CIPP

Effectively **Communicating** Evaluation Findings

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Westat®

About This Tool

This Tool was developed as part of the Center to Improve Project Performance (CIPP) operated by Westat for the U.S. Department of Education, Office of Special Education Programs (OSEP). The authors thank the OSEP and Westat staff, and other individuals who provided input.

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IDEAs that Work
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Overview of the Center to Improve Project Performance

First formed in 2008, CIPP's overall mission is to advance the rigor and objectivity of evaluations conducted by or for OSEP-funded projects so that the results of these evaluations can be used by projects to improve their performance and used by OSEP for future funding decisions, strategic planning, and program performance measurement.

CIPP provides evaluation support, oversight, and technical assistance (TA) to OSEP projects. CIPP staff work with project and OSEP staff to refine project logic models and develop evaluations. CIPP staff have overseen evaluation activities and provided TA, as needed, including selecting samples; developing draft instruments; assisting in new instrument pilots, identifying appropriate data collection and analysis strategies; performing reliability checks; providing accurate descriptions of the methods and valid interpretations of findings; and organizing, reviewing, and editing project evaluation reports. In addition to providing TA to OSEP-funded projects on request, CIPP staff prepare a variety of TA products focused on evaluation issues, and deliver presentations on evaluation through webinars and conferences.

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Getting Started

This Tool is designed to assist grantees of the U.S. Department of Education's Office of Special Education Programs (OSEP), OSEP Project Officers (POs), project evaluators, and other key stakeholders to effectively communicate findings of OSEP projects. The Tool presents guidance and strategies that can be used to identify key audiences and understand their information needs, and to develop evaluation and communication plans that will generate useful information about the project's findings for different audiences. The Tool is organized into six sections:

Section 1
Understanding Evaluation Data and Their Function in Communicating Project Success

Section 2
Planning to Communicate Effectively

Section 3
Communicating About Evaluation Data with Current Project Managers and Staff

Section 4
Communicating with Project Funders and Benefactors

Section 5
Communicating with Current and Potential Project Participants and Potential Replicators

Section 6
Communication Tools and Products

Section 1 outlines the importance of communicating evaluation findings, presents two types of evaluation data, and briefly discusses how to create a plan to link evaluation data to communications. **Section 2** provides ideas about developing a communication plan that identifies audiences, determines their specific needs for evaluation data, and maps out a strategy to address their information needs. **Section 3** explores using internal communications related to evaluation data to monitor and manage project implementation. **Section 4** presents strategies for using evaluation data to communicate with project funders or benefactors about project results. **Section 5** outlines strategies for using data to communicate project details and benefits with current and potential participants, and to provide useful information to potential replicators. Finally, **Section 6** addresses common challenges and ethical considerations associated with communicating evaluation findings, and presents a summary of common communication tools.

The information presented here presumes that grantees are (or will be) working with an internal or external evaluator and that they will have an ongoing relationship with the evaluator throughout the life of the project. Grantees should always work with their PO regarding planning and implementing project evaluation and dissemination activities.

This Tool focuses on strategies for communicating evaluation findings. If you would like other strategies and tools related to evaluating your OSEP project, the following CIPP resources are available on the OSEP IDEAs That Work website:

- Demonstrating Evidence Across the Project Cycle
- Evaluating Special Education Programs Resource Toolkit
- Guidelines for Working with Third-Party Evaluators
- Budgeting for Evaluation: Key Factors to Consider
- Three-Part Webinar Series on Customer Survey Development
- Two-Part Webinar Series on Planning and Conducting Qualitative Interviews
- CIPP Logic Model Outline
- Why Evaluate? infographic

1

Effectively Communicating Evaluation Findings

Understanding Evaluation Data and Their Function in Communicating Project Success

This section introduces basic concepts of communicating evaluation findings, and discusses two types of evaluation data and considerations for communicating creating a communication plan. Read this section to learn about:

- → **Why it's important to communicate about evaluation findings**
- → **Two types of evaluation data that can inform what a project communicates to target audiences**
- → **Creating a plan to link evaluation data to communication strategies**

Why communicate about evaluation findings?

There are many ways to think about communicating evaluation findings. For example, you can consider communications about implementation progress that occur internally among project staff. Or, you can think of how you might communicate with funders to report on a project's successes or challenges. Many times, it's also important to communicate with potential participants, or with a more general audience, to convey information about how a project can benefit stakeholders. In brief, regular and well-structured communications related to evaluation findings can help current and future project implementation by:

- **Ensuring high-quality services are provided.** Regular communication of evaluation findings throughout the project cycle can help to ensure that the services provided are high-quality, relevant, and useful to project participants. This is especially true for internal project communications, which often are used to monitor and manage project implementation.
- **Promoting use of and demand for project services.** Communications about what a project is doing or can do to benefit stakeholders can help generate interest in, and support for, the project. Conversely, the impact or reach of a project can be limited if grantees fail to effectively communicate about project achievements and results.
- **Ensuring accountability for current project investments.** Keeping stakeholders aware of progress helps them to understand whether the project is doing what it set out to do. When evaluation data related to costs are included, it helps stakeholders to know how—and how well—investments in the project are being used.
- **Sharing important information with project stakeholders and the field.** Communications about a project's successes and lessons learned through evaluation can be valuable to others doing similar work, and to a wider audience of individuals interested in learning about the results of project investments.

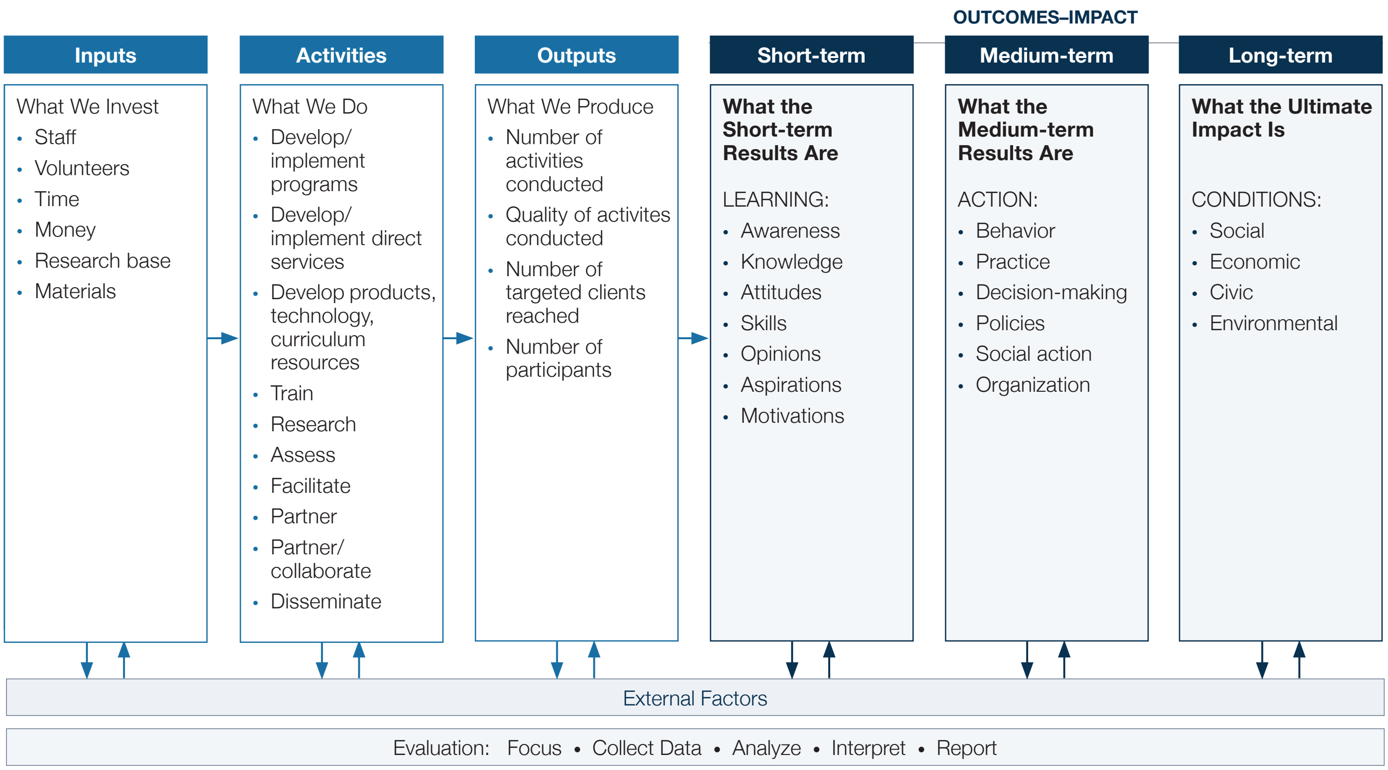
5 Tips for Effectively Communicating Evaluation Data and Information

1. Consider the data and information the audiences most want to know, in addition to the data and information you most want to share.
2. Create evaluation and communication plans early in the project's lifecycle so that each can inform the other.
3. Be succinct.
4. Plan to use multiple modes or techniques to communicate with audiences. Rarely is one technique or tool enough to fully reach your audiences.
5. Investigate cost-effective means of communicating such as social media and web-based platforms.

What are the types of evaluation data you might want to communicate?

Before moving on to creating a communication plan, let's first identify what we mean by evaluation data, or information generated from a project evaluation. Two types of evaluation data are typically used: formative and summative. Formative evaluation data relay what a project is doing or has done, such as the nature and type of services, the numbers of participants served, and the quality of services delivered to participants. Formative data can be collected throughout the project cycle. Summative evaluation data, on the other hand, capture what a project has achieved as a result of its services—its outcomes. Summative data are generally collected upon completion of a specific project phase or time period.[1] The logic model illustrated in Figure 1 presents an overview of the data typically available from a project evaluation. In this figure, formative data include inputs, activities, outputs and short- and medium-term outcomes. Summative data include short-, medium-, and long-term outcomes. Note the categorization of short- and medium-term outcomes as both formative and summative data. Their categorization depends on how those data are used—formative when used for project improvement, summative when focused on achievements.[2]

Figure 1. Data Available from a Project Evaluation



Adapted from: University of Wisconsin-Extension. (2010). Program Action-Logic Model.

Available: http://www.uwex.edu/ces/pdande/evaluation/evallogicmodel.html

1 For a related discussion of how to generate evidence on project implementation and results, see the CIPP TA Product ***Demonstrating Evidence Across the Project Cycle***, available on the OSEP IDEAs That Work website.

2 For more information about evaluating OSEP projects, see the CIPP TA Product ***Evaluating Special Education Programs: Resource Toolkit***, available on the OSEP IDEAs That Work website.

A logic model like the one shown in Figure 1 can be helpful as you think through how to communicate with your audiences. Having a good understanding of the project's inputs, activities, outputs, and expected outcomes will help you to know if your project evaluation will be able to produce the types of information your audiences need. Similarly, knowing the types of data that will be available at different points in the project's evaluation is important for developing a communication plan. For example, short-term data typically give information about a project's outputs and provide participants' immediate feedback and response to project services. In comparison, medium- and long-term data typically convey meaningful information about a project's results and, potentially, impact. A project evaluation likely cannot generate information about long-term outcomes within the project's first year of implementation. Similarly, information about first-year project implementation may not be helpful for audience members seeking to improve project performance in the final year.

A comprehensive evaluation is an integral part of an effective communication strategy. Without high-quality data on the implementation and results of a project, you can't effectively communicate evaluation findings to stakeholders. As you start thinking through your communication plan, discussed in Section 2, in addition to knowing what data might be generated by your evaluation, you need to understand the evaluation questions and the types of findings the evaluation will be able to produce based on the evaluation design and planned analyses. Talk to your evaluator, and check out the CIPP TA Products ***Evaluating Special Education Programs: Resource Toolkit*** and ***Demonstrating Evidence Across the Project Cycle*** for more information about evaluating your project, including how to produce evidence of your project implementation and results.

How can you link evaluation data to communication strategies?

One way to start linking your evaluation data to your communication strategies is to begin by thinking about what information from the evaluation you want to share with your audiences.

Table 1 can help you to identify what evaluation information you want to communicate, choose an approach to conveying the information, decide which format you want to use, determine which communication tool might be best, and pick the frequency of communications. Note that in this table no specific audience has been identified—the focus is on determining what you want to communicate and how you might communicate it. Keep in mind that the information isn't exhaustive; other options for communication approaches, formats, and tools might be more appropriate for your particular project context. The important point is that you think carefully through these ideas and make informed decisions accordingly.

Reference Table 1 for strategies to consider when developing communications related to key evaluation concepts.

Table 1. Strategy Sheet for Developing a Communication Plan Focused on Communicating Specific Evaluation Information

What evaluation ideas do you want to communicate?	What approach might you take to communicate the information?	What format might you use to present the evaluation data?	Which communication tool might you use?[a]	How often will you communicate?
What the project has produced or is producing	☐ Describe the project's service statistics, such as the total number of participants served or the total number of services provided ☐ Describe what the project has created or delivered, such as new resources, services, or products ☐ Disaggregate service statistics to highlight services by client age, location, socioeconomic status, etc. ☐ Describe service saturation rates, or the percentage of a desired population that is being affected by the project ☐ Other:	☐ Tables or graphs that give service statistics & break down service information by characteristics such as age, location, socioeconomic status, etc. ☐ Visual tools such as Geographic Information System (GIS) maps of service areas & service saturation ☐ Sample products or tools produced by the project ☐ Other:	☐ Interim/ final report ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Social media ☐ News media ☐ Project website ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:
Initial reactions to the project	☐ Describe whether participants are satisfied with the services they are receiving ☐ Describe whether services appear to be responding to client needs ☐ Describe reported barriers, challenges, & supports that affect service delivery & use ☐ Describe service provider or staff reactions to service delivery & use ☐ Other:	☐ Client & service provider/staff vignettes that capture client feedback in their own words ☐ Short video clips that encourage participants & service providers to share their stories ☐ Tables or graphs summarizing survey responses ☐ Other:	☐ Interim/final report ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Social media ☐ News media ☐ Project website ☐ Audio/video recording ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:

What evaluation ideas do you want to communicate?	What approach might you take to communicate the information?	What format might you use to present the evaluation data?	Which communication tool might you use?[a]	How often will you communicate?
Whether or not the project is on track for success	☐ Describe whether service benchmarks or targets are being met ☐ Describe adherence to evidence-supported best practices for service delivery	☐ Fidelity of implementation indices that rate project implementation ☐ Comparison of actual project implementation to project guidelines or standards/requirements for implementation	☐ Interim/final report ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Updated or new implementation guidelines ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:
What the project has achieved	☐ Describe a project's results, relative to the need or needs the project was designed to address ☐ Identify & report on each of the project's outcomes ☐ Other:	☐ Tables or figures presenting results of statistical analyses of quantitative outcome data ☐ Qualitative data display tools to present project narratives, or findings from focus groups, interviews, or observations ☐ Visual tools such as GIS maps of results or locations with the best outcomes ☐ Other:	☐ Interim/final report ☐ Technical report ☐ Policy brief ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Social media ☐ News media ☐ Website ☐ Audio/video recording ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:
Project return on investment	☐ Describe the benefits of the project, relative to the costs ☐ Compare project costs to costs of no intervention or other interventions ☐ Describe the timeframe over which benefits will accrue, relative to costs (e.g., will there be a lifetime of benefits generated from a one-time investment?) ☐ Other:	☐ Tables or figures presenting results of cost-benefit or cost-effectiveness analyses that show whether the project is generating a positive return or reasonable results, for the level of investment ☐ Comparison of fidelity of implementation to outcomes ☐ Testimonials ☐ Other:	☐ Interim/final report ☐ Technical report ☐ Policy brief ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Social media ☐ News media ☐ Website ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:

What evaluation ideas do you want to communicate?	What approach might you take to communicate the information?	What format might you use to present the evaluation data?	Which communication tool might you use?[a]	How often will you communicate?
Implications for project sustainability and scale-up	☐ Map scope of existing project services compared to the ongoing or emerging need for project services ☐ Document the extent to which project results have an impact throughout the field ☐ Document support for ongoing or expanded project services ☐ Document the necessary (critical) components of the work that need to be in place in order to sustain or scale-up ☐ Other:	☐ Narrative summaries, tables or figures showing results of Needs Assessment or Gap Analysis outlining the nature & extent of a problem, issue, or concern ☐ Tables or figures presenting results of forecast analyses[b] that indicate the likelihood & extent to which a problem, issue, or concern is likely to grow ☐ Tables or figures presenting results of forecast analyses that estimate the project's results or impacts over time ☐ Other:	☐ Interim/final report ☐ Technical report ☐ Policy brief ☐ Journal article ☐ Infographic ☐ Presentation or webinar ☐ Other:	☐ Weekly ☐ Monthly ☐ Quarterly ☐ Semi-annually ☐ Anually ☐ Other:

a See Table 9 in Section 6 for more information about these different tools.

b For an overview of forecast analysis, see, for example, Chambers, J. C., Mullick, S. K., & Smith, D. D. (1971). How to choose the right forecasting technique. Harvard Business Review. More detailed information on forecasting techniques can be found in Armstrong, J. S. (Ed.). (2001). Principles of forecasting: A handbook for researchers and practitioners. New York: Kluwer Academic Publishers. Available at: https://www.gwern.net/docs/predictions/2001-principlesforecasting.pdf

2

Planning to Communicate Effectively

This section presents information and strategies on planning for effective communications. Read this section to learn about:

- → **Identifying audiences and understanding their needs and uses for data**
- → **Questions to ask to guide your communication planning**
- → **Factors to consider when creating a communication plan**
- → **Tailoring your communications to specific audiences**

Who are the project's audiences, and what are their needs for project evaluation data?

One of the first steps in developing an effective communication plan is to identify project audiences. A project can have multiple audiences for communications related to evaluation findings. Audiences can include individuals who are currently closely connected with the project (e.g., project staff or participants) or who might be connected to the project in the future (e.g., potential participants or project replicators). Other audiences include individuals who support and promote project services (e.g., funders and benefactors); individuals who might use products or technologies produced by the project at a later date; or a more general audience such as professional colleagues, policymakers, the public, and the media.

Generally, audiences can be categorized into two groups: Those who are directly connected to the project and those with indirect connections to the project. **This Tool focuses primarily on the audiences with direct connections to an OSEP project.** We have included some information related to communicating with indirect audiences in some parts of this tool, but we don't explore these audiences in detail. Nonetheless, you can use many of the strategies and tools discussed here to communicate evaluation findings to indirect audiences as well.

It's important to keep in mind that an individual audience member can fit into more than one category. For example, project staff may benefit from a project's results in their community. Or, they may replicate a project in a new location in the future. Project participants may function as important advocates and future benefactors for new projects. Given this, it's good to think comprehensively about the various audience members and the different information needs each audience may have.

Audiences directly connected to the project

Project managers and staff: Individuals implementing and responsible for the project.

Funders and benefactors: Individuals who support (or may support) the project with fiscal or other resources.

Participants, potential participants, and potential replicators: Individuals who may engage with or use project services, or who may want to replicate the project in the future.

Audiences indirectly connected to the project

Public and media: Citizens and constituents—and individuals who report information to them—who are interested in learning about project investments and results. This group may include individuals who may advocate for a project or program, especially after consuming information about the project's design, products, and outcomes.

Professional colleagues: Individuals working within the same field of study or practice, who can benefit from learning about a project's outcomes and lessons learned.

Policymakers: Individuals who write legislation, rules, or regulations that may affect the project, similar projects, or important stakeholders.

Once you've defined your audiences, you need to identify their common and particular needs and uses for data. Often, it's helpful to understand an audience's responsibilities and interests to ensure project communications will meet their needs. That is to say, it's important to understand what a particular audience needs or wants to know about a project, and how they will use that knowledge. For example, a recent study by the National Center for Research in Policy and Practice found that 99 percent of school district leaders reported using research to inform decisions.[3] The box to the left outlines some strategies for getting to know your audience needs.

Strategies for getting to know audience needs

- Talk with different audience members—and with your project evaluator—to determine how the information that will be produced by the evaluation aligns with each audience's needs.
- Review the mission statement/ purpose statement of target audience organizations or agencies.
- Review report requests or templates an audience member desires, such as a report form or list of questions that a project should respond to in its communications.
- Read past reports or articles that an audience member has produced.
- Follow an audience member or his or her agency on social media accounts.
- Track current events, policy issues, or professional organizations to which the audience member may be connected.

What questions can help guide your communications planning?

As you plan to communicate evaluation findings, it's useful to answer three questions for each audience:

1. What does the audience need to know?
2. How will the audience use the information?
3. What is the best way to communicate information (in terms of timing and format)?

Later in this section we present an example of a strategy sheet you can use to plan your communications about evaluation findings with specific audiences.

3 Penuel, W.R., Briggs, D.C., Davidson, K.R., Herlihy, C., Sherer, D. Hill, H.C., Farrell, C.C. & Allen A-R. (2016). Findings from a national study on research use among school and district leaders (Technical Report #1). Boulder, CO: National Center for Research in Policy and Practice.

What factors should you consider when creating a communication plan?

Once you have obtained information about your audiences, their needs, and how they will use the data, you can start to develop a comprehensive communication plan. You can create one overarching plan, or a plan tailored to each audience. Table 2 outlines some key factors to consider in developing a plan that meets audience needs.

Reference Table 2 for questions to consider when developing a communication plan.

Table 2. Factors to Consider When Developing A Communication Plan

Factor	Keep in Mind...
What types of data or information are most convincing to each audience?	Different individuals will find different types of data more convincing, relative to others. For example, some individuals find quantitative data (such as means, frequency distributions, or cost-effectiveness or cost-benefit data) to be most convincing in expressing a project's achievements. Others find qualitative data, such as client stories, videos, or photographic evidence more compelling.
How much data are needed for each audience?	Audience members have different interests and different amounts of time available to consume project information. Some audience members prefer—and have time to read—comprehensive reports containing details about the project's evaluation design, outputs, and outcomes. Others will prefer—or need—concise documents that simply summarize the evaluation findings.
What is the best time to release a project communication?	Different audiences will need information at different times, based upon their expected use for the data. For example, funders will need information on project achievements or results to inform a funding cycle, which may run on an annual or more-than-annual basis. Project directors need information to inform required reporting, which may be annual, semi-annual, monthly, or more frequent in nature. Project managers and staff will also need data on a regular basis to inform daily project operations. Project participants may want data related to fidelity of implementation on a monthly or quarterly basis so that they can make ongoing improvements to how they deliver an intervention in the classroom. As you think through how to use evaluation data to inform communications throughout the project cycle, you may want to consider the stage of implementation[a] and differentiate communication tools and timing accordingly.
What specific communication tool is best for clearly and accurately communicating with different audiences?	There is no "right" communication tool for conveying evaluation information to a specific audience. However, some tools will be better than others. For example, a technical report containing specific information on how cost-effectiveness analyses were conducted may meet a funder's or a professional colleague's needs better than it would the news media. Similarly, you may communicate information on "quick wins" identified through the evaluation more effectively to the general public or to potential participants using a social media account. Additionally, communication tools that lend themselves to brief updates (such as internal memos or social media postings) may be better for reporting information related to implementation progress, outputs, and short-term outcomes. More comprehensive tools such as interim/final reports, technical reports, or journal articles may be better suited to communicating detailed information on the evaluation's methods and results. Table 3 presented later in this section gives some examples of how you might use different tools with different audiences.

Factor	Keep in Mind...
What are the cost considerations associated with collecting data to communicate with different audiences?	It's important to keep in mind that the more comprehensive and ambitious the communication plan, the higher the budgets for both evaluation and communications are likely to be. Moreover, in addition to typical costs associated with an evaluation, costs associated with communicating evaluation findings include production (e.g., graphics, word processing, and compliance with Section 508) and printing or distribution (e.g., web-hosting or delivery costs for hard copy documents).[b]
What is the best way to ensure that your target audience will receive and understand your intended message?	It may be helpful to conduct a "test drive," or pilot, with representatives from different audiences to gauge the effectiveness of your communication tool or approach. In particular, you may want to confirm that each tool or approach 1. communicates information that is *received and understood as intended* by the target audience (i.e., information isn't misinterpreted or doesn't cause confusion); 2. provides the information that each audience needs or wants (without overwhelming the audience); and 3. can be accessed by target audience members in the format desired (e.g., preferred language, hard-copy versus web-based).

a Fixsen, D. L., Naoom, S. F., Blase, K. A., Friedman, R. M., & Wallace, F. (2005). Implementation research: A synthesis of the literature. Retrieved from http://nirn.fpg.unc.edu/sites/nirn.fpg.unc.edu/files/resources/NIRN-MonographFull-01-2005.pdf

b Section 508 is a federal regulation concerning the accessibility of information and communication tools. Section 508 rules help ensure that individuals with disabilities can fully access communications and information, across a variety of modes (including written and electronic information). More information on Section 508 can be found at https://section508.gov/

How can you tailor communications to specific audiences?

Another way to link your evaluation and communication plans is to start by thinking about which audience or audiences you want to target in your communications. This approach might be appropriate if you have limited resources for communication. You can use Table 3 as a strategy sheet or checklist as you think through your audiences' different information needs and uses, and identify communication formats, tools, and timing. Keep in mind that the table isn't exhaustive; for each audience, we have presented ideas and items that others have used to communicate evaluation findings to that audience. Whenever possible, you should query actual audience members first, and then adapt these ideas or add your own.

Use Table 3 if you want ideas for developing a communication plan focused on a particular target audience.

Table 3. Strategy Sheet for Tailoring Communications to Target Audiences

Target audience	What do they typically need or want to know?	How will they likely use the information?	Convincing data presentation formats	"Typical" communication tool	"Typical" frequency
Project managers & staff	☐ What the project has produced ☐ Stakeholder reactions to the project ☐ Whether the project is on track for success ☐ What the project has achieved ☐ Areas needing improvement ☐ Implications for sustainability & scale-up ☐ Other:	☐ Make decisions about whether to continue to implement the project as designed, staffed, & managed ☐ Make selected or slight changes to project implementation, staffing, & oversight ☐ Make comprehensive changes to project implementation, staffing, & oversight ☐ Other:	☐ Tables or graphs of quantitative data ☐ Statistical analyses of quantitative data ☐ Interval progress chart ☐ Qualitative analysis of stakeholder perception data ☐ Client & service provider/staff vignettes ☐ Fidelity of implementation indices ☐ Other:	☐ Posting ☐ Memo ☐ Staff performance report ☐ Training materials ☐ Administrative report ☐ Updated or new implementation guidelines	☐ Weekly ☐ Monthly ☐ Semi-annually ☐ Other:

Funders & benefactors	☐ What the project has produced
	☐ What the project has achieved
	☐ Cost information, including:
	  ☐ Expenditures
	  ☐ Reasons for any cost overages
	  ☐ Return on investment
	  ☐ Cost-benefit; cost-effectiveness
	☐ Challenges for the project
	☐ Implications for sustainability & scale-up
	☐ Future work that might build upon the project
	☐ Other:
		☐ Maintain existing levels of funding or support
		☐ Encourage additional funding or support for the project
		☐ Reduce or eliminate funding or support
		☐ Create new funding opportunities
		☐ Provide guidance & support as needed
		☐ Other:
			☐ Tables or graphs of quantitative data
			☐ Statistical analyses of quantitative data
			☐ Cost-benefit or cost-effectiveness analyses
			☐ Forecast analyses
			☐ Visual tools such as Geographic Information System (GIS) maps
			☐ Sample products or tools produced by the project
			☐ Client & service provider/staff vignettes
			☐ Qualitative analysis of stakeholder perception data
			☐ Timelines
			☐ Other:
				☐ Executive summary/ synopsis
				☐ Interim/final report
				☐ Presentation or webinar
				☐ Technical report
				☐ Infographic
				☐ Policy brief
				☐ Journal article
				☐ Other:
					☐ Monthly
					☐ Semi-annually
					☐ Annually
					☐ Other:

Target audience	What do they typically need or want to know?	How will they likely use the information?	Convincing data presentation formats	"Typical" communication tool	"Typical" frequency
Participants, potential participants, & potential replicators	☐ What the project has produced ☐ Stakeholder reactions to the project ☐ What the project has achieved ☐ Return on investment ☐ Other:	☐ Maintain existing levels of engagement or use ☐ Decide to enroll in or increase use of a projector services ☐ Reduce level of engagement or use ☐ Suggest changes to project implementation ☐ Other:	☐ Tables or graphs of quantitative data ☐ Visual tools such as GIS maps ☐ Sample products or tools produced by the project ☐ Client & service provider/staff vignettes ☐ Qualitative analysis of stakeholder perception data ☐ Other:	☐ Social media posting ☐ News media ☐ Website ☐ Infographic ☐ Presentation or webinar ☐ Journal article ☐ Interim/final report ☐ Technical report ☐ Other:	☐ Weekly ☐ Monthly ☐ Semi-annually ☐ Annually ☐ Other:

Public & media	☐ What the project has produced
	☐ What the project has achieved
	☐ Cost information, including:
	  ☐ Return on investment
	  ☐ Cost-benefit; cost-effectiveness
	☐ Other:
		☐ Advocate for increased support for a project, or demand more project services
		☐ Advocate to maintain existing levels of support & demand
		☐ Advocate to reduce support for a project
		☐ Volunteer to support the project
		☐ Other:
			☐ Tables or graphs of quantitative data
			☐ Visual tools such as GIS maps
			☐ Client & service provider/staff vignettes
			☐ Cost-benefit or cost-effectiveness analyses
			☐ Other:
				☐ News media
				☐ Social media posting
				☐ Website
				☐ Executive summary/ synopsis
				☐ Infographic
				☐ Other:
					☐ Weekly
					☐ Monthly
					☐ Semi-annually
					☐ Annually
					☐ Other:

Target audience	What do they typically need or want to know?	How will they likely use the information?	Convincing data presentation formats	"Typical" communication tool	"Typical" frequency
Professional colleagues	☐ What the project has produced ☐ Initial reactions to the project ☐ Whether or not the project is on track for success ☐ What the project has achieved ☐ Project return on investment ☐ Implications for sustainability & scale-up ☐ Other:	☐ Develop new or complementary projects ☐ Enhance existing projects ☐ Maintain existing level of support for & interest in project or topic ☐ Advocate for or against use of a specific project model or approach ☐ Other:	☐ Tables or graphs of quantitative data ☐ Fidelity of implementation indices ☐ Statistical analyses of project results ☐ Findings from qualitative analysis ☐ Cost-benefit or cost-effectiveness analyses ☐ Needs Assessment or Gap Analysis ☐ Forecast analyses ☐ Other:	☐ Website ☐ Presentation or webinar ☐ Policy brief ☐ Journal article ☐ Interim/final report ☐ Technical report ☐ Infographic ☐ Other:	☐ Weekly ☐ Monthly ☐ Semi-annually ☐ Annually ☐ Other:
Policymakers	☐ What the project has produced ☐ What the project has achieved ☐ Project return on investment ☐ Implications for sustainability & scale-up ☐ Other:	☐ Develop policies or referenda that will increase support for the project in the future ☐ Continue to enforce existing policies or referenda related to a project ☐ Recommend changes that reduce or remove support for a project ☐ Other:	☐ Tables or graphs of quantitative data ☐ Client & service provider/staff vignettes ☐ Visual tools such as GIS maps ☐ Statistical analyses of project results ☐ Findings from qualitative analysis ☐ Cost-benefit or cost-effectiveness analyses ☐ Forecast analyses ☐ Other:	☐ Social media posting ☐ News media ☐ Infographic ☐ Executive summary/ synopsis ☐ Policy brief ☐ Journal article ☐ Interim/final report ☐ Technical report ☐ Other:	☐ Monthly ☐ Semi-annually ☐ Annually ☐ Other:

Once you have a communication plan that identifies elements such as those found in Table 2, we recommend that you work with your evaluator to align the communication and evaluation plans. As discussed in Section 1, the project logic model can help you to know what kind of data your evaluation will produce and determine how it can fit within your overall communication plan.

In addition, in collaboration with your evaluator, ensure the project's evaluation plan:

- **Contains questions and outcomes that are meaningful to the identified audiences.** For example, if you plan to communicate with the public and media, it's important to include evaluation questions related to outcomes of interest to that audience (e.g., whether children with disabilities are better able to succeed in inclusive settings if their general education teacher is also certified in special education). Note that this step may expand the evaluation: including questions that respond to the needs or interests of different audiences may result in an evaluation effort that is larger than that required by the funder. This will likely increase the cost of the evaluation as well.
- **Contains the types of data that are convincing to the identified audiences.** There may be multiple ways to answer an evaluation question. For example, if you want to know which of two interventions is best to use with elementary students with disabilities, you can collect quantitative data on student performance on academic assessments to test whether one intervention results in better academic achievement. Or, you can collect qualitative data to determine whether one intervention has more social validity[4] among school personnel, students and their families than the other, making it more or less likely to be used in practice. Depending on what your audience is most interested in, you may need to collect one type of data over another, or you may need to collect both types. This also may expand the evaluation, if different audiences respond better to different types of data across questions and outcomes.
- **Identifies the staff and resources needed to collect, analyze, and interpret evaluation data.** In order to generate findings that are accurate and presented in sufficient detail to respond to audience information needs, it's important that you carefully think through the staffing and resources required to gather all of the pertinent data. In some cases it may be possible to leverage another organization or agency's existing capacity for communication (e.g., through a university's public relations department or a school district's communications department). This may help in lowering costs associated with communications, thereby leaving more resources for the evaluation.

It can be difficult to keep track of both evaluation and communication plans while simultaneously implementing the project. We recommend completing comprehensive evaluation and communication planning at outset, and creating project calendars and other management tools to help ensure you meet important implementation, evaluation, and communications deadlines. Scheduling communication cycles at key points in time will help facilitate project implementation through the creation of feedback loops; provide information on the perceived value and outcomes of the work; and garner support from key stakeholders for ongoing and future project activities.

4 Social validity refers to the social importance and acceptability of the project or of an intervention, such as the social significance of the intervention goals, the social appropriateness of the activities and procedures, and the social importance of the expected outcomes. See, for example, Foster, S.L., Mash, E.J. (1999). Assessing social validity in clinical treatment research issues and procedures. *Journal of Consulting and Clinical Psychology, 67(3), 308-319.*

Considering trade-offs associated with communicating evaluation findings

You may have noticed that developing a comprehensive communication plan has big implications for a project's evaluation plan. As such, you may need to make trade-offs between meeting all of your audiences' communications needs and having the ability to carry out a rigorous and high-quality evaluation. Some strategies for working through the trade-offs include:

Develop an evaluation plan and budget alongside your communication plan and budget. This way you can calculate the impact of your communication plan on items such as evaluation personnel, data collection costs, and the cost of analyses and reporting.

Consider what it will take to gain access to the data or information your audiences want most. Sometimes, the cost of gaining access to data (e.g., personnel costs to collect the data, financial incentives to encourage data sources to share data with you, political or other barriers to accessing data) are too high or would have too great an impact on other project or evaluation activities. In those cases, you might need to prioritize some audiences' needs over others.

Decide whether the timing works and plan communications accordingly. Some audience members may want or need information on a specific timeframe or deadline which may not be realistic or feasible for the project (such as delivering daily project updates or producing evaluation reports in time for a specific legislative cycle). In some cases, minor changes to the evaluation and communication plans can help you to meet those timelines; in others, it might be necessary to identify other options (such as delivering a presentation prior to a legislative session instead of the final report).

Identify the pros and cons of providing (or not providing) a specific piece of information or data to an audience. You may find that you can organize your communication points into "have to have" versus "nice to have" categories, which can help you prioritize the data you will need to collect and communicate.

3

Effectively Communicating Evaluation Findings

Communicating about Evaluation Data with Current Project Managers and Staff

This section reviews information that can be communicated to assist and promote project implementation. Read this section to learn about:

➔ **Communicating about evaluation data with project managers and staff**

➔ **How the context in which the project operates affects how data are communicated**

➔ **Common tools for communicating with project managers and staff**

How can evaluation data inform project managers and staff?

In creating and managing communications, it will be helpful to think through how you will use—and communicate—the data collected by the evaluation. **As you work with your evaluator to collect and use data to monitor implementation progress and communicate with project staff, we recommend considering four important questions:**

1. **What project elements are working well?**
2. **What project elements need attention and support?**
3. **What project elements can or should continue?**
4. **What project elements can or should be modified, scaled back or eliminated?**

Figure 2, on the next page, presents examples of how you might use evaluation data to inform project staff on project functioning. The figure illustrates one way that you can consider different types of data to determine how different parts of the project are working and then communicate with staff based on the data observed.

Reference Figure 2 if you would like an example of how to use evaluation data to inform communications with project staff.

Figure 2. Example of Using Evaluation Data to Inform Internal Communications

	WHAT DO THE DATA SHOW?	MESSAGE TO STAFF BASED ON THE DATA
Fidelity of Implementation (FOI) Data	**Above FOI thresholds**	It might be necessary/possible to revise FOI thresholds upwards, especially if all implementation sites are showing high FOI. Otherwise, keep supporting implementation.
	At FOI thresholds	
	Below FOI thresholds	
Benchmark Data	Benchmarks/targets are consistently being exceeded	
	Benchmarks/targets are consistently being met	
	Benchmarks/targets are consistently not being met	Major changes are needed, such as providing additional supports to monitor progress & facilitate implementation.
Staffing Data	Staff can implement activities with better quality/timeliness than expected, with their current workload & responsibilities	
	Staff can implement activities with expected quality/timeliness, with their current workload & responsibilities	
	Staff cannot implement activities with expected quality/timeliness with their current workload & responsibilities	Major changes are needed, such as increasing staffing, changing the staffing structure, or adding other supports.
Cost Data	Expenses are lower than expected, given implementation, with resources to spare	
	Expenses are within acceptable limits given implementation progress	No, or minimal, changes needed. Keep monitoring expenses to ensure they remain on target throughout implementation.
	Expenses are higher than expected, given implementation progress	
Data on Barriers & Supports	No major barriers identified & project supports have increased or expanded over time	
	Some barriers identified, but they can be addressed and resolved given the available supports	
	Major barriers exist, & they cannot be easily addressed due to insufficient supports	Major changes are needed, such as additional training or improved participant outreach.

As you can see in the figure, the data collected for different aspects of the project are giving different information about implementation. For example, the fidelity of implementation (FOI) data are showing that implementation in project sites is above the expected FOI thresholds, in which case staff should continue with implementation as is. This might mean that this part of the project is functioning better than expected, or it might mean that it may be necessary to revise the FOI thresholds upward, especially if data show that FOI rates are consistently high. Combining this information with qualitative observation data, or other implementation data, can provide helpful information to staff on what they might do next.

In contrast, the staffing data in Figure 2 show that project staff aren't able to implement all of the activities with the expected quality or timeliness with their current workload and responsibilities. As a result, staff might be working longer hours than originally anticipated in order to implement all activities or they might have scaled-back the delivery of specific services. A message to staff based on this data might be that in order to address this issue it might be necessary to increase staffing, to change the staffing structure, or to provide some other type of support.

How does the project context affect communications with staff?

In pulling together communications to inform staff performance and project functioning, it's important that project staff understand what happens during implementation and are aware of the external factors and circumstances that may affect (a) how well services are provided and (b) whether, and to what degree, project participants can engage in and respond to services. Often, contextual factors that are beyond a project's control influence project or participant success. Common contextual factors include:

- **Internal and external expectations regarding project services and outcomes.** Expectations of the project may or may not be achievable, depending upon, for example, the maturity of the project, the rigor or complexity of its implementation, or the ability to recruit and retain capable staff. A very promising project, for example, may experience significant challenges in its earliest years as it tries to find its footing in a particular environment. It's not uncommon for projects to require a start-up period before they can begin delivering services to the expected level of implementation.
- **Adequacy of financial support for project implementation.** If a project has limited resources available, it cannot provide services to a large, diverse client population. In this case, it may be necessary to focus on a specific group of high-need individuals, or some other narrow population, and to target project resources accordingly.
- **Social and political support for project services.** Within a particular setting, there may be substantial support and demand for project services, or there may be minimal support for—or even considerable opposition to—a particular intervention supported by the project. This will determine whether and to what degree project staff and participants are able to successfully engage in project activities.

Evaluation data can help inform project staff about these and other contextual factors, allowing for adjustments to project activities, approaches, objectives, and communication strategies along the way. The contextual information presented in Table 4 may be important for helping project staff understand critical factors influencing implementation and success, and for making improvements to their individual performance and to project activities.

Reference Table 4 to ensure contextual information is captured to inform the evaluation and internal project communications.

Table 4. Contextual Factors that Might Influence Internal Project Communications

Factor	Type of Data	Keep in Mind...	May Be Helpful When Communicating with Staff about...
Internal and external expectations for what a project can produce or achieve	Project implementation guidelines and data regarding implementation fidelity	Projects can use established implementation guidelines to manage their project or may develop their own guidelines. The guidelines should be accessible to all project staff and be the basis of communicating with staff about performance expectations and project progress. To collect data on implementation fidelity, there need to be clear expectations about what level of implementation is considered “acceptable” and guidelines for what staff should do when implementation falls short of expectations.	**How to implement the project and how to improve their own performance.** Implementation guidelines may help set job responsibilities and performance standards. It may be helpful to reference guidelines when communicating with staff about fidelity of implementation indices or individual staff performance.
	Achievement of project benchmarks or targets	Project benchmarks and targets may be informed by the evidence base and may be part of the implementation guidelines. Benchmarks and targets often are identified in the project’s application for funding and can be an important aspect of reporting back to the funder. Therefore, it’s important to track the achievement of benchmarks on a regular basis—and make mid-course adjustments as necessary to achieve the desired targets.	**Maintaining or improving their own performance.** Project benchmarks and targets may be translated into individual staff expectations. It may be helpful to communicate how each staff member’s accomplishments link to the project’s goals and targets.
Adequacy of support for project implementation	Project staffing data	It’s important to continually be aware of whether staff have the qualifications, training, and experience needed to implement the project and meet project challenges, as there may be a need to provide professional development or training to staff. It’s also important to gauge the extent to which staff have reasonable workloads and performance expectations—adjustments to workloads or assignments may improve the degree to which staff can implement the project as required.	**Managing their workloads or acquiring additional training or professional development to improve performance.** Staffing needs and expectations may inform the project’s hiring process. These needs and expectations also may be helpful when communicating with staff about caseloads and time management or other aspects of staff performance.
	Project expenditures and budget	It’s critical to ensure project resources are expended in expected and approved ways. Periodic reviews of project expenditures and budget may highlight the need to make adjustments to ensure projected future expenditures are aligned with current spending. Failure to track this information may mean the project will run out of resources prior to its end date, or have extra resources that it cannot spend before the end date. In addition, at times it’s possible for project funds to be misspent, either by accident or intentionally. Financial misconduct will seriously jeopardize the project and the project team’s success and future opportunities.	**When and how to “spend” project resources.** It may be helpful to share information about the resources available for the project, as well as allowable and non-allowable areas for expenditures. Doing so may help staff avoid expenses that cannot be reimbursed by the project.

Factor	Type of Data	Keep in Mind…	May Be Helpful When Communicating with Staff about…
Social and political support for project services	External project barriers and supports	There often are factors external to the project that challenge or inhibit its implementation and success. Similarly, there may be factors that support or accelerate a project. These may be internal or external to the project team. It's important to be aware of and collect accurate information on these factors, and to use the information to make project changes, as possible.	**How to improve project functioning and results.** Discussing and acting upon identified barriers and supports is an integral part of a Continuous Quality Improvement cycle. It's important to communicate with staff about project barriers and supports so that they can avoid or mitigate those factors that might limit or hinder the project, while at the same time encourage or work with factors that promote success. Additionally, communications may help staff identify good strategies for addressing barriers or capitalizing on facilitators.

What are common tools to inform project staff about evaluation findings and guide future actions?

There are different ways to communicate evaluation information to project managers and staff. Some common tools include:

- **Memoranda (Memos):** Memos commonly convey written updates, guidance, and information to project staff. Memos might contain critical updates related to evaluation findings; reminders about how the project should be implemented; or information related to changes in requirements, regulations, guidelines, etc., that may affect project implementation and the associated evaluation activities.
- **Postings:** Posting graphs, memos, or other information related to the evaluation—such as implementation fidelity data or data showing progress toward benchmarks (e.g., targeted number of admissions, percent increase in graduation rates)—in common gathering areas can keep staff informed of project implementation progress.
- **Training Materials:** Initially, training materials establish expectations for project staff roles and responsibilities, and outline the quantitative and qualitative nature of desired project implementation tasks along with specific requirements, guidelines, etc. As the project progresses and the evaluation produces data about staff and project performance, you might want to develop training materials to update or retrain staff on service delivery expectations, project implementation guidelines, etc.
- **Staff Performance Reports:** The staff performance report is a report specific to an individual staff person, and connects the staff person's time and resource expenditures back to required tasks, benchmarks, and targets. Based on data obtained through the evaluation, staff performance reports can summarize or present specific actions staff should take to maintain or improve performance.
- **Administrative Reports:** The administrative report presents information about project functioning over a specified time-period. Informed by evaluation data, it provides a project-level summary of implementation, benchmarks and targets, staffing, expenses, barriers, and supports.

When communicating with staff, it's important to identify the time period that the communication references and the timeframe by which you want any actions completed, and any recommendations or directives for staff actions (i.e., what it is you want staff to do with the information you're communicating).

4

Effectively Communicating Evaluation Findings

Communicating with Project Funders and Benefactors

This section presents information that can be helpful when communicating with project funders and benefactors—such as OSEP, other lead agency authorities, state and local education agencies, administrators of institutions of higher education (IHEs), policy analysts, policymakers, foundations, and academics. Read this section to learn about:

- → **What information should be communicated to funders and benefactors (and why)**
- → **Important considerations when communicating with funders and benefactors and potential future funders**

What evaluation information should be communicated to funders and benefactors?

Project funders should be kept informed about a project's implementation and results for a number of reasons. Most importantly, regular communications demonstrate that project staff take seriously the need to be accountable. In addition to providing accountability for funding and resources, regular communication can be helpful to the project itself. For example, setting up regular communications with your PO to discuss evaluation findings can help you to identify potential solutions to implementation challenges, while helping them better understand your project's implementation progress and results.

Communication about evaluation findings with funders and benefactors can also generate support for a project within a funding agency, an important stakeholder organizaton, the project's target populaton, or the general public. This can lead to connections, support, and other opportunities to improve and expand your work. Moreover, many funders and benefactors have deep experience in the project's subject matter or scope of work and can provide technical expertise or logistical support during project implementation.

As with other stakeholder groups, to get started in planning communications with funders and benefactors you should determine the specific information they need to have, when and how often they need to have it, and the best format for providing the information. The questions presented in Table 5 can be helpful as you think through and create the evaluation and communication plans to best meet funder and benefactor needs.

Reference Table 5 for an overview of information you might want to communicate with funders and benefactors.

Table 5. Questions that Funders and Benefactors often Want or Need to Have Answered

Question	Type of Data	Timing of Data
What does the project do? ☐ What needs are being addressed? ☐ What services are being provided to meet the needs? ☐ What evidence or research might be available to support the choice of project activities or the use of project services? ☐ Are the project services or strategies aligned with funder or benefactor priorities?	Formative data on: ☐ Activities ☐ Outputs ☐ Short-term outcomes	This information can be included as part of the application (e.g., in the narrative description of proposed activities) and data can be collected on an ongoing basis (e.g., through collection of formative data on service delivery).
Who does the project serve? ☐ How many and what populations of individuals were (are) served? ☐ Is there a ripple effect from services (e.g., a train the trainer model with the potential to impact large numbers down the line)?	Formative data on: ☐ Activities ☐ Outputs ☐ Short-term outcomes ☐ Social validity data	These data are available after project services start and then on an ongoing basis through formative evaluation activities.
Is the project successful (or can/will it be)? ☐ What are the project's primary outcomes, and did (will) the project achieve them? ☐ What were (are) the successful components of the project? ☐ What were (are) the barriers? ☐ How rigorously were (are) outcomes evaluated?	Formative data on: ☐ Activities ☐ Outputs ☐ Short-term outcomes Fidelity data Summative data on: ☐ Medium-term outcomes ☐ Long-term outcomes	Formative data are available on an ongoing basis; summative data generally start to become available at the project's midway point and beyond.
What does the project cost? ☐ Are funds being expended as per approved budget? ☐ Are funds being expended at an acceptable rate? ☐ Do the benefits outweigh the costs? ☐ Is there a more cost-effective way to achieve the results? ☐ How does the cost compare to similar programs? ☐ Was the overall investment worthwhile?	Expenditure data Cost-benefit data Cost-effectiveness data	The project's proposed or anticipated budget is available in the application or proposal; updated fiscal reports should be available on an ongoing basis. Cost-benefit and cost-effectiveness data can be collected throughout the project period and reported after project completion.
What are the opportunities to enhance or expand the project's success? ☐ What is needed to replicate or scale-up the project in a different setting? ☐ What factors might influence replication or scale-up? ☐ What will replication or scale-up cost? ☐ How are project results being disseminated?	Formative data on: ☐ Activities ☐ Outputs ☐ Short-term outcomes Fidelity data Summative data on: ☐ Short-term outcomes ☐ Medium-term outcomes ☐ Long-term outcomes Expenditure data	Data about the potential for project sustainability and scale-up become available at the project's midway point and beyond.

What are important considerations when communicating with funders and potential future funders?

Understandably, project staff generally want to “put their best foot forward” when communicating evaluation data to funders. It’s important, however, to report complete and accurate evaluation data, including faithful reporting on program successes, strengths, and weaknesses. Here are some tips to consider:

- **Establishing a plan for regular communications early in a project’s lifecycle can help project staff create a constructive working relationship with funders.** This gives funders the opportunity to support the project, “buy into” its purpose and goals, and help ensure it’s as successful as possible. These considerations mean that both communication and evaluation activities start early in a project lifecycle, functioning as important sources of feedback and direction for a project. As you think through how you want to communicate with funders, keep in mind that the timing of data collection and communication cycles are important considerations in managing the work of the project. In particular, complex projects with interrelated elements that must work together to produce the expected outcomes often require more frequent data collection and communication cycles. This is because implementation and communication failures in any one element might hinder the ability of the project to achieve its desired outcomes.
- **It’s difficult to avoid at least some barriers, pitfalls, or challenges during a project’s lifecycle.** Waiting to communicate with funders, especially when there are data that suggest the project is not as successful as it might be—or is struggling with significant barriers—can curtail your ability to partner with your funder to make improvements. Therefore, the goal is not to avoid communicating “negative” information about a project, but rather to use information about the challenges as opportunities to communicate lessons learned, success strategies, and guidance for other projects or peers.
- **There may be constraints or limitations on activities that might be considered advocacy or lobbying.** For example, some communications activities (e.g., scheduling a meeting with a funder to discuss the project’s design and successes and to request new or additional funding) may be considered a form of advocacy or lobbying and may be prohibited or limited by a funder. It may be helpful to determine, as early as possible, whether or not such limits apply to project communications and identify the specific activities that should be avoided.
- **Funders typically invest in projects to help them accomplish specific goals.** Therefore, it can be helpful to use evaluation data to communicate the project’s history of success to potential future funders—explaining how and why a continued or new investment is a good risk for the funder. Communication tools such as a final report or technical report detailing the results of cost-benefit or cost-effectiveness analysis may be particularly persuasive for potential funders, especially when the reported outcomes align well with the funder’s stated interests. It also can be helpful to collect and communicate data on the potential for project growth. Project growth may mean the expansion of the number of services provided or the number of participants served; it also can mean the widening of project scope to serve different locations or types of participants, even without increases in the numbers served. This may be information that funders find helpful as they conduct their own planning.

Reference Table 6 to review contextual information that may be helpful for communicating with funders.

Of course, funders are also influenced by contextual factors such as political, economic, and social conditions; in fact, funding goals may directly reflect these conditions. Therefore, providing funders with contextual information about how these conditions may affect your project may be important. Table 6 presents an overview of contextual information that funders may want to know.

Table 6. Contextual Information to Inform Communications With Funders

Factor	Type of Data	Keep in Mind…	May Be Helpful when Communicating with Funders or Benefactors about…
Alignment of project services with funder goals (or absolute and competitive funding priorities)	Cross-reference of project inputs and services with funder goals.	One of the first areas to demonstrate alignment is in the project application or proposal. In addition, these goals should be kept in mind when identifying outcomes and developing an evaluation plan.	**Project results and impact.** It's good to incorporate specific goals and objectives that are aligned to funder goals. It also may be helpful to frame project results using the same language the funder uses to describe its goals or interests.
Leveraging of resources from multiple funders	Project financial report documenting matching cash or in-kind funds or services.	A project's ability to leverage resources may influence its overall ability to generate interest and support. But resources are not limited to financial support; they also may include partnerships and in-kind donations (e.g., volunteers, materials, and tangible assets).	**Project implementation and results.** It may be helpful, for example, to document and report the total amount and value of resources the project is able to build.
Current or emerging policies or priorities	Political, Economic, Social, and Technological (PEST) analysis data, which provide an overview of different factors in the project context that should be considered.[a]	Projects can collect data about what a project is doing and about its potential for growth or development. These data can include content, quality of service, service range, populations served, and locations.	**Sustainability and scale-up.** Projects that are experiencing success may want to explore strategies for sustainability, including seeking ongoing funding. Alternately, projects may want to "scale up" in various dimensions. It may be helpful to collect data that can help funders visualize or imagine the potential for a project, given the context in which it will be implemented.

a. See, for example, the PEST Market Analysis Tool, available at: http://www.businessballs.com/pestanalysisfreetemplate.htm

Communicating with Current and Potential Project Participants and Potential Replicators

Evaluation serves important functions in the collection and communication of data that inform current project participants on progress and project decisions, and prime future participants or replicators for success. Read this section to learn about:

→ **Why and how to communicate with current participants**
→ **Why and how to communicate with potential future participants**
→ **How to best communicate with project replicators**

What strategies are useful in communicating evaluation information to current project participants?

Regular communication of evaluation findings to current project participants is important for a number of reasons. Communications about project implementation can convey how important participants are to the project; ensure participants have the information they need to successfully participate in the project; and provide reminders to participants of upcoming services, tasks, or events. Communication about evaluation findings can give participants information on next steps and maintaining project successes, and inform them about overall project success and results. When participants have good evaluation data to share, they can become powerful advocates for the project. In particular they may be helpful in recruiting more participants, advocating for community support, or soliciting additional resources.

You can use various strategies for communicating with project participants, and projects often benefit from using more than one strategy simultaneously to keep participants informed. For examples of using dual strategies, you can:

- Post information on the project website or Facebook account and at the same time send an email update to project participants;
- Text participants a quick fact and also post a project-related Tweet about it;
- Send a written version of important information (in the participant's primary language) to the participant's mailing address and also provide an oral report to participants the next time services are delivered; or
- Email the Executive Summary of the project report to participants and also provide a link to the full report on the project website.

When communicating with project participants, remember to:

Ask for information and communicate in the participant's primary language whenever possible. This will provide better evaluation data as well as a more accessible communications product. If the project does not have staff to assist with translation, it may be helpful to include temporary or contracted translation services staff in the project budget.

Ensure both the evaluation and communication plans include opportunities for written and orally transferred information. This is to say, you should not assume that all participants are able to access written information. Both the evaluation and communication plans may benefit by having a backup method for retrieving and communicating information. At a minimum, written communications should be succinct, use plain language, be free of jargon, minimize use of technical terms, and be Section 508 compliant.

Consider what types of communications are appropriate, or allowable. For example, it may not be a good use of resources to spend a lot on developing a sophisticated communications or marketing campaign. Funders also may prohibit "high profile" or "high expense" methods for communications.

What evaluation information is important for potential future participants to know?

In some cases, it might be important to consider how you will communicate with potential future participants. For example, future-oriented communications can help ensure adequate project enrollment or demand. You may want to communicate with potential project participants about the benefits of project participation as a means of ensuring that there is full project enrollment or ongoing demand for project services. To do this you may, for example, use vignettes or feedback and comments from current participants to tell a story of how the project helped them. For some potential participants, a history of success is key—projects that can deliver desired outcomes may generate more support and interest from individuals considering whether to participate in the project.

Some information may help prime future participants for success. That is, communicating guidance on the "keys to success" can help participants get the most out of the project. These "keys" can include information on participant responsibilities; how to engage in project services; and the external factors that may need to be addressed (e.g., family circumstances, logistics of project participation) in order for an individual to fully participate. This information can help a potential participant determine whether this is the right time to engage with the project. Note that these communications also may include information about "red flags," or signals that the time may not be right for a potential participant to work with the project. For example, the time requirements might be more than the participant can manage, the participant might not have pre-requisite skills or qualifications, or the benefits of participation will not be immediately forthcoming.

Current and potential project participants also make decisions about whether to engage in services based on contextual factors. These may include:

- Ease of access and participation;
- Availability of other, similar project services;
- Project's social desirability or social validity; or
- Return on investment or cost to the participant.

These issues should be kept in mind when constructing communication plans, as illustrated in Table 7, on the next page.

Reference Table 7 to review contextual information that may be helpful for communicating with current and potential participants.

Table 7. Contextual Information to Inform Communications with Current and Potential Participants

Contextual Factor	Type of Data	Keep in Mind…	May Be Helpful when Communicating with Current and Potential Participants about…
Ease of access and participation	☐ Costs, if any, to participants ☐ Timelines and requirements for participation ☐ Formative data on project activities, outputs, participant perceptions, and social validity	Current and potential participants generally will need services that "fit" into their daily lives and responsibilities. Participants who work daytime jobs, for example, may not be able to receive project services provided during working hours.	**Project accessibility and suitability.** It's helpful to openly acknowledge what access and participation factors should be considered when participants are enrolling in services.
Availability of other agency or project resources	☐ Formative data on project activities, outputs, and participant perceptions	Participants may benefit from having more than one option for accessing project services, including services that are fee-based or services that provide greater flexibility in scheduling.	**Project support or enrollment.** Participants may benefit from an open discussion of available resources and services, to determine which service or services will best meet their needs.
Social desirability or social validity of project services	☐ Formative data on participant perceptions and social validity	Important and well-designed projects may struggle to gain traction with populations that doubt the legitimacy, cultural relevance, or need for project services.	**Project support or enrollment.** It may be helpful to spend time with a specific target population to garner interest in project services or to develop relationships that can be helpful for soliciting participation.
Return on investment	☐ Formative data on participant perceptions ☐ Summative data on participant outcomes ☐ Cost data	Projects may be well served by approaching current and potential participants as savvy and well-informed consumers. As such, participants may be interested in knowing the nature and extent of personal outcomes that are possible, as a result of project services.	**Potential benefits to the participants.** Participants may require specific information about the nature and extent of benefits they can expect, given a certain level or duration of participation.

What is the best information to communicate to potential replicators?

One marker of a successful project is the demand for replication or scale-up. Evaluation data can answer questions that are particularly important to those deciding whether to replicate or expand a project. Communications with potential replicators should address the level of success of the current project, the potential for future success, and any issues that must be considered moving forward. In addition, most project replicators can benefit immensely from information such as:

- **Knowing how and when to start.** An evaluation can generate information about start-up factors that influenced project implementation and success. These can include logistical information (e.g., when to hire staff); or factors that can affect implementation positively (e.g., the availability of complementary services) or negatively (e.g., a lack of community support).
- **Lessons learned and strategies to improve implementation.** A project's implementation plan contains details on how to operate a project to be consistent with its theory of change (or logic model) and supporting evidence.[5] In practice, however, project implementation rarely proceeds exactly as planned. An evaluation can document how and where the project had to deviate from the original plan and contribute helpful data about lessons learned and strategies to improve implementation. Additionally, if the evaluation includes a fidelity study that is linked to the project outcomes, it can generate information about the way specific project elements influence the observed results.
- **General and specific project barriers and supports.** An evaluation can help determine which barriers and supports might be encountered in a future project, and which are specific to that particular project. And, if the evaluation includes information about potential solutions to the identified challenges, it can be very helpful to potential replicators who might encounter such challenges in the future.
- **Estimated costs.** It can be very challenging to construct an accurate project budget, especially the first time the project is implemented. It's impossible to know ahead of time, for example, if there will be unexpected costs, what those costs might be, or whether it will be necessary to have emergency funds or alternative options available to address unexpected issues that arise. Thus, data on actual project costs can help replicators ensure they are building sufficient resources into the budget for replication in a new environment. Effectively documenting and communicating cost data—especially any costs that are known to vary considerably by location (and those that don't)—can help potential replicators to more accurately estimate the costs of a new project.[6] Another way to help potential replicators is to give them information on return on investment.

As is the case with other audiences, information on several contextual factors may inform the decisions of potential replicators, such as those presented in Table 8, on the next page.

Reference Table 8 to review contextual information that may be helpful for communicating with potential project replicators.

5 For a discussion of how to generate evidence on project implementation and results, including information on how to create theories of change and logic models, see the CIPP TA Product Demonstrating Evidence Across the Project Cycle, available on the OSEP IDEAs That Work website.

6 For more information about estimation of costs and cost-effectiveness of educational or other social programs, see the IES-funded *CostOut-the CBCSE Cost Tool Kit*, available at https://www.cbcsecosttoolkit.

Table 8. Contextual Information to Inform Communications with Project Replicators

Contextual Factor	Type of Data	Keep in Mind…	May Be Helpful when Communicating with Potential Replicators about…
Availability of other agency or project resources	☐ Agency resource and asset reports (including financial resources, space, human capital, and networks)	Projects can draw funding from many different types of investors. Therefore, several projects providing similar yet distinct services may co-exist. This may give potential participants and replicators multiple options or models to use.	**Project support or enrollment.** In particular, it may be helpful to acknowledge how similar projects mesh or complement each other, or how each serves a distinct population or need. It also can be helpful to determine if one project or program is more successful at addressing specific needs.
Social desirability or social validity of programming	☐ Political, Economic, Social, and Technological (PEST) analysis ☐ Social marketing analysis ☐ Social validity data	Good projects fail to get funded all the time. One reason may be that the interest and demand for project services follow trends, which may be informed by political, economic, social, or even technological factors.	**Project support or enrollment.** Specifically, it may be helpful to point out or use language that aligns the project with current academic, experimental, or technological trends.
Influences on costs	☐ Sample operating budgets or expenses ☐ Cost analysis data	A project's costs depend in part on the project's location and unique context. For example, it may be more costly for a project in a rural location to recruit and engage its target population or to hire appropriately trained staff than it would be for a project located in an urban setting. This information can be important to potential replicators who are reviewing a project's actual costs and determining whether they will apply to a project replicated in another location.	**Project budgeting.** It's helpful to provide examples of how a successful project's budget was created and changed over time, as the project encountered and resolved barriers or challenges. In particular, it's helpful to provide a sense of how much or how little a project can spend to achieve a desired outcome.

6

Effectively Communicating Evaluation Findings

Communication Tools and Products

Project staff and evaluators need to be aware of common challenges to clear communication and maintain ethical standards when reporting evaluation findings. Using effective tools can help. Read this section to learn about:

- → **Some challenges for constructing clear and effective communications**
- → **Ethical considerations that should be considered when communicating evaluation findings**
- → **Common tools you can use to communicate evaluation findings**

What are some challenges to clearly and effectively communicating evaluation data?

It's not uncommon for evaluation data to be confusing and, at times, contradictory, creating a challenge for project staff and evaluators to construct clear and effective communications. This challenge is exacerbated when it's not possible to communicate to a particular audience all of the information they need to fully understand the evaluation findings. As explained below, this is commonly true, for example, when communicating project and evaluation limitations, contradictory findings, and "negative" findings or implementation problems.

- **Project and evaluation limitations.** All projects and evaluations have limitations with respect to what can be achieved or evaluated within the time and resources available. Additionally, there may be limits on the types of evaluation designs and research questions that can be answered given the existing project resources or context, which may affect the conclusions that can be drawn from the evaluation findings. These limitations can affect the level of success or the ability to document success. It's important to document these limitations in project and evaluation records and to make limitations available to audiences in written and oral formats. It can be challenging, however, to ensure limitations—especially those associated with an evaluation's design and analysis—are recognized and considered when audiences assess the information they've received.
- **Contradictory findings.** Sometimes the data don't point to (or "triangulate") one particular finding. At times, evaluation data suggest that one or more outcomes are possible, and (particularly in the context of education projects) evaluation data may not be able say with certainty whether the project is responsible for the observed outcomes. Project audiences may need to review a full project report to make sense of contradictory findings. Not all audiences, however, are willing or able to invest in fully understanding why and how a project can have such confusing results. When presenting outcome findings, it can be important to "lead off" communications with a brief description of what is known and what is yet to be known, based on the evaluation.
- **"Negative" findings or implementation problems.** Sometimes a project's evaluation produces "negative" findings; that is, findings that suggest the project wasn't successful or was less successful than expected in some areas. Other times, an evaluation finds instances in which staff (or participants) made mistakes or didn't fully implement the project model. These are challenging circumstances for project staff and evaluators, especially when communicating this information to influential audiences such as funders. At such times, it may be helpful to solicit advice from experienced

communications professionals. Even if this isn't possible, taking the stance that evaluation findings—even "negative" ones—produce valuable information can help ensure that key audiences learn as much as possible from project experience. With that in mind, it might be a good idea to specifically create a plan to communicate any "negative findings" to key stakeholders, along with information about the implications of those findings for future project actions.

What ethical considerations should you keep in mind?

Evaluators cannot promise to deliver positive findings. The role of the evaluator is to objectively gather information about a project's successes and challenges, and to make a full and accurate report to project audiences and stakeholders. It's important to recognize that professional evaluators are bound by ethical guidelines produced by organizations such as the Joint Committee on Standards for Educational Evaluation or the American Evaluation Association, which address and guide how data are collected and reported. It's understandable that project staff will want to communicate the most positive and successful aspects of services. This stated, it's helpful to allow for the possibility of negative findings from the beginning and, when creating a communication plan, to remember that evaluators are charged with documenting and reporting both the successes and challenges that projects experience. For more information about working with an evaluator, see the CIPP Guidelines for Working with Third-Party Evaluators available on the OSEP IDEAs That Work website.

What tools can help you communicate your evaluation findings?

It's important to identify the right tool to communicate your evaluation findings. Use a range of data types and identify the best times and tools for communicating the available data. As discussed throughout this document, when choosing which communication tool to use, you should consider what the audience needs to know, how the audience will use the information, and what is the best way to communicate the information to that audience. Table 9, on the next page, describes common communication tools, along with audiences for which they are often used. A simple Internet search will produce information about each of the tools listed below, including how-to guides and creative ideas for using them effectively.

Reference Table 9 for a description of common communication tools and audiences they might be used with effectively.

Table 9. Common Communication Tools

Format or tool	Description	Commonly Used With…
Executive summary or synopsis	The executive summary (or synopsis) concisely summarizes the project's key services, goals, and accomplishments along with contextual information needed to understand and assess the project's achievements.	Funders and benefactors Public and media Policymakers
Interim or final project report	Interim and final reports contain data for a specific project period, often including a comprehensive accounting of project achievements and results to date. Additionally, the final project report typically includes contextual or explanatory information that helps the reader understand and assess the project's achievements.	Project managers and staff Funders and benefactors Participants/potential participants/ replicators Professional colleagues Policymakers
Technical report	A technical report contains details about a project's evaluation methodology and formal analyses. The technical report is used to present the evaluation in fine detail, including the results from statistical analyses. The technical report may be included as an appendix to the annual or final project.	Funders and benefactors Participants/potential participants/ replicators Professional colleagues Policymakers
Policy brief	Policy briefs typically are used to concisely convey policy-relevant information about a project, including project effectiveness, efficiency, and equity.	Funders and benefactors Professional colleagues Policymakers
Journal article	Journal articles contain information relevant to the larger field of study and may be written for a technical audience or practitioners. Articles typically ground the project's findings in extant theory and explain how the current project is enhancing or growing the evidence base and overall field of study.	Funders and benefactors Participants/potential participants/ replicators Professional colleagues Policymakers
Infographic	An infographic is a concise, visually appealing, and relatively brief document that presents critical information about project goals, services, and achievements.	All audiences
Presentation or webinar	Presentations and webinars are often used to present general summaries of evaluation findings, results of specific sub-studies relevant to a particular audience, or to convey important lessons learned.	Project managers and staff Funders and benefactors Participants/potential participants/ replicators Professional colleagues Policymakers
Implementation guidelines	Implementation guidelines contain requirements and standards for the "who, what, when, where, and how" of project service delivery.	Project managers and staff Participants/potential participants/ replicators Professional colleagues

Format or tool	Description	Commonly Used With…
Social media posting; blog	Social media formats such as Facebook and Twitter allow for relatively short and frequent updates about project services and achievements. Blogs, or web-logs, are online journals that can convey information about project services, how services are received, project barriers and challenges, and project results.	Funders and benefactors Participants/potential participants/ replicators Public and media Professional colleagues Policymakers
News media	Press releases, interviews with news media, and other ways of communicating evaluation findings can reach multiple audiences simultaneously.	Funders and benefactors Participants/potential participants/ replicators Public and media Professional colleagues Policymakers
Audio recording	Audio recordings, such as a radio broadcast or podcast, present information orally.	Participants/potential participants/ replicators Public and media
Video recording	Video recordings, such as YouTube clips, present information about the project in a video format.	Participants/potential participants/ replicators Public and media