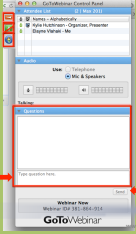


An Executive Summary is Not Enough Alternative Reporting for Evaluators

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.

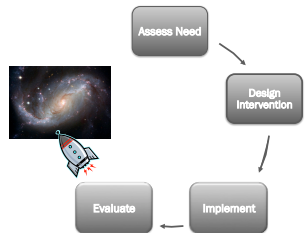
List three alternatives instead of, or in addition to, writing a final evaluation report.

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

Role in Evaluation

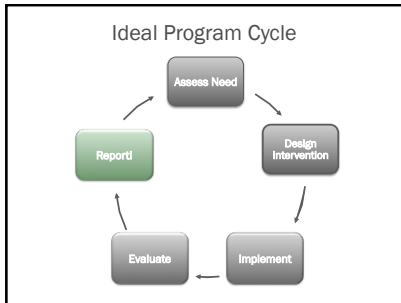
Brainstorm #1 - Why is reporting important for evaluators?

Typical Program Cycle

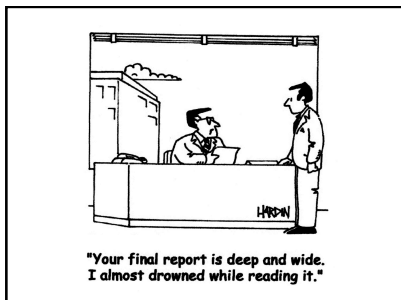


```

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



Why?



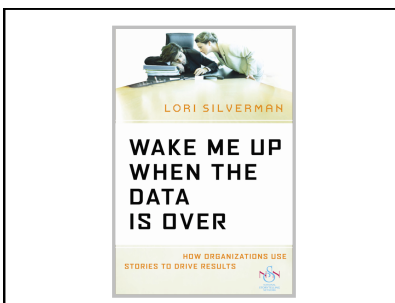
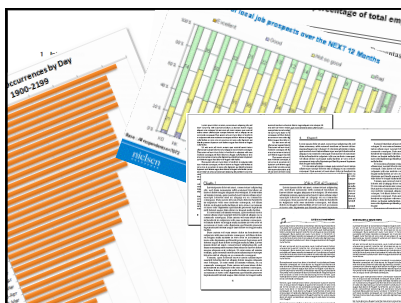
Poll Question

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

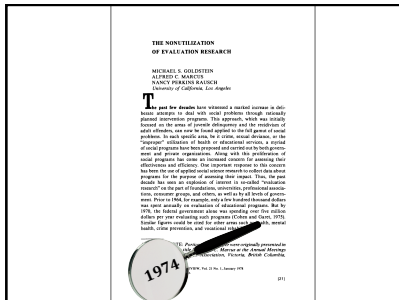


“...there are significant doubts regarding the ability of charitable organizations to discharge their basic responsibilities.”

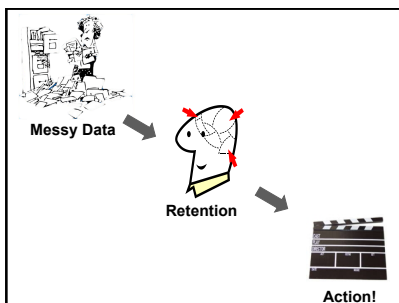
Public Confidence in US Charities (2006)

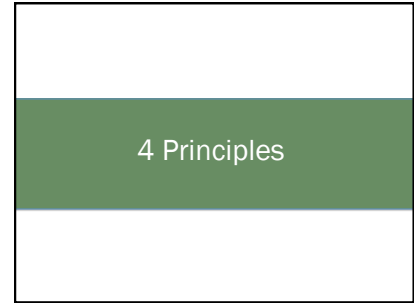
“Charitable organizations...need to do a better job of showing that they actually achieve their missions and produce measureable results.”

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 life looks like each day.
- Why are they here?**
What do they think they are going to get out of this 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 in it 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?

© Quartz, Jan 2018

#2. Develop a Communications Plan

| Stakeholder | Method | Timing | Budget | Priority |
|--------------------|-------------------------------|----------------------------|--------|----------|
| Program | Large poster in training room | End of study | \$5 | 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 | Presentation | End of study | \$ | High |
| Membership | Article in donor newsletter | Beginning and end of study | \$ | Medium |
| Community-at-large | Press release | Beginning and end of study | \$ | Medium |
| | Community forum | End of study | \$\$\$ | |

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 into 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

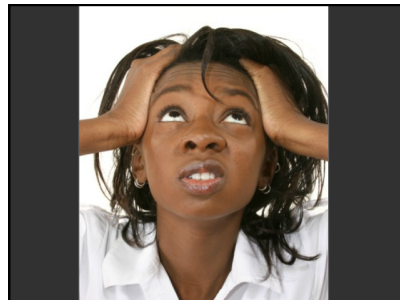
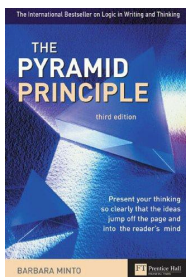
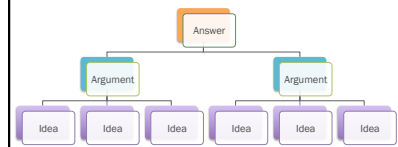


I just put our long boring report up on a buried web page in a format that requires it to be downloaded. Yet for some reason, nobody is reading it.



freshspectrum.com

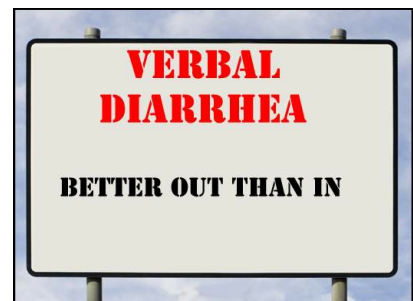
#4. Order the Key Message



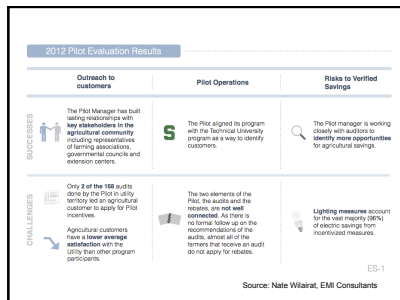
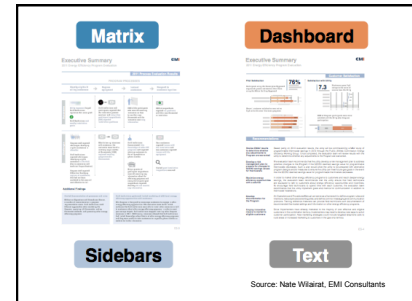
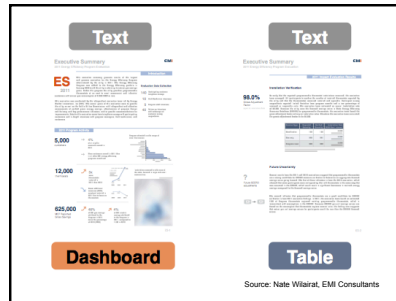
Common Report Errors

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

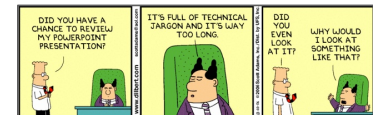
1. Executive Summary too long
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4. Reporting too much data
5. Waiting for the perfect data
6. Too much narrative
7. Ignoring formatting and design



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



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
8. Others?



You don't understand my lingo?

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



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
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8. Others?

<http://www.jmb.com> Editorial

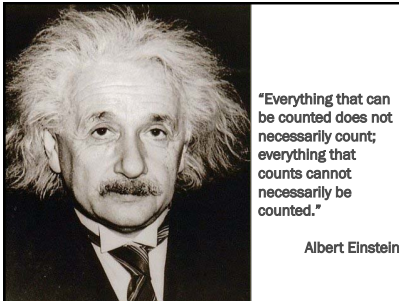
Editorial:
Unlearning Some of our Social Scientist Habits

By Jane Davidson
Davidson Consulting Ltd, Auckland/New Zealand

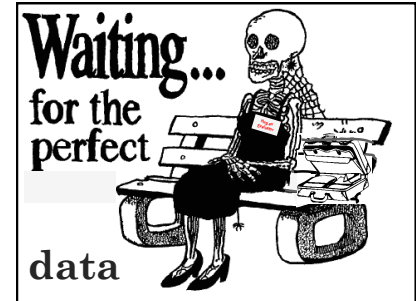
According to the organizational learning literature, some of the most important learning an organization can do is in the form of organizational unlearning—getting rid of erroneous or dysfunctional knowledge, habits, and practices. Simply adding new skills, behaviors, and ways of thinking isn't enough.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

1. Including Models or Theories but not Using Them Evaluatively

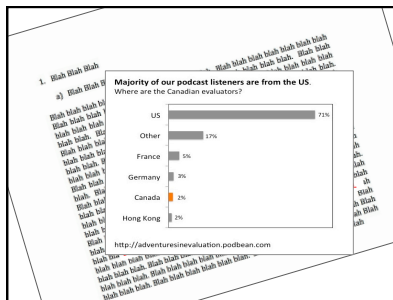
Our social science training teaches us that theory is useful as a good theory. Therefore, a common feature of evaluation reports is some sort of literature review and often the presentation of a theoretical model



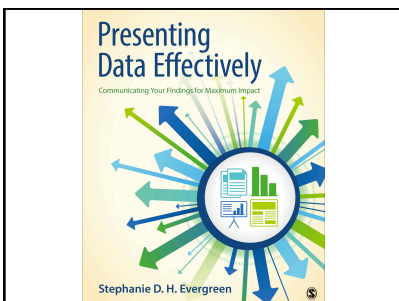
1. Executive Summary too long
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8. Others?



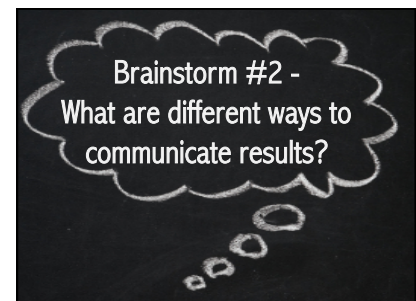
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7. Ignoring formatting and design
8. Others?



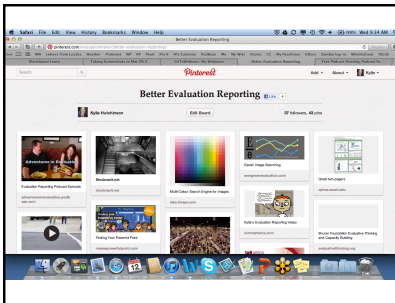
1. Executive Summary too long
2. Too much jargon
3. Key findings hard to...find!
4. Reporting too much data
5. Waiting for the perfect data
6. Too much narrative
7. **Ignoring formatting and design**
8. Others?



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
8. **Others?**



Alternatives to the Final Report



Slides

BETTER
POWER
POINT!!!!



Before

Facilitating Outcome Evaluation Among HIV/AIDS Service Providers in BC

Presentation to the
PHSA HIV/AIDS Program
February 2008



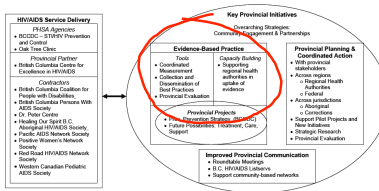
Objectives for Today

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



Background

Collaborating for Action: PHSA HIV/AIDS Strategic Framework (2006)



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



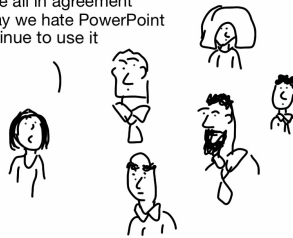
Next Steps

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

Look familiar?



So we are all in agreement
we will say we hate PowerPoint
but continue to use it



freshspectrum.com

More
digestible



After

(same presentation)

An Evaluation Resource

• for HIV/AIDS Service Providers in BC



Provincial Health
Services Authority
Improving Health
Systems

Why evaluate?

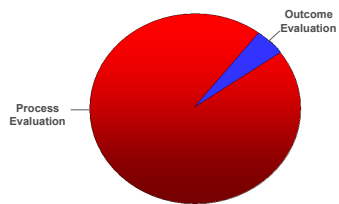


How much **outcome evaluation** is happening?



So What?

Are we making a difference?

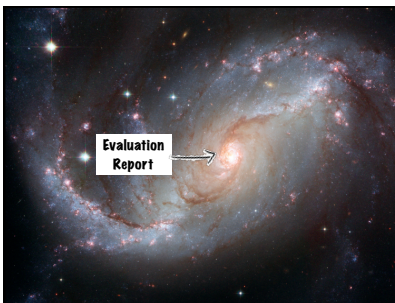


Service providers face significant challenges in doing outcome evaluation.

Different reporting requirements and formats

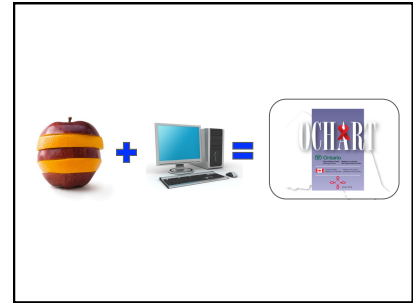


Evaluation Report



Plus other challenges specific to HIV/AIDS







How?

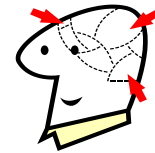
Number of points
that people can
remember

3-5

Number of repetitions
necessary for
integration

5-7

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

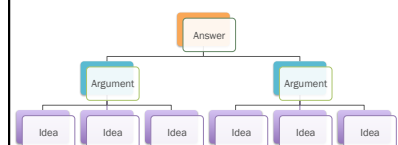


Turn off your computer

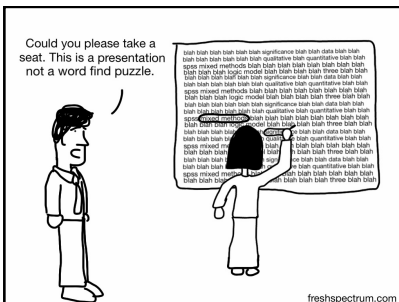
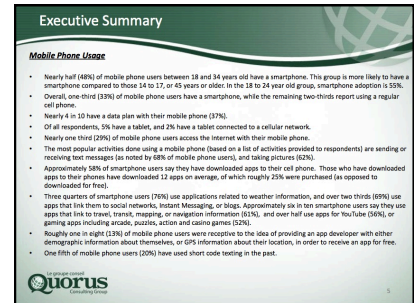
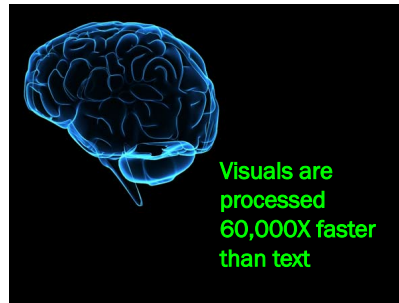
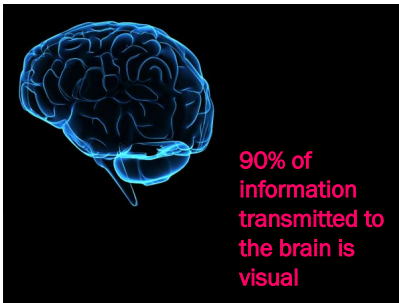


Right-brain thinking

#4. Order the Key Message







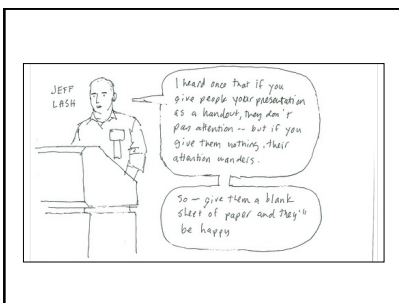
Poll Question

What is the optimum amount of text for a slide?

- 6 bullet points
- 6 words
- 6 pt. font
- As much as I can squeeze in because I put my whole life into this report and dammit someone's going to read it

Maximum words per slide

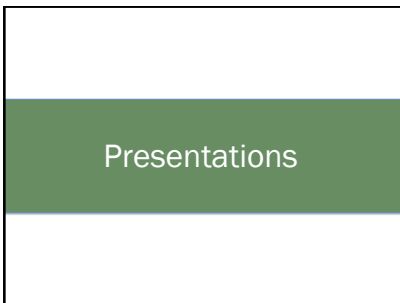
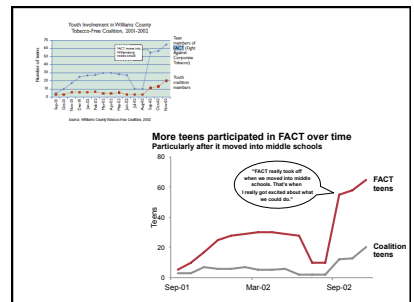
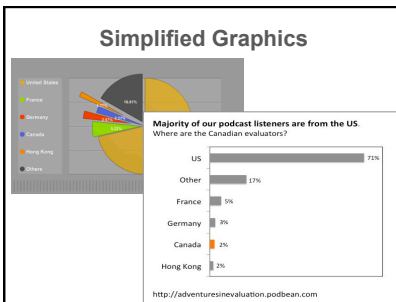
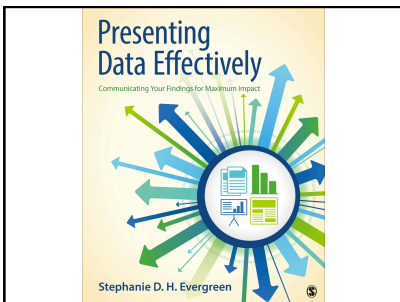
6



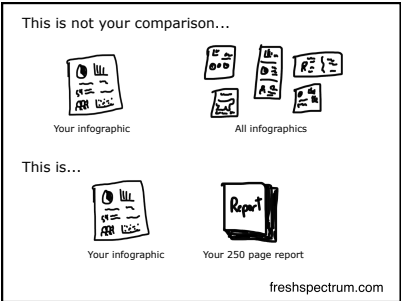
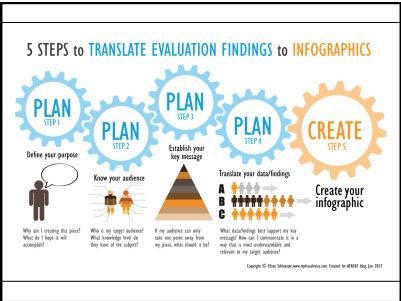
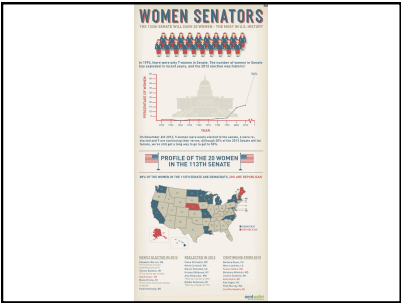
Minimum pixel size

640 x 480

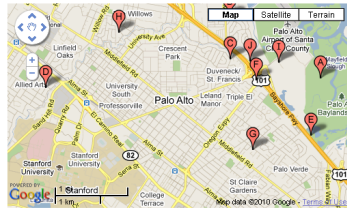




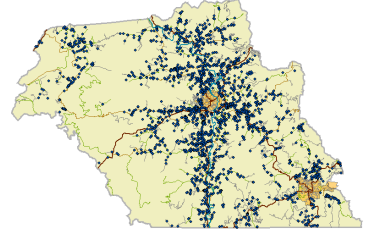
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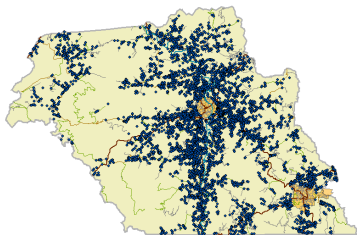
Mapping



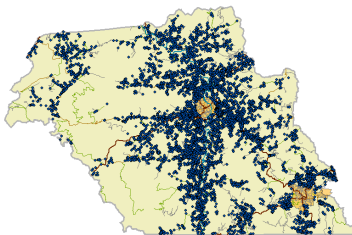
Pre-Intervention



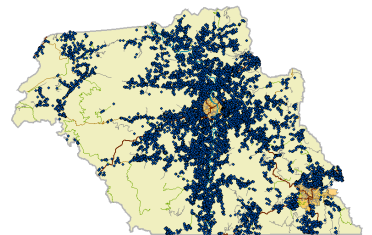
6 months



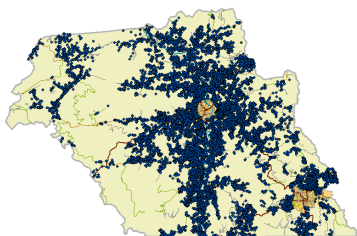
12 months



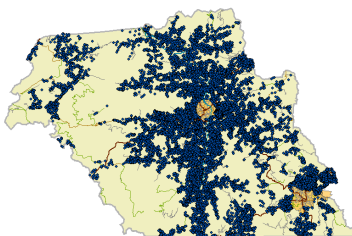
2 years



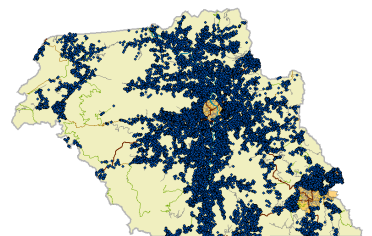
2.5 years

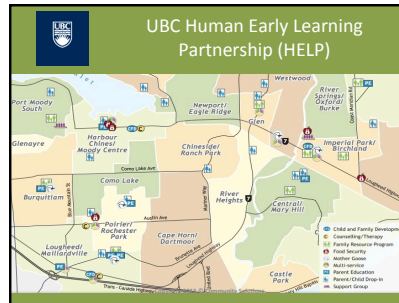
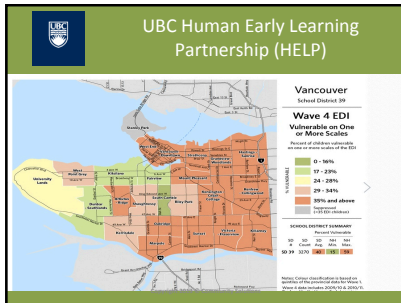


3 years

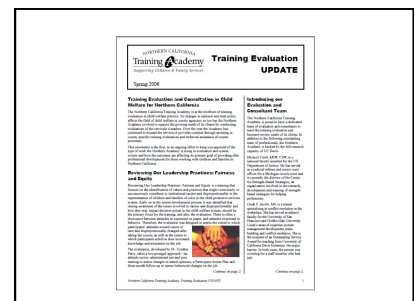
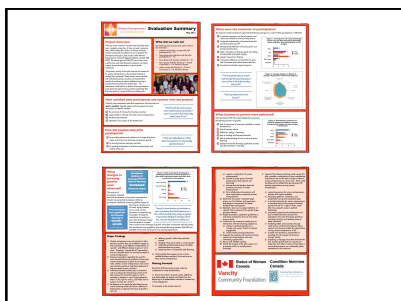
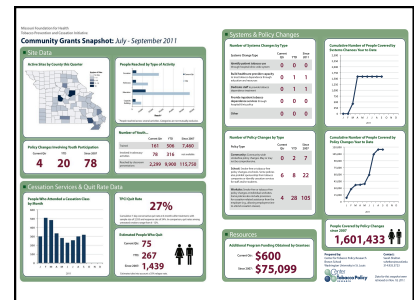
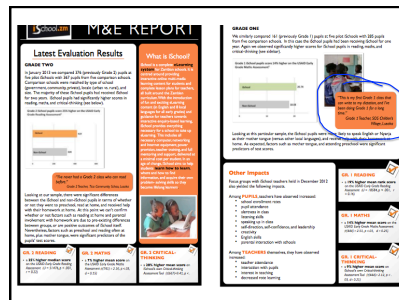
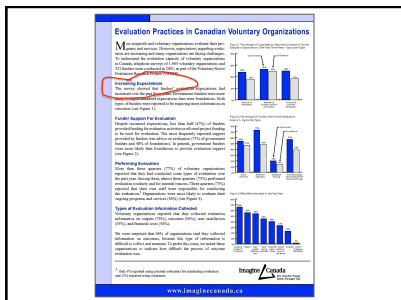


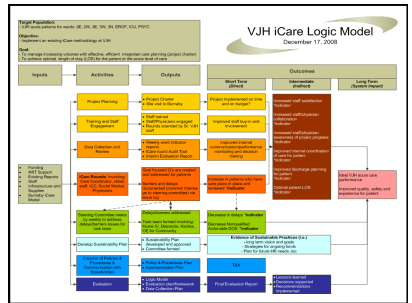
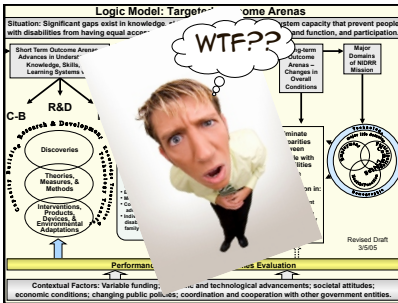
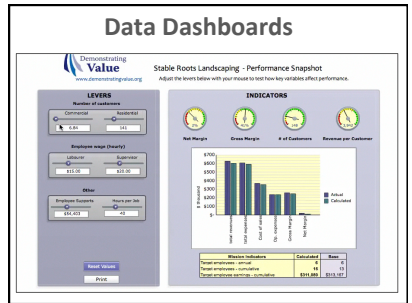
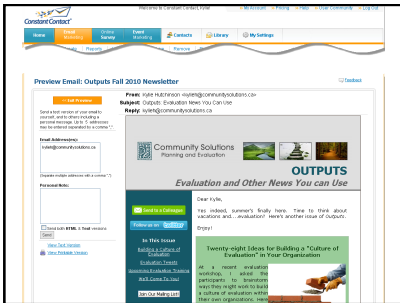
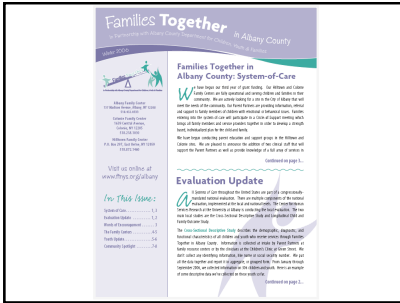
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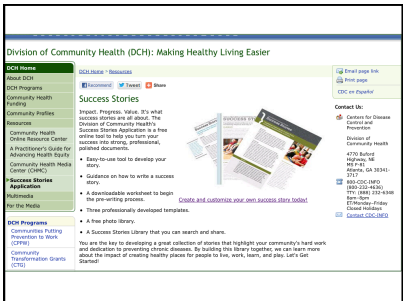
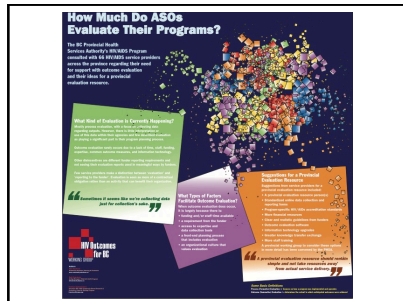
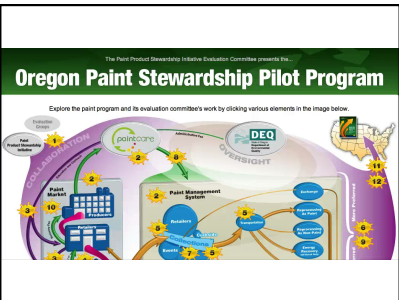
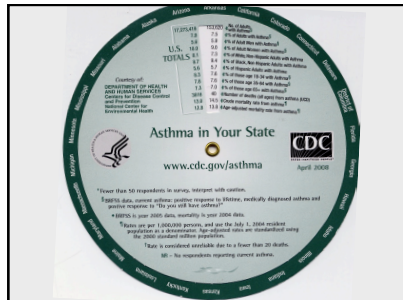
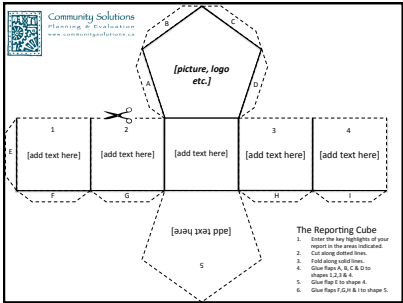
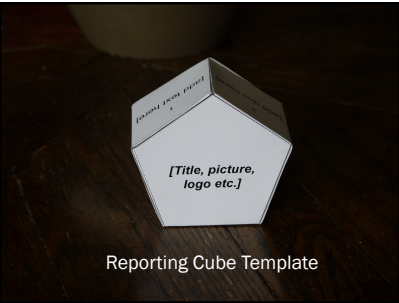


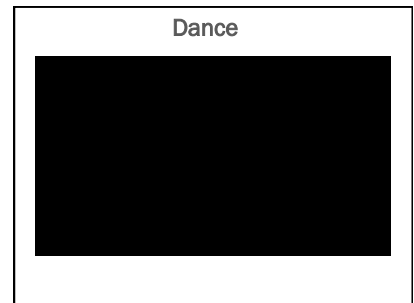
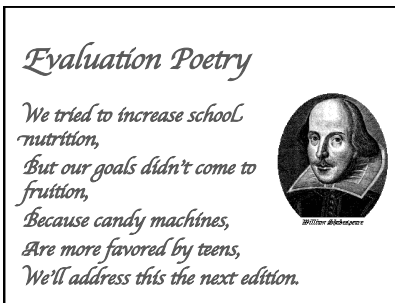
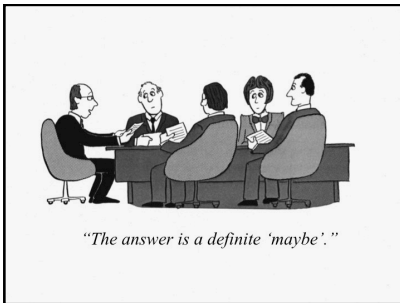
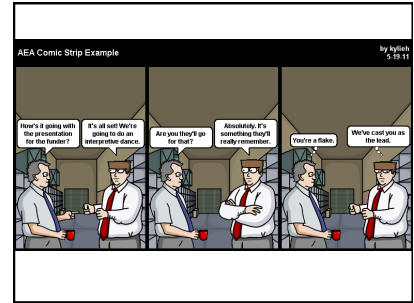
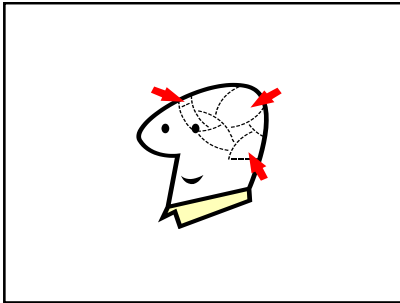


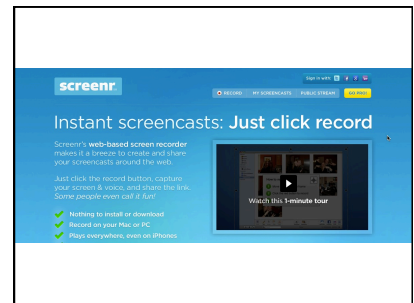
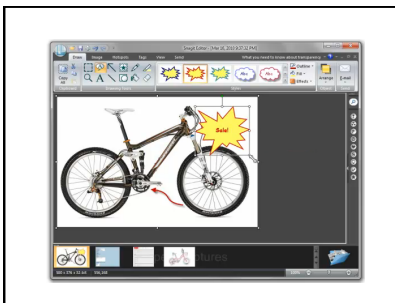
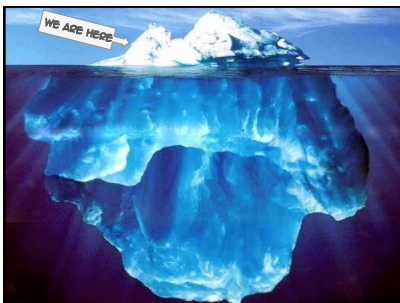
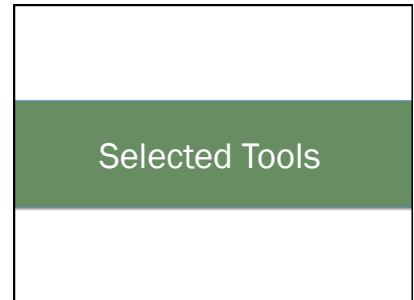
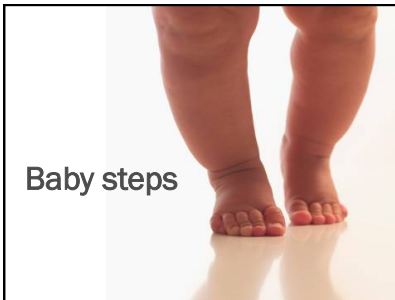
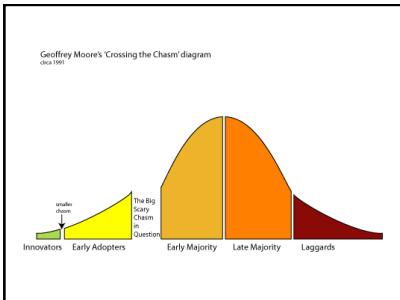
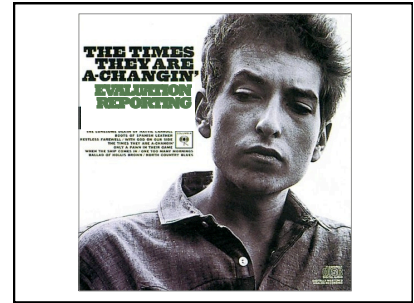
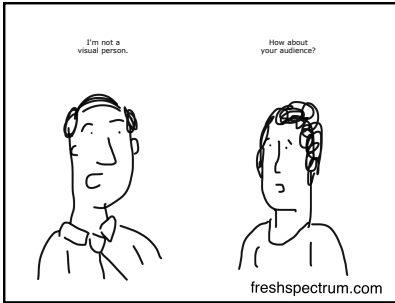
1 - 2 Pagers

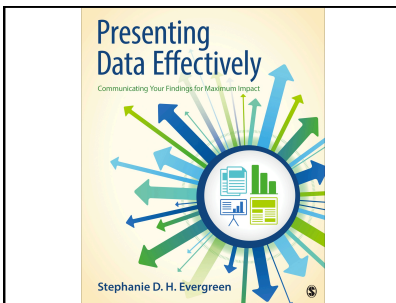
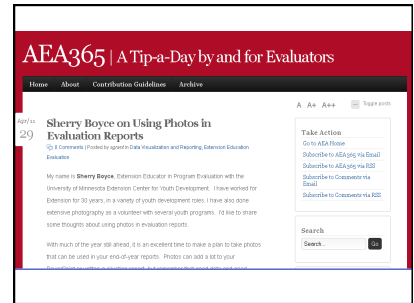
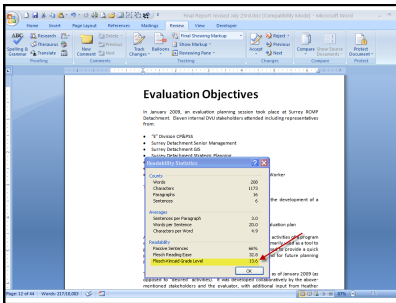
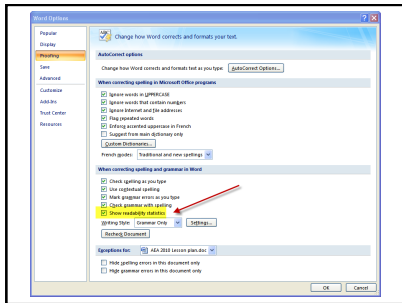
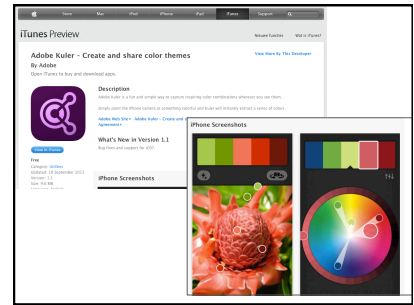
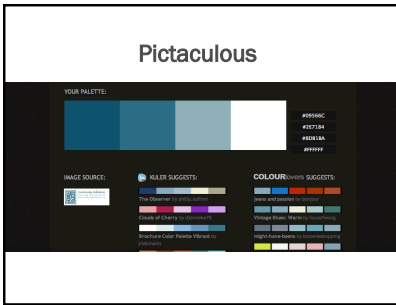
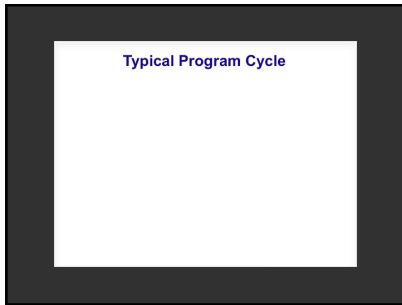












#1. Target Your Audience



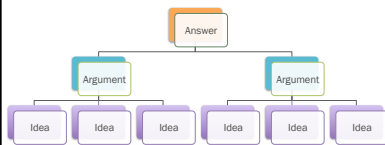
#2. Develop a Communications Plan

| Stakeholder | Method | Timing | Budget | Priority |
|----------------------|-------------------------------|-------------------|--------|----------|
| Program Staff | Results-briefings | Interim and end | \$ | High |
| Program Participants | Women's meeting | Interim and end | \$5 | High |
| Community | Community meeting | End | \$5 | 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



#4. Order the Key Message



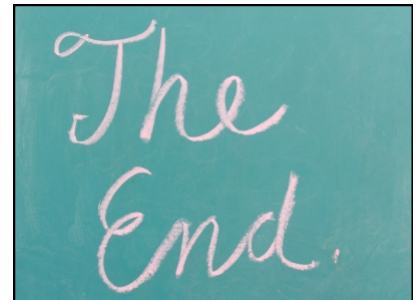
Learning Objectives

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

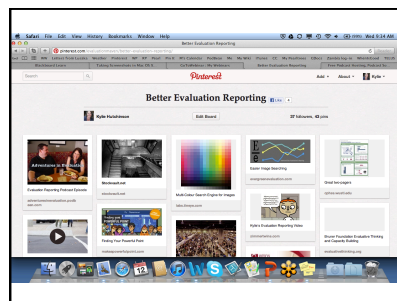
State 4 principles for effectively communicating your results.

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.



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25 Tips for Better Conference Presentations

Kylie Hutchinson
Community Solutions
Planning & Evaluation



