Checklist for Program Evaluation Report Content

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This checklist identifies and describes the elements of an evaluation report. The content is based on evaluation literature, input from experts, the authors’ academic training, and our professional experience.

This checklist should not be treated as a rigid set of requirements. Rather, it should be used as a flexible guide for determining an evaluation report’s content. Each checklist element is a prompt for decision making about what content is appropriate for a particular evaluation context should be made with consideration of the report audience’s information needs and resources available for report development. An evaluation client’s or sponsor’s reporting requirements should take precedence over the checklist’s recommendations. Please note, this checklist is not intended to serve as a guide for planning or conducting an evaluation.

Note: This checklist was designed for project or program evaluation reports. For the sake of readability, we use the term program to mean either projects or programs. The checklist is not intended for product, policy, or personnel evaluation reports.

Preferred Citation

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THIS VERSION OF THE CHECKLIST IS FOR PILOT TESTING:
Please provide your feedback at http://bit.ly/rep-check-pilot

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Checklist for Program Evaluation Report Content

**TITLE PAGE**
The title page provides basic information about the report’s content.
- **Title**: Provide a succinct, informative name for the report. Include the word *evaluation*, program name, and report timing—such as annual, mid-term, or final report.
- **Recipient(s)**: Identify the name, title, organization, and contact information of the individual(s) to whom the report is being submitted.
- **Author(s)**: Identify the name, title, organization, and contact information of the individual(s) who wrote the report. (If the person submitting the report is different from the author, identify that person separately.)
- **Date**: Identify the month and year when the report was completed.
- **Preferred citation**: Provide complete reference information so that other may cite the report. Include the author, year, title, and web address if available.

**ACKNOWLEDGEMENTS**
The acknowledgements section is for identifying and thanking individuals or organizations that assisted or facilitated the evaluation process, whether directly or indirectly. Identify each person by name. If desired, identify their specific contributions.

**TABLE OF CONTENTS**
The table of contents provides an overview of the report’s components and helps readers locate specific items of interest. List at least all first- and second-level headings, including the titles of all documents in the appendices. Identify the page number on which each of these components begins.

**LIST OF TABLES AND FIGURES**
For reports with five or more tables and figures, list their exact titles and page numbers to help readers locate them in the report.

**LIST OF ACRONYMS**
An acronym list serves as a reference for readers about what various acronyms used in the report mean. If five or more acronyms appear in the report, list them all along with the full-length terms they represent. In the body of the report, write out the full-length term the first time it is used, followed by the acronym in parentheses.

**EXECUTIVE SUMMARY**
The executive summary is a synopsis of key information from the main report. The executive summary tends to be the most widely read part of a report and may be the only section some individuals read. Therefore, it should make sense to readers whether or not they read the entire report. Determine the type and amount of information to include based on what is likely to be of most interest to the report’s main audiences.

**INTRODUCTION**
The introduction orients the reader to the type of information included in the report.
- **Overview**: Identify the program that was evaluated and what the report is about.
- **Structure**: Describe how the content is organized.
- **Intended audience**: Identify the groups or individuals for whom the report was developed.
- **Intended uses**: Identify agreed-upon and appropriate uses for the evaluation report.

**PROGRAM DESCRIPTION**
The program description section includes details about the program that was evaluated to help readers understand the context of the evaluation’s implementation and results.
- **Goals and/or objectives**: Identify the specific achievements the program was designed to bring about.
Funder and funding: Identify the entities that sponsored the program and the total program budget. Note any significant in-kind contributions.

Organizations involved: Identify organizations involved in the program and their respective roles.

Intended beneficiaries: Identify the groups or types of individuals the program was designed to serve.

Program design: Describe the program’s activities and products and how they are supposed to bring about desired changes. If the program has a logic model or theory of change, include it here. If the program is based on established theories or literature, identify and describe those as well.

Context: Describe relevant economic, political, environmental, cultural, social, or broader system factors that influenced the conditions targeted by the program or the program’s operations.

History: Identify the program’s stage of maturity, such as whether it a new initiative, has been operating for a long time, or is winding down for closure. Describe how the program has changed over time.

EVALUATION BACKGROUND
The evaluation background section identifies key factors that influenced the evaluation’s planning and implementation. This section helps readers understand the general orientation of the evaluation and the opportunities and constraints that affected decisions about the evaluation.

Purpose and intended use: Identify why the evaluation was conducted and how the results are intended to be used.

Scope: Identify the boundaries of the evaluation in terms of time period, location, and the specific program components that were evaluated.

Stakeholder engagement: Describe how and the extent to which stakeholders were involved in and influenced the evaluation’s planning and implementation—beyond serving as data sources.

Responsiveness to culture and context: Describe the steps taken to ensure the evaluation was culturally responsive and tailored to context.

Budget: Identify the total funding for the evaluation and the percentage of the overall program budget it comprised.

Evaluation team: Briefly describe the composition of the evaluation team and each member’s role. Describe the degree to which the evaluation team was internal and/or external to the program being evaluated. Disclose any real or perceived conflicts of interest—relationships or factors that could affect the credibility of the evaluation—and describe how they were managed.

Prior evaluation: If the program has been evaluated before, summarize key takeaways and implications for the current evaluation.

EVALUATION METHODS
The evaluation methods section describes how the evaluation was implemented and how the evaluation results were obtained. If relevant, explain why particular choices were made. Organize this section so that it is clear which indicators, data sources, and methods were used to address each evaluation question. Presenting these elements in a table may help show clear linkages among them.

Approach: Briefly describe the evaluation theories, frameworks, or lenses that informed the evaluation’s focus, design, or implementation.

Evaluation questions: Identify the questions that framed the evaluation and explain the rationale for their selection.

Criteria: If not obvious from the evaluation questions, identify the defining characteristics or qualities used to judge the program’s performance.

Indicators: Identify what was measured with regard to each evaluation question or criterion.

Data sources: For each indicator, identify the type and source of information collected—such as individuals, documents, or institutional databases.

Data source selection: Describe how data sources were chosen, whether a census or specific sampling techniques.
Sample size and description: If sampling was employed, describe how many individual data sources were selected for inclusion in the sample and the actual number from which data were gathered.

Data collection methods: Describe how the information was gathered from each data source—such as interviews, surveys, focus groups, observations, or document review. If mixed methods were used, describe the extent to which and how qualitative and quantitative approaches were integrated.

Data collection procedures: Include pertinent procedural information, such as how respondents were invited or encouraged to participate in data collection.

Instruments: Identify the tools used to implement each data collection method such as questionnaires and protocols for interviews, document reviews, focus groups, or observations. Include copies of instruments in appendices if possible; if not, provide a brief description of each instrument. If applicable, discuss how data collectors, coders, or raters were trained and calibrated. Report statistical indicators of reliability and validity, if relevant.

Timeline: Identify when each method was implemented and major evaluation tasks completed.

Data management: Briefly describe how collected data were kept secure and the privacy of individuals was protected.

Data analysis: Describe the specific procedures used to organize and transform raw data into findings. Include enough detail so that others could reproduce the analysis, for both qualitative and quantitative data. Indicate whether and how multiple data sources or methods were used to measure the same thing.

Interpretation: Describe how findings were used to answer the evaluation questions and reach conclusions about the program’s quality, value, or importance. Identify who was involved in that process. Include enough detail so that others could reproduce the process and arrive at the same conclusions.

Limitations: Describe factors that may have adversely impacted the accuracy or credibility of the evaluation results. This should include significant limitations that were within or outside of the evaluation team’s control.

EVALUATION RESULTS
The evaluation results section describes what was learned from the evaluation. To make explicit connections between evaluation questions, conclusions, and findings, organize results by evaluation questions or criteria, rather than data collection methods or sources. For example, restate each evaluation question as a heading, then present findings and conclusions subsections for each question.

Findings: Present the evidence used to formulate the conclusions. Describe relevant properties of the collected data, such as response rates and respondent characteristics, and other pertinent information about the accuracy and representativeness of the data.

Conclusions: Conclusions should be answers to the evaluation questions. Start each conclusion subsection with a sentence that directly answers the evaluation question. To enhance transparency, remind the reader of the interpretation procedures used to reach conclusions.

RECOMMENDATIONS
The recommendations section includes suggestions for specific actions that are based on the evaluation results and align with intended evaluation uses. Explain the process used to develop the recommendations. If there are several, group them in categories, such as by evaluation question, program component, or timing. Provide supporting information to facilitate action planning such as priority, timing, and potential costs and benefits. Refer to the specific evaluation results that support each recommendation. While recommendations typically focus on the evaluated program, some may focus on future evaluations of the program—if so, include a rationale for them.
REFERENCES
The references section provides information about literature cited in the report, enabling readers to locate sources if desired. Use a consistent reference style. Provide website addresses for publicly accessible documents.

APPENDIX
An appendix contains supplementary information that is pertinent to the evaluation, but not critical to readers’ understanding of the report. Each document included in the appendix should be referenced in the body of the report. The following types of documents may be appropriate for some evaluation reports:

- **Data collection materials**: Include data collection instruments and protocols, qualitative coding guides, and blank consent forms.
- **List of reviewed documents or artifacts**: List all reviewed artifacts, databases, documents, or other materials, if not already mentioned in the methods section. If possible, format the list using the same style used for references. If publicly available, include website addresses or indicate how others can access the materials.

- **Supplementary data or findings**: If applicable, include additional data tables that may be of interest to some readers, but are not required for understanding the evaluation conclusions. For example, this could include findings disaggregated by region, social group, or time period. Qualitative data are often analyzed and reported according to thematic categories and the frequency with which those themes appeared in the data. However, some readers may find value in viewing raw qualitative data—those may be included if there is no risk of identifying individual respondents based on their comments.

Resources
This checklist is based on our formal evaluation training and experience conducting evaluations, as well as input from an array of evaluators. In addition, the following resources influenced the content of this checklist and we recommend them for individuals who would like additional information about determining content for evaluation reports.

Developed for evaluation consultants working for the International Labour Organization, this checklist identifies report elements and includes guidance for presenting the information.

This checklist by Gary Miron lists the essential components of an evaluation report and includes a rating scale for assessing completed reports.

This brief by the Canadian Health Services Research Foundation recommends that reports include a one-page list of main messages, a three-page executive summary, and a report body of up to 25 pages.

This brief guide by USAID provides practical tips on the structure, content, and style of evaluation reports.

This guide by the Centers for Disease Control and Prevention includes advice for enhancing evaluation use by engaging stakeholders, clarifying an evaluation’s purpose, and understanding a report’s target audience.