assessment of evaluative thinking, evaluation and nonprofit boards, commissioning evaluation, collecting, analyzing and using evaluation data, communicating about evaluation, evaluation and technology, evaluation and HR, evaluation and alliances, increasing participation in evaluation and sustaining evaluative thinking. Each bulletin is brief and replete with practical suggestions made by nonprofit partners who reviewed the work (including some very specific pointers highlighted in yellow). A complete set of all Bulletins, as well as other complementary tools and resources are available via the Bruner Foundation website, www.brunerfoundation.org. We encourage all users of the bulletins to:

- Familiarize (or re-familiarize) yourself with basic information about evaluation capacity.
- Orient yourself regarding the Bruner Foundation's Evaluative Thinking Assessment Tool and conduct preliminary assessment in your organization.
- Develop action plans informed by the suggestions found in the bulletins.
- Implement action plans to enhance Evaluative Thinking in your organization.
- Use these specific bulletins as reference materials when needed.
- Visit the Bruner Foundation website Effectiveness Initiatives pages (www.Brunerfoundation.org), to familiarize yourself with the history behind this effort and to access the tools and resources available there.

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