# Checklist for Program Evaluation Report Content

Kelly N. Robertson and Lori A. Wingate | October 2017

This checklist identifies and describes the elements of an evaluation report. It is intended to serve as a flexible guide for determining an evaluation report's content. It should not be treated as a rigid set of requirements. An evaluation client's or sponsor's reporting requirements should take precedence over the checklist's recommendations. Decisions about the order of content and level of detail in a report should be made with consideration of the audience's information needs and priorities.

This checklist is strictly focused on the *content of long-form technical evaluation reports*. Although important, alternative reporting methods (e.g., infographics and slide decks) and visual elements (e.g., document design and data visualization) are outside the scope of this checklist.

This checklist is designed to guide the development of *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 to assist in the writing of product, policy, or personnel evaluation reports.

A one-page summary is provided at the end of this checklist.

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## 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, midterm, 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 others may cite the report. Include the author, year, title, and web address, if available (example on page 5).

## ACKNOWLEDGMENTS

The acknowledgements section identifies and thanks individuals who directly or indirectly assisted or facilitated the evaluation process.

- ☐ **Contributors:** Identify each person by name. If desired, identify their specific contributions.

## TABLE OF CONTENTS

The table of contents is a list of the report's main components, which helps readers locate specific items of interest.

- ☐ **Headings:** List all first- and second-level headings, including the titles of all documents in the appendices.
- ☐ **Page numbers:** Identify the page numbers on which each of these components begins.

## LIST OF TABLES AND FIGURES

Include a list of tables and figures when there are five or more in a report.

- ☐ **Titles:** List the exact titles of all tables and figures.
- ☐ **Page numbers:** Identify the page numbers on which each table and figure begins.

## LIST OF ACRONYMS

Include a list of acronyms if five or more appear in the report. This list helps readers locate acronym definitions.

- ☐ **Definitions:** List acronyms alphabetically and identify the terms they represent.

## EXECUTIVE SUMMARY

The executive summary is a synopsis of key information from the main report. This section usually includes important findings, conclusions, and recommendations. The executive summary tends to be the most widely read part of a report. Since it may be the only section some individuals read, it should make sense when read apart from the main report.

- [ ] **Most important content:** Highlight key content from the report, based on the needs of 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 report's content is organized.
- [ ] **Intended audience:** Identify the groups or individuals for whom the report was developed.
- [ ] **Purpose and intended use:** Briefly note why the evaluation was conducted and how the results are intended to be used.

## 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 is designed to bring about.
- [ ] **Funder and funding:** Identify the entities that sponsor the program and the total program budget. Note any significant in-kind contributions.
- [ ] **Organizations involved:** Identify organizations involved in the program and their roles.
- [ ] **Intended beneficiaries:** Identify the groups or types of individuals the program is designed to serve.
- [ ] **Program design:** Describe the program's activities 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 other important factors that influence the conditions in which the program operates.
- [ ] **History:** Identify the program's stage of maturity, such as whether it is 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, such as to meet funder requirements. Describe how the results are intended to be used, such as to inform program improvement.
- [ ] **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 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 constituted.
- [ ] **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. Although many elements are listed below, this section should not overwhelm the report. Decisions about which items to address and the level of detail to include should reflect the audience's interests and information needs. Organize this section so that it is clear which indicators, data sources, and methods were used to address each evaluation question. Presenting all three 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 they are not obvious from the evaluation questions, identify the defining characteristics or qualities used to judge the program's performance.
- ☐ **Indicators:** Identify what was measured for 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:** For each data source, describe how individual cases were chosen—such as through 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 through 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 or calibrated. Report statistical indicators of reliability and validity, if relevant.
- ☐ **Timeline:** Identify when each method was implemented and when major evaluation tasks were 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 similar conclusions.
- ☐ **Limitations:** Describe factors that may have adversely affected the accuracy or credibility of the evaluation results. This should include significant limitations that were within or outside of the evaluation team's control. Include alterative explanation of results, if warranted.

## EVALUATION RESULTS

The evaluation results section describes what was learned from the evaluation. While only two items are listed in this checklist, the results section will likely be the longest part of the report, because it includes the most important and substantive information. Organize results by evaluation questions or criteria, rather than data collection methods or sources, to make explicit connections between evaluation questions, conclusions, and findings. For example, *restate each evaluation question* as a heading, and then present findings and conclusions in subsections of each question.

- ☐ **Findings:** Present the analyzed data and other evidence used to formulate the conclusions. Provide relevant information about the representativeness of the data, such as response rates or data source characteristics.
- ☐ **Conclusions:** Conclusions are answers to the evaluation questions. Start each conclusion subsection with a statement that directly answers the evaluation question. To enhance transparency, remind the reader of the relevant findings and interpretation procedures used to reach conclusions.

## RECOMMENDATIONS

The recommendations section includes suggestions for actions that align with intended evaluation uses. If there are several, group them in categories, such as evaluation question, program component, or timing.

- ☐ **Development process:** Explain how the recommendations were generated.
- ☐ **Recommendations for the program:** Identify suggested actions for stakeholders to consider. Refer to the specific evaluation results to support each recommendation. Provide supporting information—such as priorities, timing, and potential costs and benefits—to facilitate action planning.
- ☐ **Recommendations for future evaluations:** List recommendations for future evaluations of the program, if any. Provide a rationale for each suggestion. This section should be clearly labeled and distinct from evidence-based recommendations about the program.
- ☐ **Ideas for consideration:** Under certain circumstances, it may be appropriate to include suggestions based on the evaluator's experience, rather than direct evidence. This section should be clearly labeled and distinct from evidence-based recommendations about the program.

## REFERENCES

The references section provides information about literature cited in the report, enabling readers to locate sources if desired.

- ☐ **Sources:** Use a consistent reference style. Provide website addresses for publicly accessible documents.

## APPENDICES

Supplementary information that is pertinent to the evaluation, but not critical to readers' understanding of the report, may be included as appendices. Each document included as an appendix should be referenced in the body of the report. The following types of documents may be appropriate for appending to 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 they were not already mentioned in the methods section. If possible, format the list using the same style used for references. If the information is 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. Examples 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.

**Checklist 5: Preparing the Evaluation Report** http://bit.ly/ilorep
Developed for evaluation consultants working for the International Labour Organization, this checklist identifies report elements and includes guidance for presenting the information.

**Evaluation Report Checklist** http://bit.ly/er-miron
This checklist by Gary Miron lists the essential components of an evaluation report and includes a rating scale for assessing completed reports.

**Reader-Friendly Writing – 1:3:25** http://bit.ly/chsrfrep
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.

**Constructing an Evaluation Report** http://bit.ly/rep-tips
This brief guide by the U.S. Agency for International Development provides practical tips on the structure, content, and style of evaluation reports.

**Evaluation Reporting: A Guide to Help Ensure Use of Evaluation Findings** http://bit.ly/cdcrg
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.

## Preferred Citation

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# SUMMARY: Checklist for Program Evaluation Report Content

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## TITLE PAGE

- ☐ Title
- ☐ Recipient(s)
- ☐ Author(s)
- ☐ Date
- ☐ Preferred citation

## ACKNOWLEDGMENTS

- ☐ Contributors

## TABLE OF CONTENTS

- ☐ Headings
- ☐ Page numbers

## LIST OF TABLES AND FIGURES

Include if five or more are in the report.

- ☐ Titles
- ☐ Page numbers

## LIST OF ACRONYMS

Include if five or more are in the report.

- ☐ Definitions

## EXECUTIVE SUMMARY

- ☐ Most important content (key findings, conclusions, and recommendations)

## INTRODUCTION

- ☐ Overview
- ☐ Structure
- ☐ Intended audience
- ☐ Purpose and intended use

## PROGRAM DESCRIPTION

- ☐ Goals and/or objectives
- ☐ Funder and funding
- ☐ Organizations involved
- ☐ Intended beneficiaries
- ☐ Program design
- ☐ Context
- ☐ History

## EVALUATION BACKGROUND

- ☐ Purpose and intended use
- ☐ Scope
- ☐ Stakeholder engagement
- ☐ Responsiveness to culture and context
- ☐ Budget
- ☐ Evaluation team
- ☐ Prior evaluation

## EVALUATION METHODS

Although several items are listed below, this should not be the longest section of the report.

- ☐ Approach
- ☐ Evaluation questions
- ☐ Criteria
- ☐ Indicators
- ☐ Data sources
- ☐ Data source selection (census or sampling)
- ☐ Sample size and description
- ☐ Data collection methods
- ☐ Data collection procedures
- ☐ Instruments
- ☐ Timeline
- ☐ Data management
- ☐ Data analysis
- ☐ Interpretation
- ☐ Limitations

## EVALUATION RESULTS

Although only two items are listed below, this section will likely be the longest, because it includes the most important and substantive information. Organize results by evaluation questions or criteria.

- ☐ Findings
- ☐ Conclusions

## RECOMMENDATIONS

- ☐ Development process
- ☐ Recommendations for the program
- ☐ Recommendations for future evaluations
- ☐ Ideas for consideration

## REFERENCES

- ☐ Sources

## APPENDICES

- ☐ Data collection materials
- ☐ List of reviewed documents or artifacts
- ☐ Supplementary data or findings

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Visit bit.ly/checklist-evalrpts to view the full version of this checklist.

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