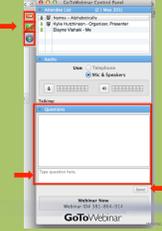




An Executive Summary is Not Enough
Alternative Reporting for Evaluators

Kylie Hutchinson
Community Solutions Planning & Evaluation

How to Participate Today



- Open and close your Panel
- Mute yourself
- Raise your hand
- Submit questions throughout or during Q&A's
- Ready?



Housekeeping



Poll Question

Where are you attending from today?

- British Columbia
- Canada
- United States
- International

Learning Objectives

State the role of communicating results effectively in good evaluation practice.

State 4 principles for effectively communicating your results.

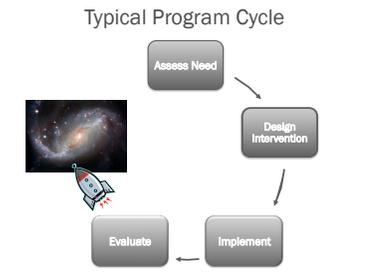
List three alternatives instead of, or in addition to, writing a final evaluation report.

Describe three new tips or practical resources for communicating your results.

Role in Evaluation

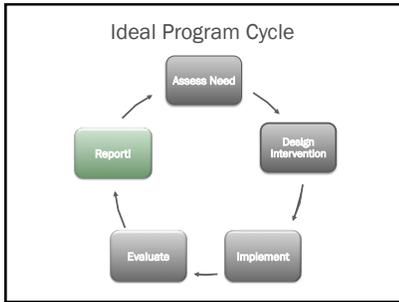


Typical Program Cycle

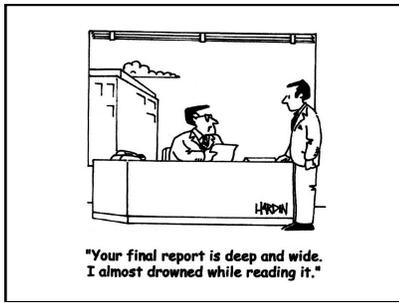


```

graph TD
    A[Assess Need] --> B[Design Intervention]
    B --> C[Implement]
    C --> D[Evaluate]
    D --> A
  
```



Why?



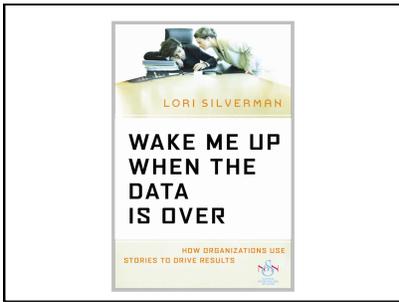
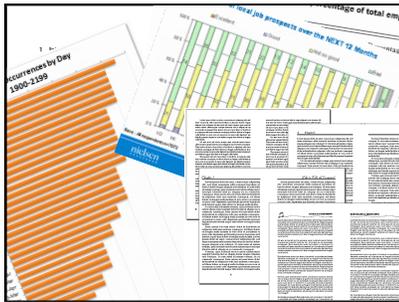
Poll Question

How tall is the stack of readings in your Inbox?

- a) 1 in.
- b) 1 ft.
- c) I'm ashamed to tell you
- d) I thought that was a plant stand!

number of minutes a day African politicians read

10



Lessons learned....aren't

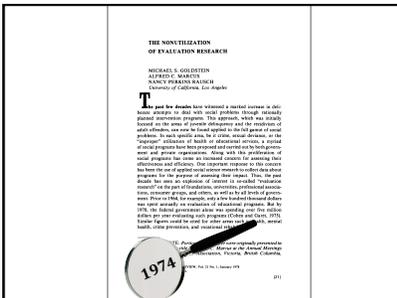


“...there are significant doubts regarding the ability of charitable organizations to discharge their basic responsibilities.”

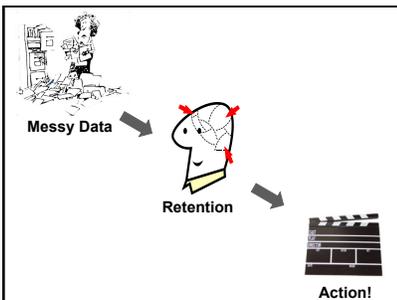
Public Confidence in US Charities (2006)

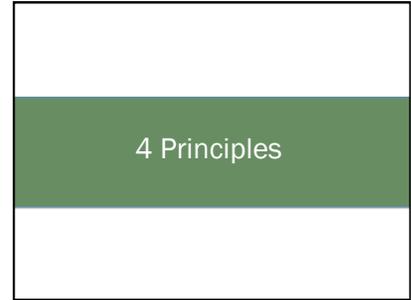
“Charitable organizations...need to do a better job of showing that they actually achieve their missions and produce measureable results.”

Public Confidence In US Charities (2006)



% evaluator's time spent writing a final report?
25 – 30%





Seven Questions to Knowing Your Audience

- What are they like?**
Demographics and psychographics are a great start, but connecting with your audience means understanding them on a personal level. Take a walk in their shoes and describe what their lives look like each day.
- Why are they here?**
What do they think they are going to get out of the presentation? Why did they come to hear you? Are they willing participants or mandatory attendees? This is also a bit of a situation analysis.
- What keeps them up at night?**
Everyone has a few pain points, a thorn in the side. Let your audience know you empathize—and offer a solution.
- How can you solve their problem?**
What's at stake for the audience? How are you going to make their lives better?
- What do you want them to do?**
Answer the question "so what?"—and make sure there's a clear action for your audience to take.
- How can you best reach them?**
People vary in how they receive information. This can include the set-up of the room to the availability of materials after the presentation. Give the audience what they want, how they want it.
- How might they resist?**
What will keep them from adopting your message and carrying out your call to action?

#2. Develop a Communications Plan

Stakeholder	Method	Timing	Budget	Priority
Program	Large poster in training room	End of study	\$\$	High
Participants	Results-briefings	Interim and end of study	\$	High
Program Staff	Two-page summary	End of study	\$	Medium
Senior Managers	Two-page summary	End of study	\$	High
Funder	Two-page summary Presentation	End of study	\$\$\$	High
Membership	Article in donor newsletter	Beginning and end of study	\$	Medium
Community-at-large	Press release Community forum	Beginning and end of study	\$\$\$	Medium

Table 1 Respondents' Perspectives Concerning Factors That Influence Use

	Influential to Extremely Influential (%) n = 897
Planning for use at the beginning of the evaluation	91
Identifying and prioritizing intended user of the evaluation	89
Communicating findings to stakeholders as the evaluation progresses	86
Identifying and prioritizing intended users of the evaluation	86
Involving stakeholders in the evaluation process	86
Developing a communicating and reporting plan	86
Interviewing the evaluator and organizational processes and procedures	83
Soliciting and using suggestions from stakeholders on the evaluation design	76
Designing the evaluation within resource limitations	74
Linking the evaluation to an established pattern of organizational life	72
Adhering to high standards of methodological rigor	65
Maintaining significant involvement in evaluation follow-up activities	65
Taking steps to prevent the misuse of evaluation findings	61
Demonstrating that the benefits of the evaluation will outweigh the costs	57
Establishing a balance of power among stakeholders	44

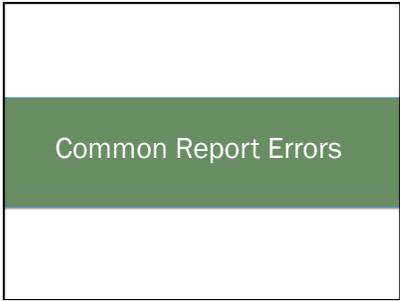
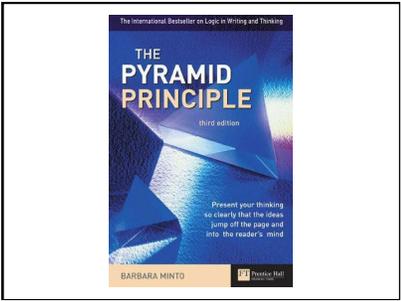
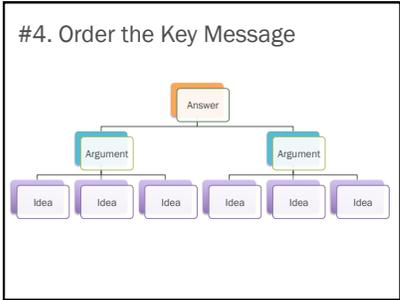
Note: The sample size varies across items. We chose to present the smallest sample size from the series of items as a conservative representation. This is the case for every table in the article.

Source: Fleischer, D.N., & Christie, C.A. (2009). Evaluation use: Results from a survey of U.S. American Evaluation Association members. *American Journal of Evaluation*, 30(2), 158-175.

#3. Layer the information

I just put our long boring report up on a buried web page in a format that requires it to be downloaded. Yet for some reason, nobody is reading it.

freshspectrum.com



1. Executive Summary too long
2. Too much jargon
3. Key findings hard to...find!
4. Reporting too much data
5. Waiting for the perfect data
6. Too much narrative
7. Ignoring formatting and design

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What do they need to know that you need to show?



Text Text

Executive Summary ES

88.8%

5,000

12,000

625,000

Dashboard Table

Source: Nate Waiarat, EMI Consultants

Matrix Dashboard

Executive Summary ES

78%

17.2

Sidebars Text

Source: Nate Waiarat, EMI Consultants

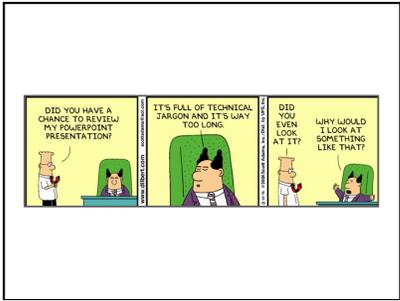


2012 Pilot Evaluation Results

	Outreach to customers	Pilot Operations	Risks to Verified Savings
SUCCESSSES	The Pilot manager has built lasting relationships with key stakeholders in the agricultural community including representatives of farming associations, government councils and extension centers.	The Pilot aligned its program with the Technical University program as a way to identify customers.	The Pilot manager is working closely with auditors to identify more opportunities for agricultural savings.
CHALLENGES	Only 2 of the 168 audits done by the Pilot in city territory led to an agricultural customer to supply for Pilot incentives.	The two elements of the Pilot, the audits and the rebate, are not well connected. As a result, no farmer followed up on the recommendations of the audits, almost all of the farmers that receive an audit do not apply for rebates.	Lighting measures account for the vast majority (98%) of electric savings from coordinated measures.

ES-1
Source: Nate Waiarat, EMI Consultants

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8. Others?



You don't understand my lingo?

Here, I'll say the same thing but slower and louder.



freshspectrum.com

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Editorial: Unlearning Some of our Social Scientist Habits

E. Jane Davidson
Davidson Consulting Ltd, Astoria/New Zealand

According to the organizational learning literature, some of the most important learning an organization can do is in the form of organizational unlearning—getting rid of erroneous or dysfunctional knowledge, habits, and practices. Simply adding new skills, behaviors, and ways of thinking isn't enough. Without some explicit attention to the process of unlearning, creative knowledge and know-how...

1. Including Models or Theories but not Using Them Evaluatively

Our social science training teaches us that theory's useful as useful as a good theory. Therefore, a common feature of evaluation reports is some sort of literature review and often the presentation of a theoretical model

State Demographic Evaluation

RESULTS *Your evaluation question*

Demographic information was obtained from program files for 126 clients. Many have previous data from previous years and are not included in this report. The data was analyzed for the following: age, gender, race, ethnicity, marital status, education, income, and employment. The data was analyzed for the following: age, gender, race, ethnicity, marital status, education, income, and employment. The data was analyzed for the following: age, gender, race, ethnicity, marital status, education, income, and employment.

Table 1: Age Distribution of Clients

Age Group	Program	Number	Percentage
18-24	Program A	15	11.9%
25-34	Program A	25	19.8%
35-44	Program A	35	27.8%
45-54	Program A	25	19.8%
55-64	Program A	15	11.9%
65+	Program A	10	7.9%
Total	126	100.0%	100.0%

Table 2: Client Gender

Gender	Program	Number	Percentage
Male	Program A	75	59.5%
Female	Program A	51	40.5%
Total	126	100.0%	100.0%

Table 3: Education Level of Clients

Education Level	Program	Number	Percentage
High School or Less	Program A	15	11.9%
Some College	Program A	25	19.8%
Associate Degree	Program A	35	27.8%
Bachelor's Degree	Program A	25	19.8%
Master's Degree	Program A	10	7.9%
PhD	Program A	5	3.9%
Total	126	100.0%	100.0%

Community Statistics | 8

State Demographic Evaluation

Figure 1 graphically displays the number of new clients with the program over time. The data shows a steady increase in the number of new clients over the period of the study. The data was analyzed for the following: age, gender, race, ethnicity, marital status, education, income, and employment. The data was analyzed for the following: age, gender, race, ethnicity, marital status, education, income, and employment.

Figure 1: New Clients, Next to Fall 2000

Table 4: New Clients, Next to Fall 2000

Month	Number of New Clients
Aug	10
Sep	15
Oct	20
Nov	25
Dec	30
Jan	35
Feb	40
Mar	45

Table 5: Client Income

Income Level	Program	Number	Percentage
Less than \$10,000	Program A	15	11.9%
\$10,000 - \$19,999	Program A	25	19.8%
\$20,000 - \$29,999	Program A	35	27.8%
\$30,000 - \$39,999	Program A	25	19.8%
\$40,000 - \$49,999	Program A	15	11.9%
\$50,000 - \$59,999	Program A	10	7.9%
\$60,000 - \$69,999	Program A	5	3.9%
\$70,000 - \$79,999	Program A	5	3.9%
\$80,000 - \$89,999	Program A	5	3.9%
\$90,000 - \$99,999	Program A	5	3.9%
\$100,000+	Program A	5	3.9%
Total	126	100.0%	100.0%

Table 6: Client Employment

Employment Status	Program	Number	Percentage
Unemployed	Program A	15	11.9%
Part-time	Program A	25	19.8%
Full-time	Program A	35	27.8%
Retired	Program A	25	19.8%
Homemaker	Program A	15	11.9%
Student	Program A	10	7.9%
Other	Program A	5	3.9%
Total	126	100.0%	100.0%

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But wait... there's more!

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1.33 Appendix W 33

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Community Statistics | 1



Introduction

Methods

Results

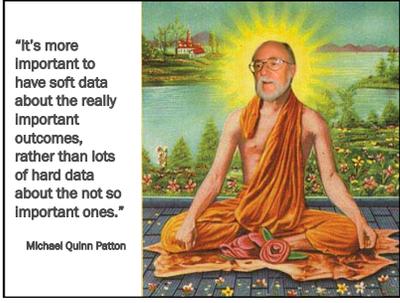
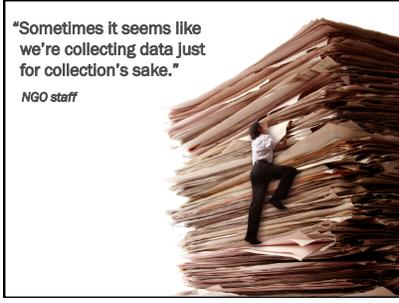
- Evaluation question #1
- Evaluation question #2
- etc.

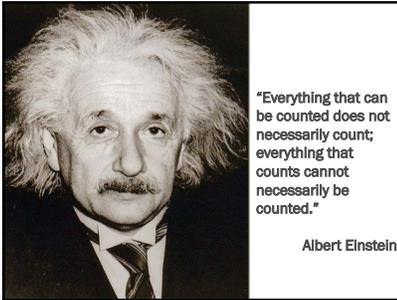
Conclusions

Recommendations

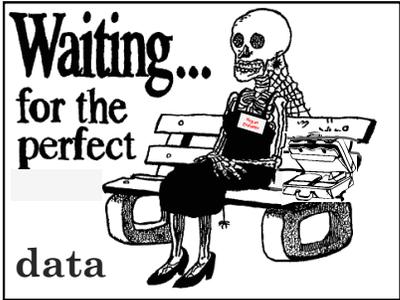
Appendices

1. Executive Summary too long
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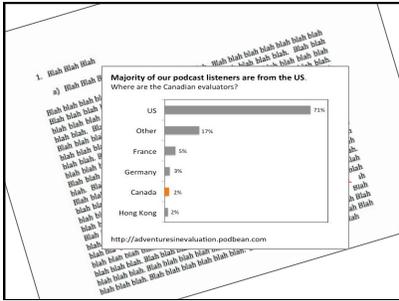




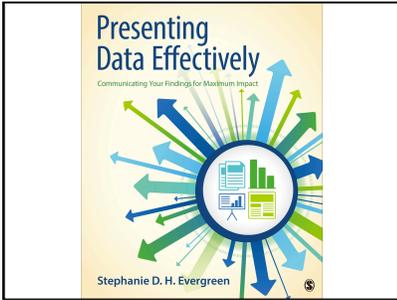
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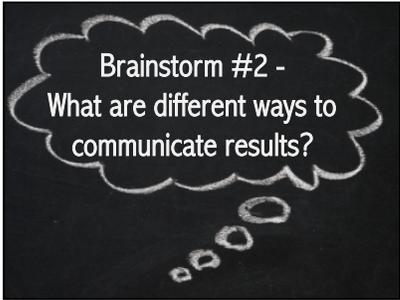
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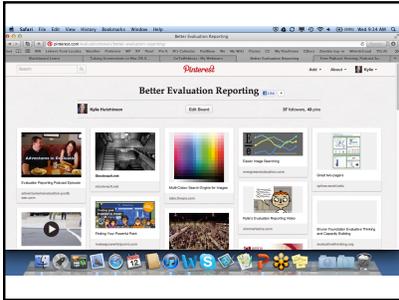
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8. **Others?**



Alternatives to the Final Report



Slides



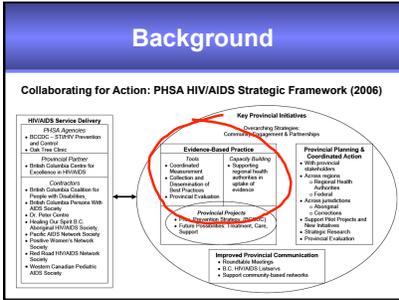
Before

Facilitating Outcome Evaluation Among HIV/AIDS Service Providers in BC

Presentation to the PHSA HIV/AIDS Program February 2008

Objectives for Today

1. Review results
2. Discuss draft recommendations
3. Confirm next steps



Project Objectives

- consult with HIV/AIDS service providers in BC regarding need for an outcome evaluation resource
- research other models of evaluation support across Canada
- make recommendations regarding a provincial evaluation resource

Methods	
Needs Assessment	Case Studies
<ul style="list-style-type: none"> • 66 stakeholders <ul style="list-style-type: none"> • ASOs • PHSA contractors • RHAs • Ministry of Health • PHAC • 15 phone interviews • 3 consultation sessions 	<ul style="list-style-type: none"> • 14 phone interviews <ul style="list-style-type: none"> • BC • Alberta • Ontario • nationally

- ### Basic Definitions
- **Process Evaluation**
 - focuses on how a program was implemented and operates
 - generates information for program improvement
 - **Outcome Evaluation**
 - determines extent to which anticipated outcomes were achieved
 - provides information about the impacts and effectiveness of a program
 - answers question, "What difference did it make?"

- ### Current Activity - ASOs & PHSA Contractors
- 
- no distinction between 'evaluation' and 'reporting'
 - little interpretation or use of data
 - not used for program planning

- ### Current Activity – Regional Health Authorities
- similar to ASOs
 - recognize need
 - old contracts not re-negotiated
 - quarterly reports from contractors
 - primarily outputs
 - summarize annually for Ministry of Health
 - interest in collective impact?
 - ASOs & RHAs
- 

- ### Challenges with Outcome Evaluation
- lack of:
 - time
 - staff
 - funding
 - knowledge & expertise
 - IT
 - common outcome measures
 - different reporting requirements & formats
- 

- ### Challenges
- don't hear back from funders → feels meaningless
 - challenges specific to HIV/AIDS
 - clients
 - measuring impact of prevention
 - broad range of services
 - rural services
 - high staff turnover

- ### Factors Facilitating Outcome Evaluation
- funding
 - staff time
 - required by funder
 - access to expertise
 - data collection tools
 - building evaluation into front-end of program
 - organizational culture that values evaluation
 - accreditation
- 

- ### Suggestions for an Evaluation Resource
- specific
 - financial resources
 - provincial evaluation resource person
 - standardized data collection & reporting forms
 - outcome evaluation software (e.g. HOMES)
 - information technology upgrades

- ### Options for BC
- 
1. Provincial evaluation resource person(s)
 2. Standardized online data collection and reporting
 3. HIV/AIDS specific accreditation

Specific Recommendations

1. Establish a Provincial Evaluation Working Group
 - broad membership including funders
 - discuss options
 - develop ownership of process
 - oversee development of a resource
 - supported by part-time coordinator
2. Recruit evaluation champions
3. Separate Funders' Sub-committee
4. Broad dissemination of this report



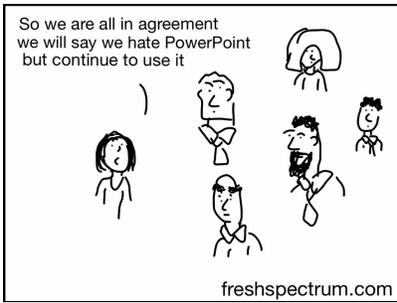
Recommendations for a Provincial Evaluation Working Group

1. Involve stakeholders from the beginning
2. Start small
3. Build on existing data collection and reporting tools
4. Budget adequately for
 - consultation
 - promotion
 - training (general & specific)
 - knowledge transfer




Next Steps

- Dissemination of report
 - share results
 - build support
 - recruit for working group

After

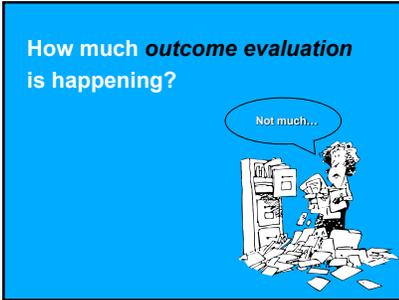
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An Evaluation Resource

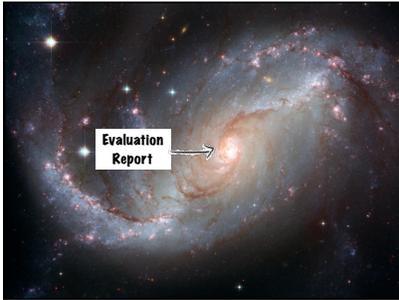
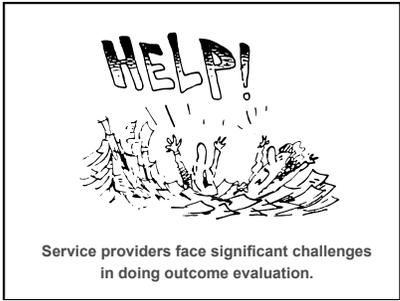
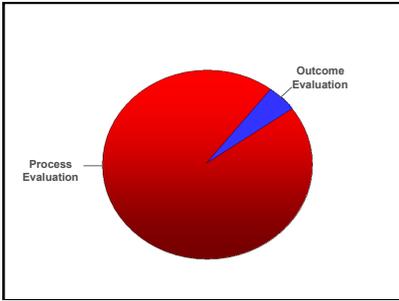
• for HIV/AIDS Service Providers in BC

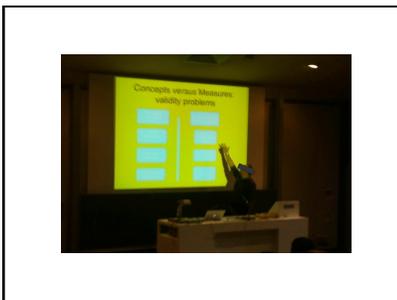
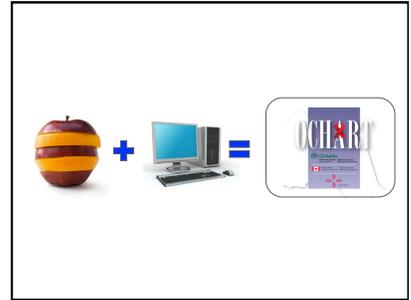






So What?







How?

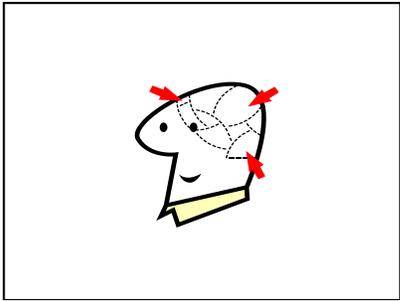
Number of points
that people can
remember

3-5

Number of repetitions
necessary for
integration

5-7

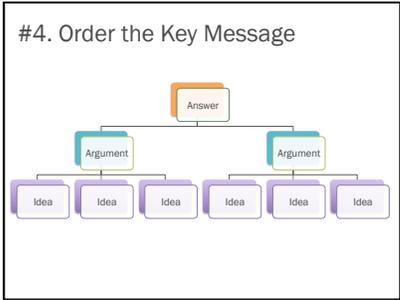
What do they
need to
know
that you need to
show?

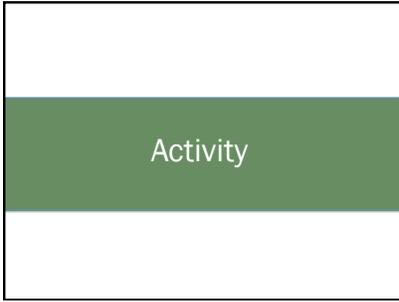


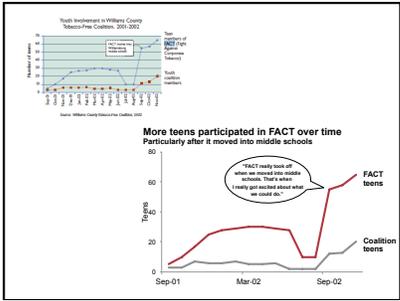
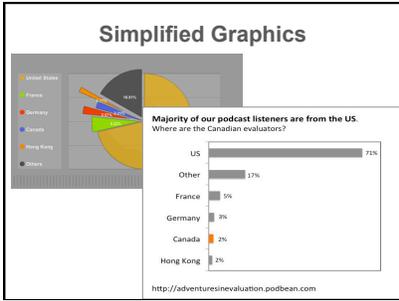
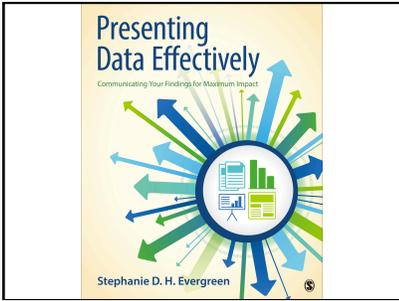
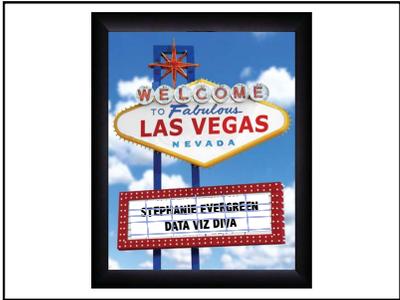
Turn off your computer



Right-brain thinking

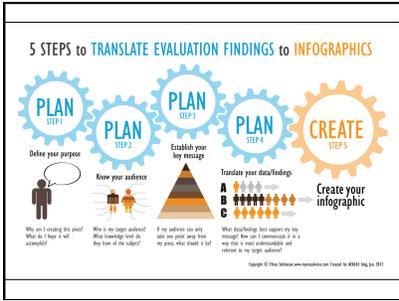
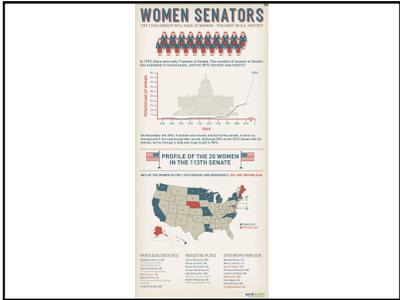






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Infographics



This is not your comparison...

Your infographic All infographics

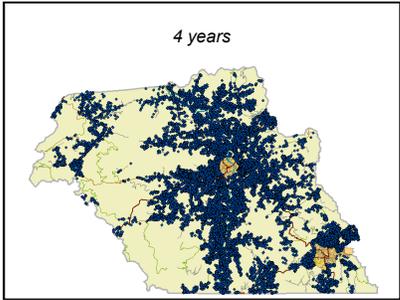
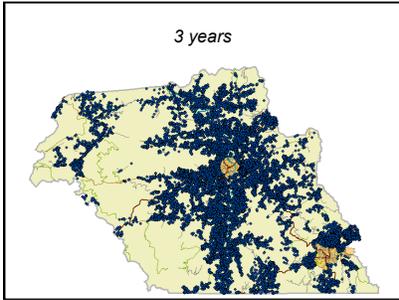
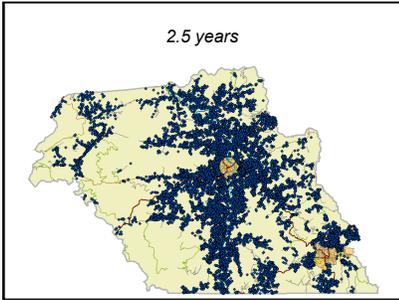
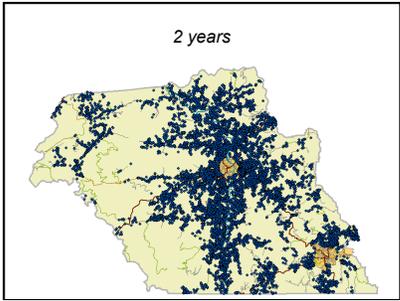
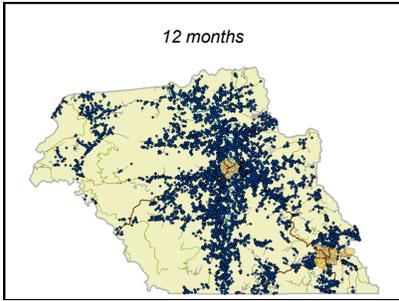
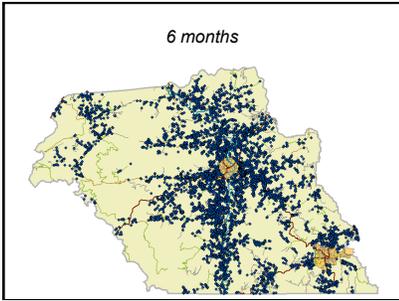
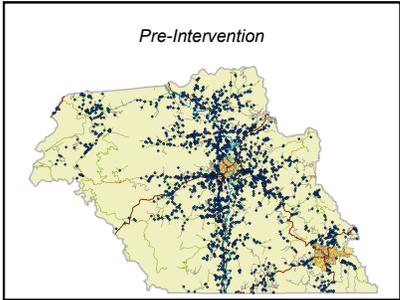
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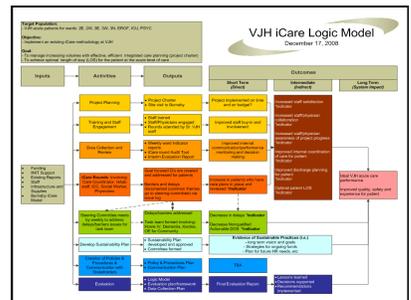
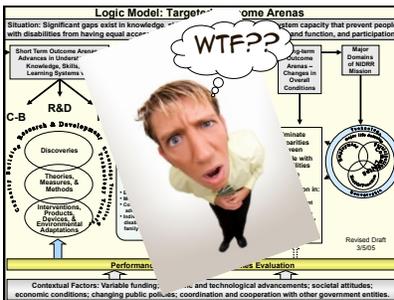
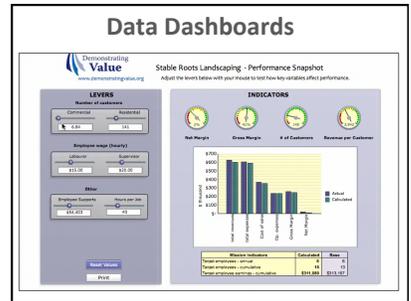
Your infographic Your 250 page report

freshspectrum.com



Mapping





Building a Culture of Evaluation

30 Ideas to Apply to Your Organization

INVOLVE STAFF TO INCREASE ENGAGEMENT AND OWNERSHIP
 Look for small successes.
 Start with simple, informal evaluations to demonstrate benefits and worth.

POSITIVE EVALUATION IS A KIND OF GIVING STAFF A VOICE
 Position evaluation as a part of ongoing trust management is listening.

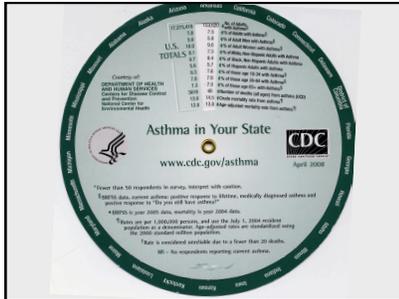
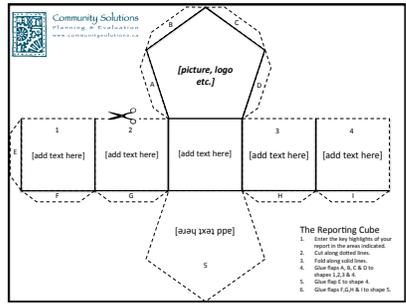
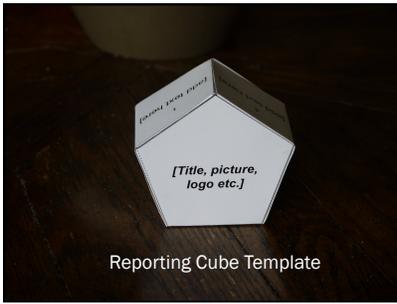
RESOURCE IT APPROPRIATELY
 Offer evaluation training to build capacity.
 Engage top-level leaders in the area of organizational culture change.
 Identify and reward evaluative "champions" at the senior level.
 Consider how to give you focus in evaluation.

COMMUNICATIONS STRATEGIES
 It provides them with positive material to promote the organization.

SCHEDULE TIME UP FRONT
 In the critical business period to discuss evaluation.

Inject the terms LEARNING ORGANIZATION into your persuasion efforts.

Be clear
 Label the subjects in focus. Use QR and QR just for fun!



How Much Do ASOs Evaluate Their Programs?

The ASO Program Health Services Research Program, funded by the CDC, is currently conducting a survey to determine how much ASOs evaluate their programs and how they do it. The survey is open to all ASOs and will run through the end of the year.

44% of ASOs evaluate their programs.

44% of ASOs evaluate their programs.

44% of ASOs evaluate their programs.

Storytelling

How did the program start and grow?

The program started in 2008 when the CDC funded a grant to support the development of a paint stewardship program in Oregon. The program was designed to help ASOs manage their paint inventory and reduce the amount of paint that ends up in landfills.

The program has grown significantly since its inception. It now serves over 100 ASOs and has helped them manage over 100,000 gallons of paint. The program has also been successful in reducing the amount of paint that ends up in landfills by over 100,000 gallons.

Division of Community Health (DCH): Making Healthy Living Easier

Success Stories

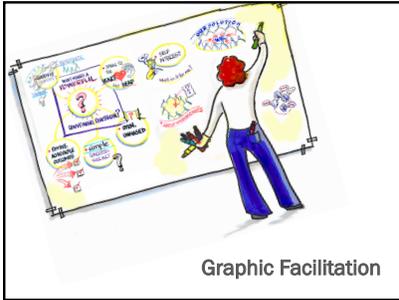
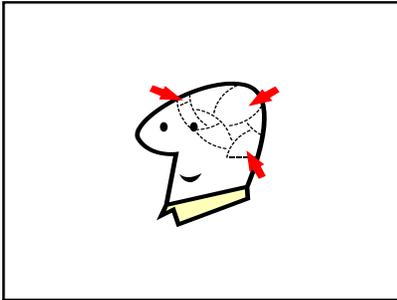
Success stories are all about the Division of Community Health's impact. It's a collection of stories that highlight the work of our staff and the impact of our programs. These stories are available in a variety of formats, including print and digital.

Resources

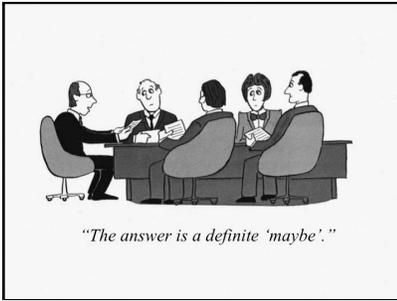
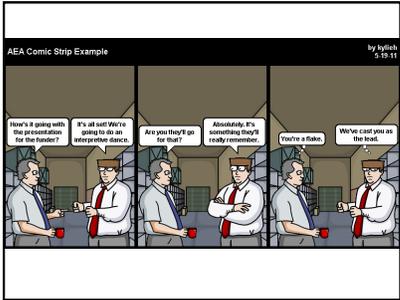
- Community Health Assessment (CHA) Toolkit
- Community Health Improvement Plan (CHIP) Toolkit
- Community Health Needs Assessment (CHNA) Toolkit
- Community Health Improvement Plan (CHIP) Toolkit

Contact Us

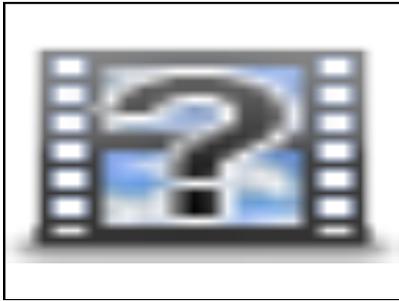
Division of Community Health
 4700 Sunset Blvd, Suite 1000
 Los Angeles, CA 90027
 Phone: (213) 338-1234
 Email: dch@dhhs.ca.gov



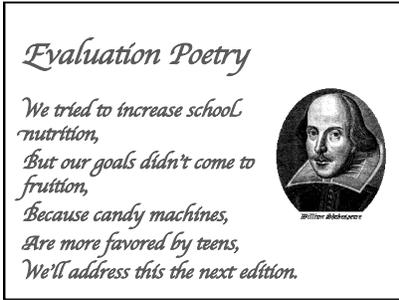
Graphic Facilitation



"The answer is a definite 'maybe'."

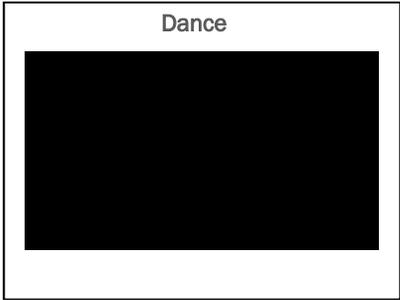


Press Releases

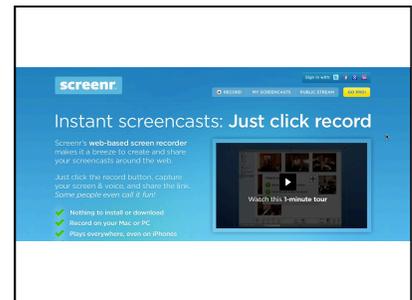
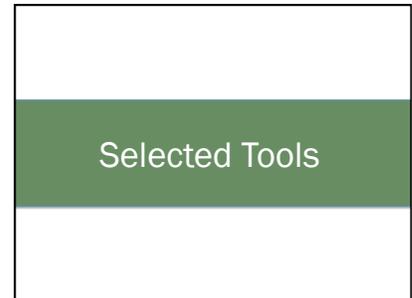
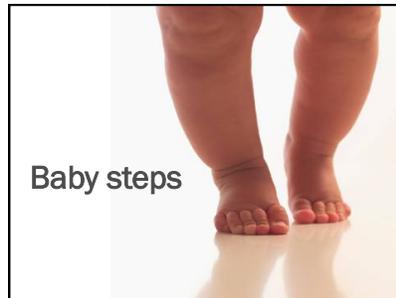
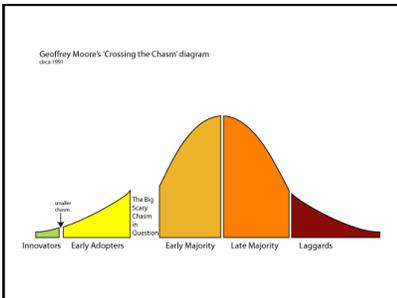
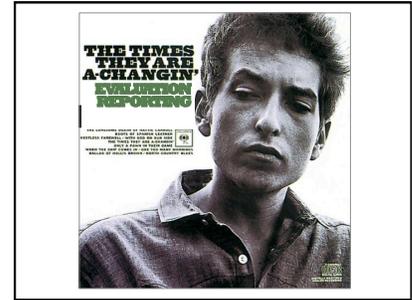
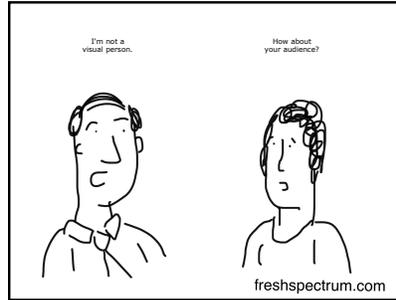


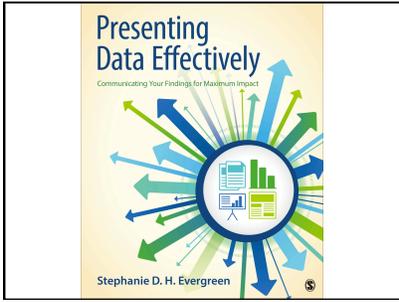
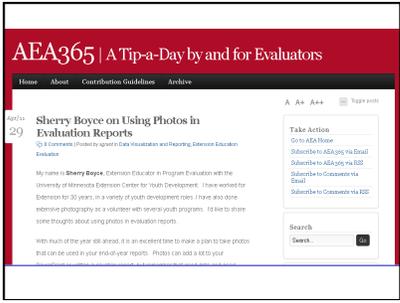
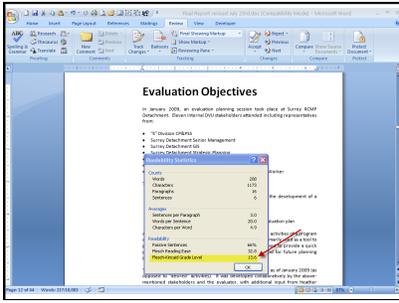
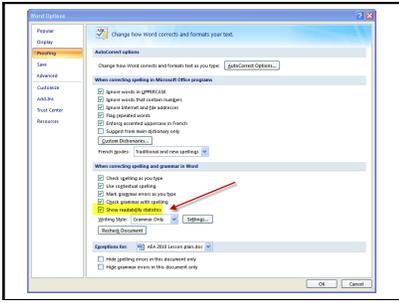
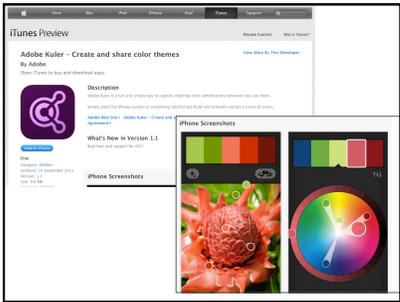
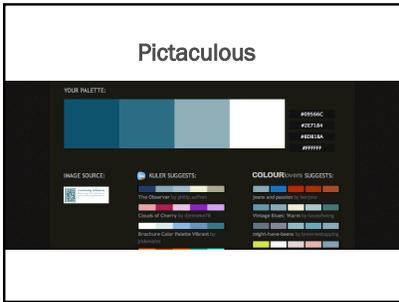
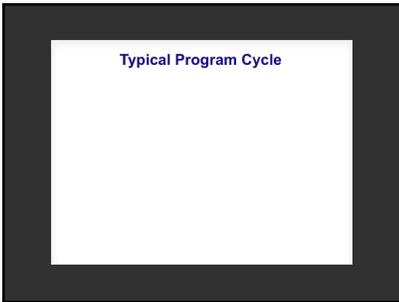
Evaluation Poetry

*We tried to increase school nutrition,
But our goals didn't come to fruition,
Because candy machines,
Are more favored by teens,
We'll address this the next edition.*



Dance



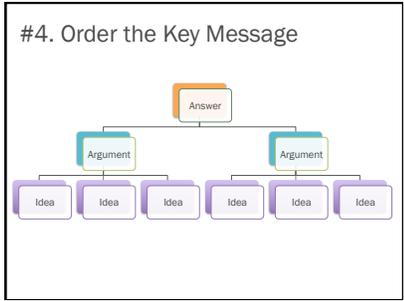


#1. Target Your Audience

#2. Develop a Communications Plan

Stakeholder	Method	Timing	Budget	Priority
Program Staff	Results-briefings	Interim and end	\$	High
Program Participants	Women's meeting	Interim and end	\$\$	High
Community	Community meeting	End	\$\$	High
Donor Agencies	Two-page summary Presentation	End	\$	High
Policy makers	One-page briefing note	End	\$	Medium
Donors	Article in donor newsletter	Beginning and end	\$	Medium
General Public	Press release	End	\$	Low

#3. Layer the information



Learning Objectives

- State the role of communicating results effectively in good evaluation practice.
- State 4 principles for effectively communicating your results.
- List three alternatives instead of, or in addition to, writing a final evaluation report.
- Describe three new tips or practical resources for communicating your results.



25 Tips for Better Conference Presentations

Kylie Hutchinson
Community Solutions
Planning & Evaluation

