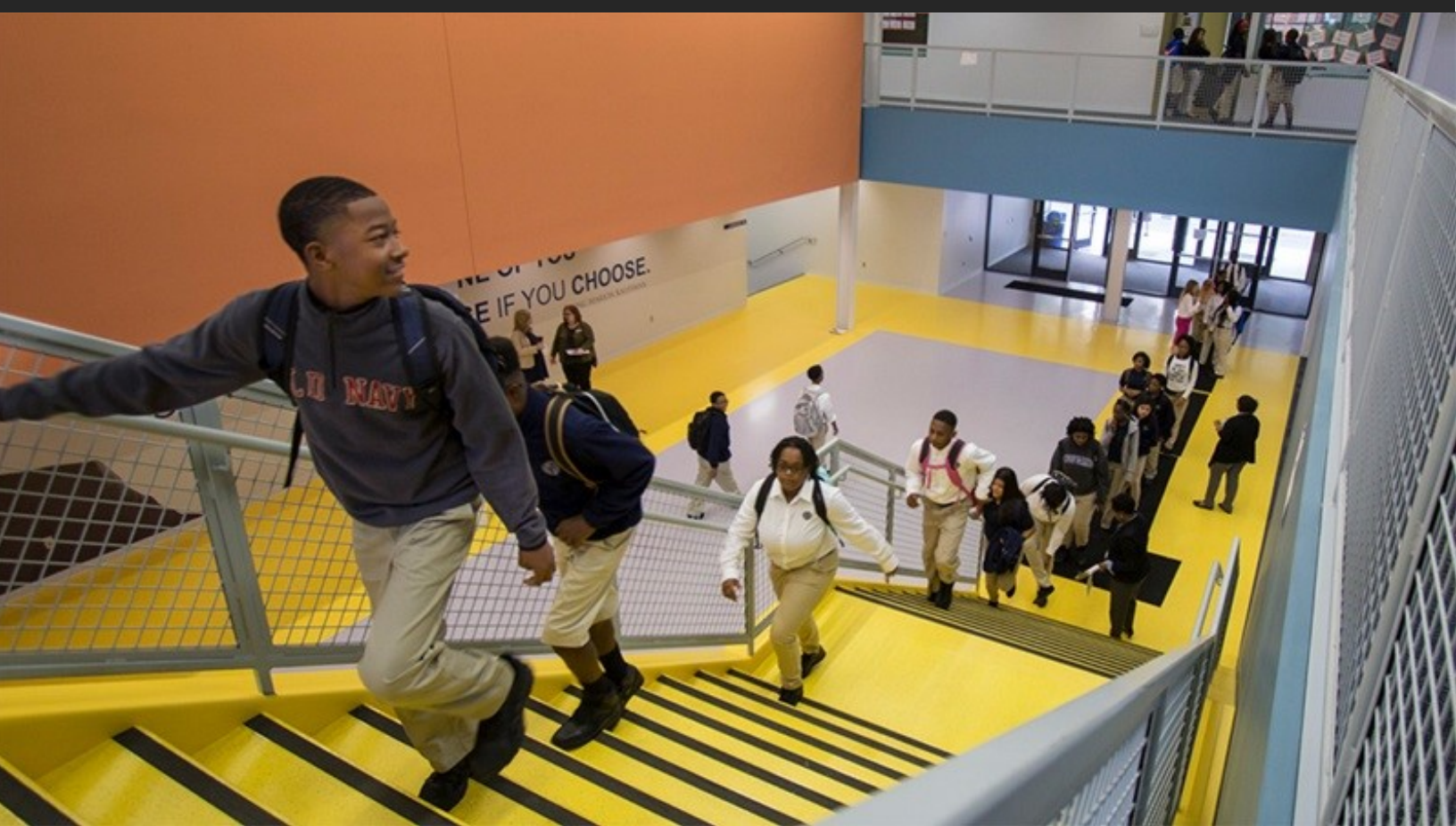


Ewing Marion Kauffman Foundation Evaluation Report Guidance

November 2017



Let's Do This.

At the Kauffman Foundation, we believe that evaluation should provide our staff with the evidence and insights necessary to drive continuous learning about our programs, strategies, and theories of change - ultimately leading to increased social impact over time.

To achieve this goal, data and findings need to be packaged and presented in ways that are accessible and actionable for a wide array of audiences inside and outside the Foundation. With that in mind, we are proud to partner with Evergreen Data to share the following guide to creating evaluation reports that incorporate current best practices and techniques in design and data visualization.

We want everyone to love sitting down to a fresh set of evaluation findings as much as we do, and I believe this guide can help us get there.

Matthew Carr

Matthew Carr, Ph.D.
Director of
Evaluation
Ewing Marion
Kauffman
Foundation



This guidance document outlines major changes to the way evaluation reports have traditionally been written. The changes here come from two important places: the research I've studied for the past 7 years and the requests of the staff at Ewing Marion Kauffman Foundation, who need to make sense of the report's content to improve the lives of those they serve.

Like most report recipients, they aim to cut to the chase. The guidance here will help you reformat how you communicate so you can achieve this goal.

The changes might seem monumental because the visual look of your report will be drastically different, but the amount of time it takes to actually enact such changes is manageable. You can do this.

This new way of reporting may well change how you communicate your data outside of EMKF audiences. It's contagious because its useful.

Stephanie Evergreen

Stephanie Evergreen, PhD
CEO, Evergreen Data



The Cover

Report covers should include:

Title
Report Author Names
Author Organization
Organization Logo
Date
Image

Stock Photography Websites

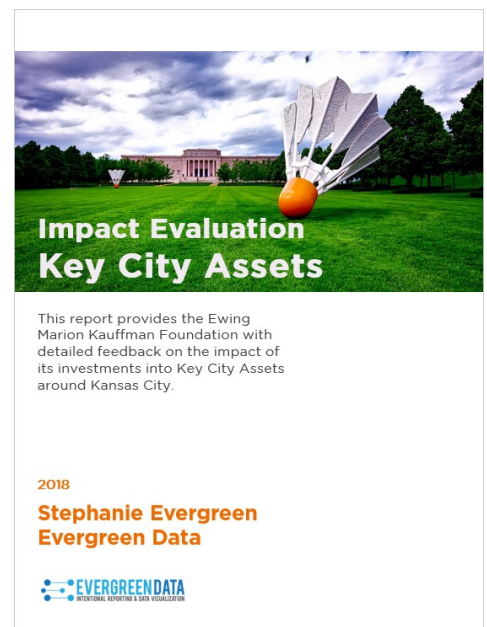
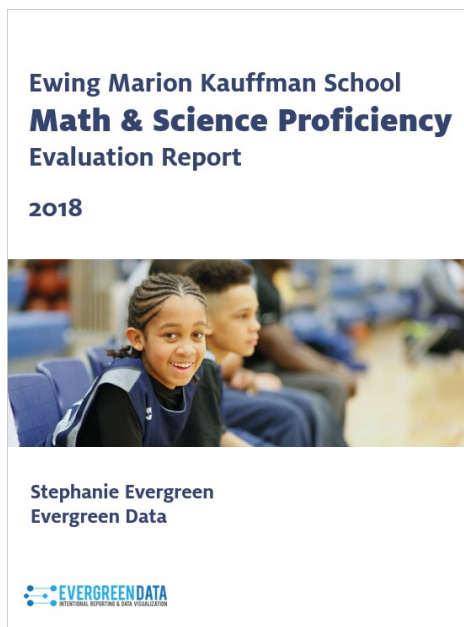
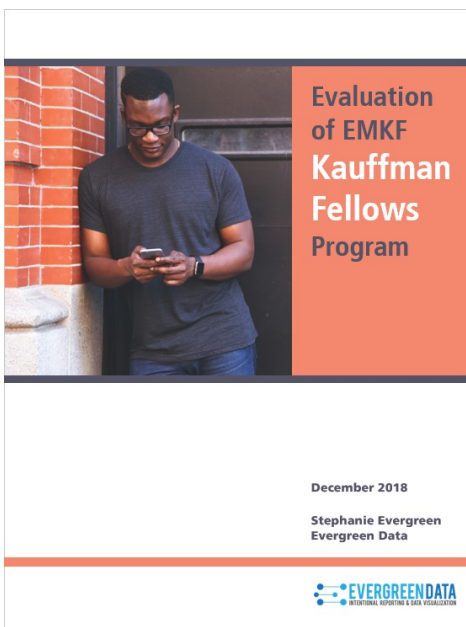
Shutterstock.com

iStockPhoto.com

Pixabay.com (free)

LifeofPix.com (free)

Not necessarily in that order. But, yes, all reports longer than 5 pages should have a cover that includes a visual related to the contents of the report. Place the title near the top of the page so that it is easily located when readers open the PDF. Arranging these elements on a report cover can take many formats. Here is a sampling of report covers to demonstrate just a few of your many options.



Note how these covers include pictures that are large, spanning a big section of the page, touching either the page edge or another shape. The pictures are crisp and high-quality.

Text is aligned all the way down the page for a clean look. The title itself is in a large font size to be seen from far away.

The Executive Summary

The executive summary is the most important part of an evaluation report. It is often the primary basis for review and discussion among internal teams, so it should be able to stand on its own.

For the EMKF audience, the executive summary should contain a small number of the key findings that are most relevant, surprising, and/or actionable for program staff. They should be visualized. Your main report should include quantitative or qualitative data visualizations showing the evidence to support your main findings. Repeat these visuals in the executive summary.

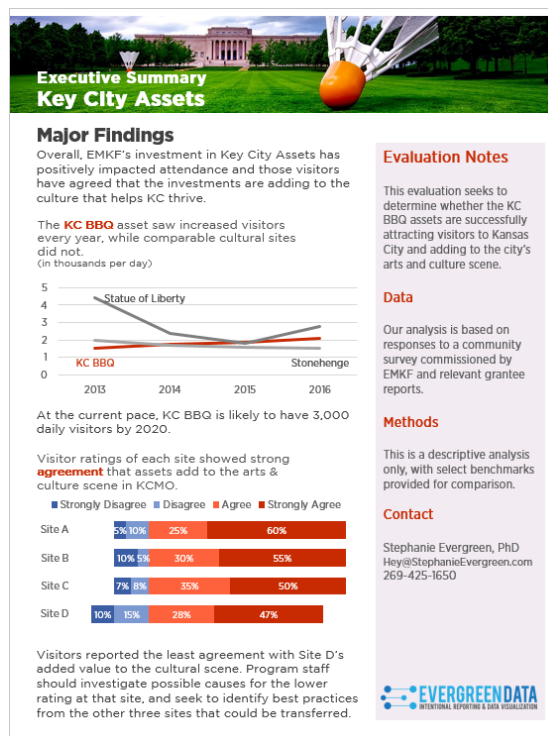
Include some interpretation or discussion of the findings so that staff can readily understand the implications for the program moving forward.

Only a sentence or two on the data and methods are needed in the executive summary. Readers want some indication of the rigor level to understand how concrete the findings are before they take action based upon them. This information should be summarized succinctly in sidebar, so as not to interrupt the main reading flow.

The length of the entire executive summary should be 1-2 pages.

Here is just one example of how an executive summary could look. It is not a template. You may need to use the space differently to convey your key findings.

Page begins with key findings, supported by visuals, with some interpretive explanation.



Sidebar includes background information like purpose, data sources, methods, and contact information.

The Front Matter

Front matter refers to the table of contents, the list of figures and tables, acknowledgements, and any other content often seen at the start of a report before the reader gets to the main narrative.

Try to condense any front matter content. For example, put the lists of tables and figures on the same page. Don't take up a full page for acknowledgements; list those in a sidebar elsewhere in the report.

Discussion of the background of the program being evaluated should be no more than one page, but consider moving this information to a sidebar. Background details of the evaluation itself or the evaluation approach should go in the appendix or in a sidebar. Methods and data sources also move to the appendix or a sidebar.

If there's a major caveat, summarize it in a few paragraphs in a sidebar and then refer the readers to a longer explanation in the appendix.

Condense this material so readers can more quickly read your primary points.

Do not add blank pages to the report. That is a remnant from when people mainly printed reports. EMKF reads reports electronically. No pages intentionally left blank.

The Subsequent Order & Length

After the cover, executive summary, and 1-2 pages of front matter, Kauffman readers want to get straight to the bottom line. They want to read the evaluation's findings first. This is not the way most people were trained to report on a study.

In the typical way of reporting, readers have to wade through descriptions of the research process, study design, and statistical tests before reaching the actionable findings needed to make decisions. Instead, put the reader's needs first. Give the bottom line upfront. Detailed discussions of methods, analysis, and design go at the end of the report or in an appendix.

The entire report, beyond the cover page, should be about 25 pages. Appendices are not part of this 25 page limit so use those abundantly for content that isn't critical.

No need for a back cover.

The Typical Order

1. Cover
2. Executive Summary
3. Table of Contents
4. List of Figures
5. List of Tables
6. Background
7. Design
8. Methodology
9. Analysis
10. Discussion
11. Findings
12. Conclusions
13. Appendices

Academic
In order of study
Focused on research process

The Action-Oriented Order

1. Cover
2. Executive Summary
3. Condensed Front Matter
4. Findings & Interpretation
5. Appendices
6. Methods & Analysis
7. Design
8. Background

Actionable
In order of reader need
Focused on data use & client

The typical order is how most researchers and evaluators were trained to write. It is the order journals expect and what most professors taught in academia. The purpose of the typical order is to bring a reader through the research chronologically. Findings don't appear until the end.

The action-oriented order is devised for a different audience, comprised of readers who are less interested in the chronology of the research and much more concerned about using the data to make informed decisions and take action. Findings are reported first, even by page 4 or 5 of the report.

As much as possible, use active, not passive prose.

Instead of:

Our analysis suggests there is an upward trend in enrollment.

Try:

Student enrollment increased.

The Narrative

Feel free to use your own organizational style guide for guidance on fonts. However, headings should be distinct enough from the narrative text that readers can easily distinguish one from the other and more quickly navigate through the report. Don't put headings in italics, which tends to make them stand out less.

Use a thick serif for narrative, like Cambria, so it can be read easily whether on screen or printed.

Headings can also pop out to the reader via creative options like color bands, icons, or other shapes.

Left justify headings. Centered text is harder to locate.

Major section headings should be full sentences that state a summarizing point.

Instead of:

**Impacts on science
achievement growth**

Check out these heading-narrative font pairs. Aim to make headings that differ from narrative in at least two ways, such as size and color, color and font, or font and size.

Franklin Gothic, size 18

Cambria, size 12

**Cambria, size 18, bold,
green**

Cambria, size 12

Arial Black, size 16, blue

Georgia, size 12

Try:

**Science achievement growth
was large.**

This revised phrasing gives the reader the main point at a glance. As a bonus, the table of contents now reflects take away points from the study.

The first sentence of the first paragraph for a major finding should state the key takeaway point, such as:

Students achieved approximately 6.1 years of learning in only 4 years.

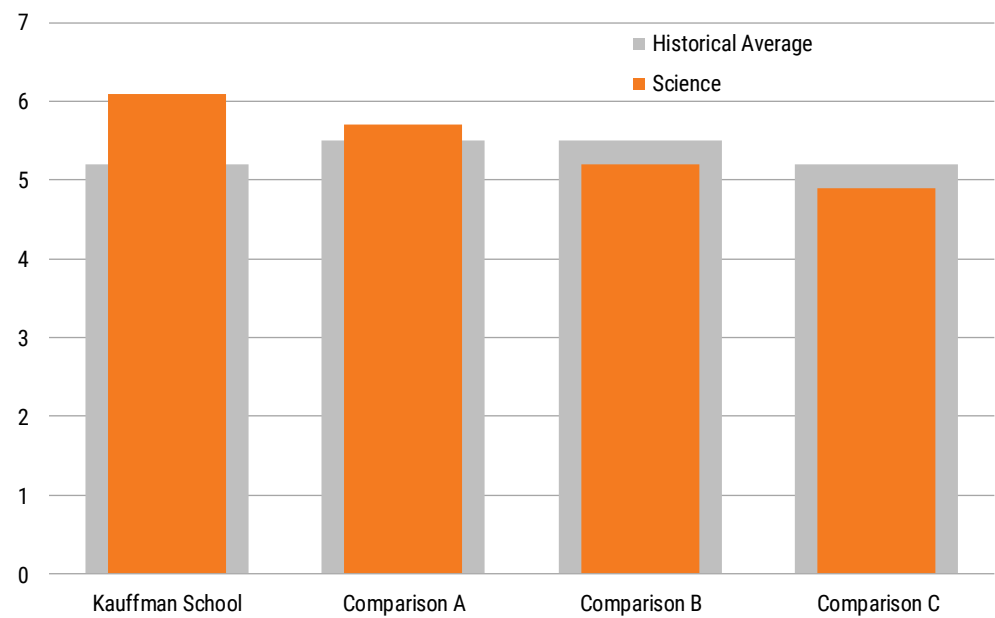
If you pose study questions, answer them directly in that first sentence and then provide enough interpretation to support decision making for the Kauffman audience.

Each major finding should be supported by a visual (not just a table) of the data used as evidence for that finding. The start of a section on findings could look something like this (all data are fictional):

Science achievement growth was large.

Students achieved approximately 6.1 years of learning in only four years. This growth exceeded 4-year learning rates in comparison schools, as shown in Figure 2.

Figure 2.
Kauffman Schools students learned more in four years than any comparison school and more than their own historical average.



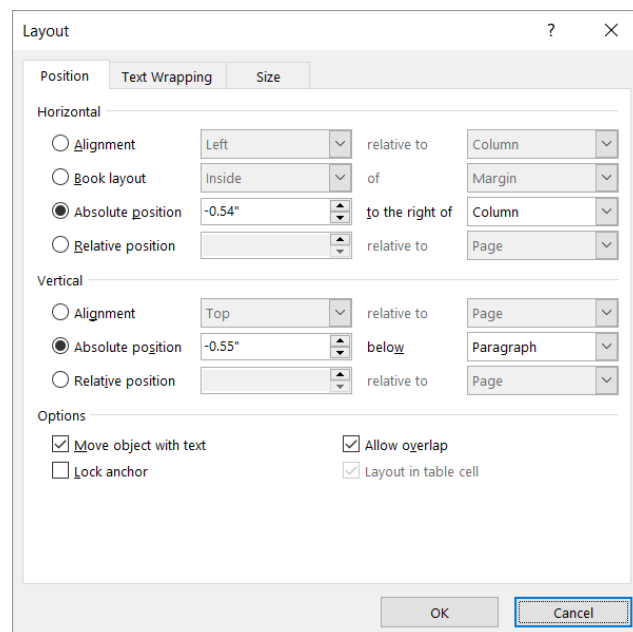
References to figures should be on the same page as the figures. If readers have to flip around between pages, they have difficulty connecting the visual to its narrative. Use sidebars and call out boxes liberally. Highlight important points with call out boxes. If problematic data (e.g., heavily caveated, questionable or nuanced) continues to arise, consider an icon or mark to indicate as much and explain in detail in a sidebar. Definitions should go in a side box or sidebar. Use these design strategies to keep the main narrative focused.

Sidebars extend most of the way down a page, on either the right or left, while call out boxes are shorter and can appear anywhere.

Sidebars and call out boxes are easy to add in programs like Microsoft Word. Insert a rectangle shape down the side of the page and type your text in there. Typically, sidebars are 1.5"-2.5" wide. Call out boxes can be up to 3" wide.

Sometimes these elements will move after you have inserted them. If that happens, right-click on the shape and select More Layout Options. Uncheck Move object with text.

The sidebar and call out box color will help convey your message.



White text in a brightly colored box will draw attention, so use this strategy to highlight important points, quotes, case studies and things like that.

Gray text on a gray background will minimize things, so use this strategy for content like acknowledgements, data methods, and approach.

In addition to their role in bringing attention to key information or removing some text from the reading flow of the main narrative, sidebars and call out boxes are also visual elements that break up a page. Consider using them on pages that are otherwise nothing but narrative.

The Graphs

Fonts in figures should be the same across the report. Consider using condensed fonts in your figures so that it is easier for you to label. Condensed fonts are also great for fitting text into sidebars and call out boxes.

Titles of figures should be full sentences that provide the takeaway idea presented in the graph. These titles should be left-justified. They should be sentence case, not the default which capitalizes every word. Titles should end with a punctuation mark.

Condensed fonts are thinner than their regular versions, which allows you to stick within the same font family, but design better data visualizations.

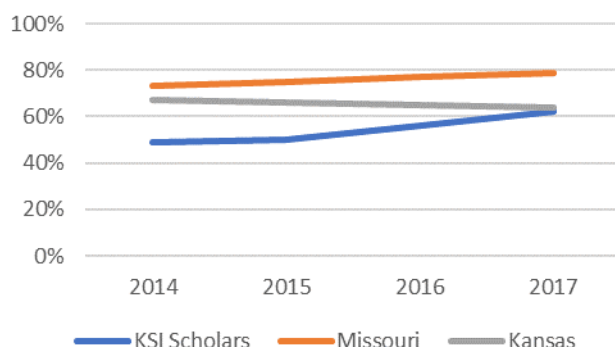
Franklin Gothic Demi
Franklin Gothic Demi Cond

Arial
Arial Narrow

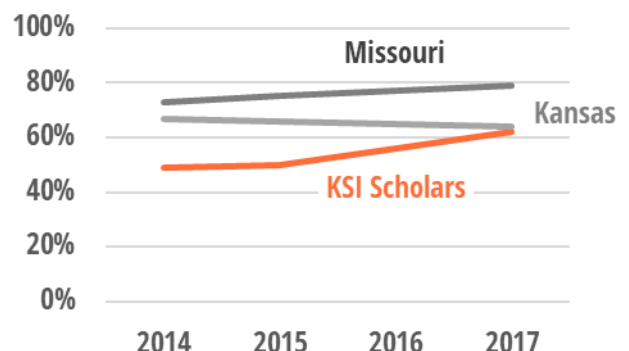
Gill Sans
Gill Sans Condensed

As much as possible, eliminate the default legends, which can make it hard to interpret a graph. Embed the legend directly into the graph space itself.

Instead of:



Try:



Graphs should not include bevels, shadows or other unnecessary decoration. Get rid of chart borders and tick marks. Do not use 3D graphs, which distort the data. All of these elements contribute clutter that gets in the way of your readers' ability to see your data clearly.

Both raw numbers and percentages don't always need to be provided in the main body of the report. Present the most relevant pieces (usually percentages) and refer readers to tables in the appendix, where you can supply more details.

To the extent possible, replace tables in the narrative with graphs that will visualize that data so readers can more easily interpret it. Tables are totally appropriate for appendices.

Generally speaking, tables generated from statistical software are not suitable for reporting. Do not copy and paste tables from these software directly into a report. Doing so often makes the table blurry and hard to read. Relevant information should be remade in a new table or visual, so that it is crisp.

Beyond that, tables from statistical software generally do not have enough interpretive power to make them reader-friendly. Most readers cannot glean information from a table of numbers. At best, you can place this information in the appendix and use the main narrative to tell the story about what those statistics mean. Offer interpretation, rather than just description.

Tables, if any, should have faint gray horizontal gridlines and white space in each row and column. Don't box in every cell and don't use black borders.

Instead of:

	Kauffman School	All Kansas City public schools	Kansas City charters
Free or reduced price lunch	0.94	0.93	0.92
English language learner	0.00	0.17	0.07
Disabled	0.02	0.07	0.02
Sample size	64	1,337	406

Try:

	Kauffman School	All Kansas City public schools	Kansas City charters
Free/reduced price lunch	0.94	0.93	0.92
English language learner	0.00	0.17	0.07
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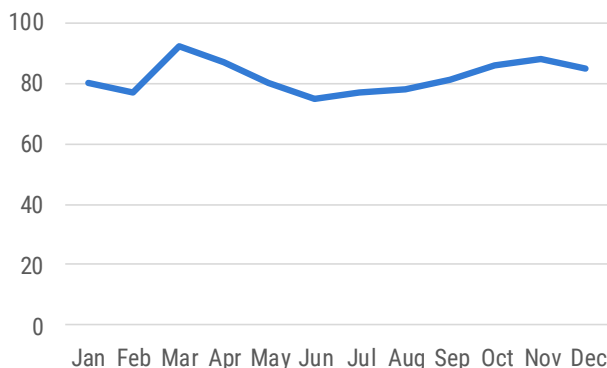
If you do provide tables in the main report, make sure the narrative text supporting the table expands upon what it shows. The narrative should not simply repeat what is in the table. For example, to describe the table above, the narrative could say “The Kauffman School has a similar percentage of free and reduced price lunch students as compared to All Kansas City public or charter schools.”

Limit reporting to as few decimal places as are necessary to communicate your point. You are welcome to use your organization's own color scheme, but please be sure that your visuals are colorblind safe. Avoid red-green color combinations. For maximum legibility, only use white chart backgrounds.

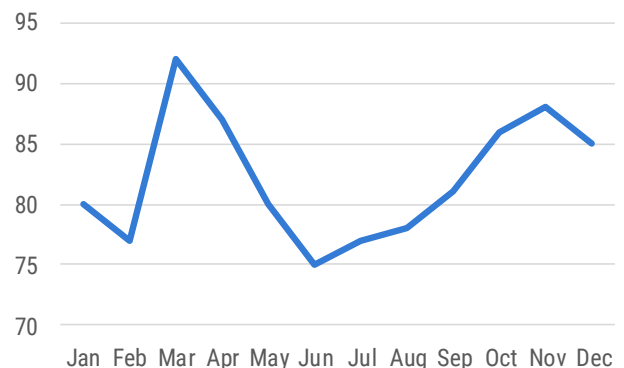
Certain chart types will help you more clearly illustrate your points. Bubble charts, for example, are rarely interpretable. Pie charts with more than 4 slices are better off remade into bar charts.

The y-axis scale is also a part of the story being told in your data. The y-axis scale on bar charts must always start at zero, so as not to distort the length of the bar, which is encoding the data. The y-axis on other charts can be more flexible, but you should review the scale you choose to make sure it is reflecting an accurate story.

Meeting attendance peaked in March.

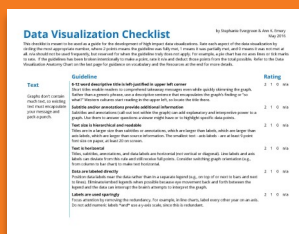


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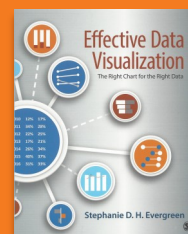


The graph on the left starts its y-axis at zero, but the change month to month is harder to spot. Changes are easier to see in the graph on the right, but the axis doesn't start at zero. Talk about the most transparent depiction with your EMKF evaluation associate if you are concerned about visualizing accurately.

For more on data visualization, see...



Evergreen's Data Visualization Checklist



Evergreen's book, Effective Data Visualization

The FAQs

What software should I use for reporting?

You can use any software that works best for you. Some people even use PowerPoint for reporting. The software platform is not as important as making sure the report is readily understood by your primary audiences at Kauffman. Great reporting can be done inside Microsoft Word.

Do I need to buy a special software program to make better charts and graphs?

No. Word and Excel have the functionality to meet these guidelines.

Do we need to budget for a graphic designer so our reports meet your guidelines?

No. There are some simple ways to make a great, accessible report.

Contact to your EMKF Evaluation Associate to get answers to additional questions, help guide design decisions, and review drafts to ensure your reports meet EMKF standards.

Who are Kauffman's key audiences?

Program staff, the Senior Leadership team, and our Board of Trustees. Depending on the project, we may also seek to share findings with external audiences as well.

Are we oversimplifying results and losing important nuance in trying to get all the key findings into a short executive summary?

Important context and nuance should be included in the appendix. If you are concerned that a finding could be misinterpreted without sufficient narrative context, raise the issue with an evaluation staff member and we'll find a solution together.

Do these guidelines apply to all reports, or only final reports?

These guidelines generally apply to all reports, but your evaluation officer may request more informal interim updates than what's specified here.

About Us

The Ewing Marion Kauffman Foundation is a private, nonpartisan foundation that works together with communities in education and entrepreneurship to create uncommon solutions and empower people to shape their futures and be successful.

The Kauffman Foundation is based in Kansas City, Missouri, and uses its \$2 billion in assets to collaboratively help people be self-sufficient, productive citizens.

At the Kauffman Foundation, we believe measurement and evaluation are vitally important to achieving our mission to help people become economically independent by advancing educational achievement and entrepreneurial success.

Evaluation provides Foundation leadership and staff with rigorous evidence to support strategic learning and inform decision-making about grants and the programs we operate directly.

For more information, visit www.kauffman.org.

Evergreen Data is an internationally-recognized design and data visualization consulting firm, known for bringing a research-based approach to communication through more effective graphs, slides, and reports. The CEO, Dr. Stephanie Evergreen is a Fulbright scholar who has trained evaluators worldwide through keynote presentations and workshops, for clients including Verizon, American Institutes for Research, Rockefeller Foundation, Brookings Institute, and the United Nations.

She is the 2015 recipient of the American Evaluation Association's Guttentag award, given for notable accomplishments early in a career and the 2017 recipient of the Myrdal award for impacts on practice. She writes a popular blog on data presentation at StephanieEvergreen.com. Her book, *Effective Data Visualization*, was published in Spring 2016. Her other book, *Presenting Data Effectively*, was just published in its second edition in June 2017. Both books hit #1 on Amazon bestseller lists.

