

Evaluation Report Layout Checklist

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This checklist is meant to be used as a diagnostic guide to identify elements of evaluation reports that could be enhanced using graphic design best practices and/or the assistance of a graphic design expert. Suggestions are best suited for those using standard Microsoft Word software.

Instructions Rate each aspect of the report using the following rubric, by circling the most appropriate letter. Use Best Practice section as a guide for improvement.

F=Fully Met P=Partly Met N=Not Met

Type	Rating	Best Practice
Text fonts are used for narrative text	F P N	Use serif fonts. Nothing with lots of graphic detail.
Long reading is in 9-11 point size	F P N	Studies have shown that 11 point text is easiest to read at length, but it can depend on the typeface (font).
Body text has stylistic uniformity	F P N	Each text section has unbolded, normal text in sentence case (no all caps), except in short areas of intentional emphasis. This supports undistracted reading.
Line spacing is 11-13 points	F P N	For lines within paragraph, generally choose 1-2 points larger than the size of the body text.
Headers & callouts are emphasized	F P N	Header should be 150-200% of body text size. Sans serif or decorative is okay. Use sentence case. Contrast with body text by using different size, style, and/or color. Too similar looks unintentional.
No more than 3 fonts are used	F P N	A change in font will indicate a change in meaning. Use font changes to guide reader through information according to importance.
Bullets are slightly less thick than text	F P N	If bullets must be used, decrease their size to slightly less (70-80%) than the point size of the font. Otherwise, they are too strong and distracting. If good spacing is used in lieu of bullets, this best practice is Fully Met.

Notes

Nice serif choices include
Garamond, Palatino, Cambria

Nice sans serif choices are
Trebuchet, Verdana, Calibri

Sentence case is when the first letter of the line is capitalized and all others are lowercase, excepting proper nouns.

Body text is that which comprises the narrative of the report.

By contrast, *header text* is that which comprises your headlines and titles. Also known as display text.

- Default bullet size (too big)
- Appropriate bullet size

Arrangement

Alignment is consistent	F	P	N
Columns are 8-12 words in length	F	P	N
Important elements are prominent	F	P	N
Body text is left or full justified	F	P	N
Grouped items logically belong together	F	P	N
Empty area is allocated on each page	F	P	N

Rating

Best Practice

Alignment is a preattentive feature easily picked up by a reader, so be sure elements start in the same place on each page unless misaligned on purpose. Avoid centered elements.

This is 50-80 characters, depending on font. Longer is difficult to track from line to line, shorter creates too many hyphenated words, distracting the reader. See?

Most prominent position is top half of page and/or emphasized by size, color, orientation, etc. Supportive information is toned down.

Ragged right edge is more informal, but easier to read for average readers. Full justification is formal, easier for fluent readers, but creates design issues with "white rivers" or large gaps of white space between words.

Grouped items are interpreted as one chunk. Place logical items together. Add space between groups. Minimize space between header and body text.

Leave plenty of space between paragraphs, around page margins, and between text and graphics. It gives eyes a rest.

Notes

Imagine each page divided into rows and columns. Draw imaginary lines to check that elements are aligned at the start of each row and top of each column.

Asymmetry is an easy way to create interest. Try placing a cool picture off to one side of the page.

Wide margins are a quick way to create empty area and manage line length.

Graphics

Pictures/graphic elements are present	F	P	N
Graphics are near associated text	F	P	N
Graphics are simple	F	P	N
Size corresponds to changes in meaning	F	P	N

Rating

Best Practice

Multimode learning increases chance at storage of info in long-term memory because it eases cognitive load of body text. Choose pictures or graphics related to your topic. Graphics include, but shouldn't be limited to, tables and charts. If there are no graphics, this section is all Not Met.

If readers must flip around to interpret between text and graphic, comprehension will be impaired.

Less visual noise leads to better assimilation. Eliminate gradation, textures, or graphics as backgrounds. Segment complex graphics into smaller chunks.

Use, for example, larger pictures on chapter start pages. In graphing, for example, be sure height of columns proportionately represents data.

Notes

Pictures and graphics related to your content will make your content more memorable.

Choose pictures from quality sources, like paid websites. Watermarks or fuzzy images are signs of an amateur.

Use a cover page at the beginning of a report. This is a good place for a very large graphic.

Graphics direct toward text	F	P	N	Use the power of an image to direct the reader's gaze from the image to the associated text. Eyes in a photo, for example, should look inward at text.
Visual theme is evident	F	P	N	Pick a visual theme that can be used in different forms throughout report to give strong emotional connection.
Some elements are repeated	F	P	N	Repetition of some graphic elements adds unity to the piece, makes work more memorable. Careful not to overdo it – too many elements can add clutter or complication.

Color

Rating

Best Practice

Narrative text is dark grey or black	F	P	N	Black has highest comprehension levels, with low intensity colors taking a distant second place.
Background has white/subdued color	F	P	N	Reversed-out text (e.g., white text on black background) impairs information retention.
One or two emphasis colors are used	F	P	N	Subdued colors that still contrast with background should be used. When used, it should be to actually emphasize important information, like data in a graph. If more than one is selected, consider choosing along a color gradation so that order of importance is implicit.
Color changes mark meaning changes	F	P	N	Color changes signal a change in hierarchy of information. Be intentional with color changes so that a viewer doesn't get confused.
Color reprints legibly in black and white	F	P	N	Color looks different on a computer screen than on paper. Print on a black-and-white printer and then make a copy of that printout to check legibility.

Notes

Keep in mind various culture-laden *color connotations*. For example, pink is highly associated with feminine qualities in the USA. Make sure your color choices are appropriate for your audience.

Note that *people with colorblindness* have difficulty with red-green and yellow-blue combinations.

A safe bet is to *use your client's colors*.

Time to add up your points:

F = 1 point

P = ½ point

N = 0 points

Well-formatted reports score within 23-25 points. At this level, report readers are better able to read and retain content. For more easily-accessible resources, check out:

Robin Williams' book *The Non-Designer's Design Book*

Design Elements by Timothy Samara, for those ready for more advanced material

My book, website, and blog at www.stephanieevergreen.com