Report writing and presenting evaluation results: tips for telling your story

Introduction

New Philanthropy Capital (NPC) and Clinks are working together on the *Improving your evidence* project to support Voluntary, Community and Social Enterprise (VCSE) organisations working in criminal justice to improve their capacity to identify, produce and use good quality evidence and evaluation. We recommend that all monitoring and evaluation work conducted by charities is written-up and published so that we can learn from each other's experiences.

Often the task of drafting and composing an evaluation report is the final consideration in an evaluation strategy, but it should really inform your whole approach from the beginning. Having a clear plan for how you are going to present information will ensure your monitoring and evaluation covers the right issues, is focused and comprehensive.

When thinking about how you will report data, the sheer amount of information you have available can be overwhelming, particularly for smaller organisations with limited resources; and to judge the appropriateness and quality of that information may be something you are not experienced in. This guide responds to this challenge by providing tips on how to approach report writing, a suggested template, links to good examples and additional information to help you explore the topic further.

Good and bad practice

Firstly, it is worth highlighting some elements of good practice that will help you avoid some common errors. These are taken from an earlier NPC report[1] on good and poor practice in impact reporting:

- Ensure there is a clear statement about the problems and needs that you are addressing and why they are important to address (e.g. context, numbers and vulnerabilities of the beneficiaries and the impact on their lives of not having or accessing interventions and services).
- Link the delivery and success of services to the longer-term aims and objectives (including the vision) of your organisation.
- Avoid reporting on 'outputs' and instead focus on outcomes – the changes and improvements to the lives of clients/service users.
- Don't rely too much on case studies and make sure you understand evidence quality standards[2].
- Reflect on the learning gained from monitoring and evaluation and show how you plan to apply this in future work.

[1] *Talking About Results*; NPC, 2010. http://www.thinknpc.org/publications/talking-about-results/

[2] See our guide on standards of evidence for more information : http://www.clinks.org/sites/default/files/StandardsofEvidenceGuide.pdf

- Embed your outcome and impact findings within the wider body of criminal justice/desistance research around working with offenders and people at risk.

Overall structure

When starting to think about your approach consider the key overall questions you want your evaluation to cover. For example:

- What is the problem/need you are addressing?
- What are the activities you do, or interventions and service you provide, to address those identified problems and needs?
- What are you achieving with your clients/service users in relation to the interventions and services you provide?
- How do you know what, and how, you are achieving? What is your evidence, and can you produce that evidence to a credible research standard?
- What are you learning about your work and how you can improve, and are you gaining a greater understanding of your clients/service users?

We recommend using a theory of change approach to help you consider these questions[3].

A reporting template

There are many reporting templates available, but they tend to all be fairly similar. We have summarised the key points below:

Title page

This should include the name of the project/organisation; the date; the period covered by the evaluation; the name of the evaluator (if it is independent, conducted by an external person/organisation; or if it has been conducted internally).

Table of contents

A list of the sections or chapters, and subsections in each section/chapter and page numbers.

Acknowledgements

This might be general e.g. 'thanks to our service users who participated in the evaluation'; or specific named persons with their permission.

Glossary

An explanation of the terms, jargon and abbreviations used in the report. Remember to spell out all abbreviations in the first instance followed by the abbreviation in brackets.

Executive summary

[3] See our guide for more information : http://www.clinks.org/support-evaluation-and-effectiveness/demonstrating-outcomes

This may be all that some of your audience reads, so make it count; no longer than two pages briefly noting what was evaluated and why; presenting the ‘headlines’ of the key findings, lessons learned, and recommendations from your evaluation. Keep sentences short and use bullet points.

Introduction to the evaluation and methods

While some reports place this section in the appendices, it is better placed early on as it provides key information to help the reader assess the accuracy of the findings. Good practice in discussing these issues is to outline:

- The purpose of the evaluation and the key questions you sought to answer (For example, ‘among our client group of men/women/young people who accessed our services between (dates) we evaluated how many re-offended during their association with our services, and the frequency and severity of that re-offending.’)
- The evaluation team.
- A full description of the method(s) used to collect information (focus groups, self-completion questionnaires, interviews, observations). Examples of the tools used, such as questionnaires and/or interview questions asked, should be placed as an appendix.
- Who took part (numbers and characteristics – i.e. all clients; or all women/men/young people accessing the service).
- How participants were selected (for example, at random and/or over a period of time).
- Information on how you dealt with or followed-up on non-participants in the evaluation.
- Commentary on the strengths and weakness of your approach and methods.
- How you collated and analysed the information/data (by hand, Excel or a database such as Access).
- How confident are you that the evaluation accurately reflects the outcomes and achievements of the evaluated group as compared against those of your whole client population? In this section, there is significant value in noting government and academic research findings related to the outcomes/impact/success of your services and interventions as delivered by other organisations. For example, ‘research (cited) shows that success is achieved by similar types of clients who benefit from a similar type of intervention/service to ours’.

The rationale for your service

Whilst it’s not always included, we think it’s important to demonstrate a high level of thinking and consideration of why you are doing what you are doing - your reasons for developing and delivering the intervention/service/programme which was evaluated. Do not take for granted that your reader will understand much about you, your work, and your clients/service users. Nor will they necessarily understand the rationale behind your service or approach, nor the context of your work. Questions to answer in this section include:

- How did you identify the problem/need?
- Why did you decide to address it?

- What were your overall aims, objectives and planned outcomes for your work/project? Who were your planned beneficiaries? And what was the context of your work (the setting or environment in which you are working). For example, 'a criminal justice sector which is experiencing rapid and difficult changes for the wider voluntary sector and our clients/service users.'
- How and why did you decide on the approach and methods you used in addressing the problem/need? What confidence did you have that it would 'work' and be successful? What predictions did you and other experts in the field make for success?
- In addition to your organisation/project, who else has worked with similar clients in similar ways; and what has been their experience? Did your intervention/service replicate good practice, build on it; or did you take a different approach? In short what was your Theory of Change – its rationale, and how/who else has tested it? Citing external research and studies will be useful in 'validating' your rationale and approach.

About your service and its activities

Describe your inputs and activities: What interventions/services did you provide (activities) and with what resources (funding, staff, cost of the service/project). Did you work with partner agencies or with the wider community in service delivery?

Presentation of findings and results

This section should focus on what you have achieved in terms of outputs and outcomes. It should closely follow the theory of change and include key performance indicators and measures of your performance against specific goals, usually quantifiable, such as the number of clients engaged, the number attending training, the number of training sessions, and service user feedback on how they found the service. As well as these figures (quantitative) it will also help to present qualitative information (in-depth research that helps us to better understand behaviour).

To avoid the presentation of findings getting muddled and appearing random, consider organising it by a logical sequence such as:

- Number of clients who engaged.
- Number of those who attended workshops/clinics/groups/training etc.; number of those who completed each activity.
- Their feedback.
- The outcomes/impact of your work on them – reduced re-offending, successfully maintaining tenancy after 3 months, successfully maintaining education or a job after 3 months, etc. (information which lends itself to charts and graphs).

Also, be sure to address your key evaluation questions. For example:

'One of the key questions posed in this evaluation was that we wanted to know from among our client group of men/women/young people who accessed our services between (dates) how many re-offended during their association with our services, and the frequency and severity of that re-offending. In answering this question the data has shown……'

It is also important to include a discussion on 'attribution' (we recommend using a theory of change approach[4] and relating this to it), and which outcomes you think relate to which interventions/activities – ask the question:

'How can you be sure that your interventions and service is what made a difference to the outcomes for your client? How much of your work can you attribute to your clients' successes rather than some other factor?'

This is often referred to as 'contribution analysis' and we recommend visiting the following link for more information: http://www.scotland.gov.uk/Resource/Doc/175356/0116687.pdf

Case studies add value because they bring statistics to life - but don't over use them. The case studies you select should represent the majority of your clients (their profile and needs) and the successes/outcomes achieved. Do not cherry pick your case studies to illustrate the best outcomes. Draw key descriptive themes from the case studies and relate them to the whole of your service and what it is seeking to achieve with its clients/service users (referring back to your theory of change). For example:

'Joe, like the majority of our clients, came to us in need of……After a period of engagement, Joe was able to achieve…….With our support (of mentoring, training, etc.)……., he and the majority of our clients/service users have experienced improvements in their lives such as……'

Learning and recommendations

This section should include a discussion of your findings, the learning achieved and recommendations for actions to be taken as a result of the findings. It should add to your rationale and approach with further reflections on your work and its success (as predicted/anticipated as well as not predicted). Most importantly, outline what you have learned:

- How have the findings and evaluation process informed your practice and developed understanding about your work with offenders?
- What has and has not worked or gone to plan, and why?
- Are there contrasts/comparisons to be made with other types of approaches?
- What improvements and refinements can and should you make in light of the findings and learning?

Conclusions

This section allows you to consider whether your work delivered your organisations aims and objectives, and to what degree. Present headline answers to the evaluation questions and give an honest assessment of the success of your work in improving the lives of

[4] See our guide for more information : http://www.clinks.org/support-evaluation-and-effectiveness/demonstrating-outcomes

clients/service users. Consider where your data gathering and learning has fallen short and how you would improve/refine your approach.

It's especially important to be upfront about failure and anything that has not gone well - because this is how we learn. Funders/commissioners should be more confident in an organisation that shows it is robust in assessing its performance and learns from it, rather than an organisation that only reports positive findings.

What are the wider implications of your findings? For example, do they make a wider contribution to the body of knowledge in working with offenders; the role of the VCSE Sector; policy development in the Ministry of Justice/Criminal Justice etc?

Provide some key bullet point recommendations which relate to your practice and approaches; who and how you engage; ideas for improving partnerships and/or referrals; internal systems, processes and communications. Also, what improvements and changes have you identified to improve your monitoring and evaluation system?

End with the key headline messages you hope the reader will remember and reflect on.

Appendices

The following are some of things you might include in the appendices of the report:

- Copies of the monitoring tools (your initial assessment form might be of interest as well as questionnaires, questions used in focus groups or in interviews).
- End notes (citations of research and materials of interest referred to in the body of the report).
- References – another way of displaying citations and any other materials you have made use of which you found helpful in conducting the evaluation.
- Contact details of a person who can answer any questions or address comments.

Summary checklist - what a good report conveys and contains

- Clear data – can novices understand it? Does it address the interests of your different audiences/stakeholders?
- Outlines how you intended to meet an identified need.
- Presents your rationale, your planned and predicted outcomes and impact and why they are important to the clients/service users, the sector and the wider community; the context of your work and circumstances of your clients.
- Interprets the findings: what the information means and implications.
- Gives context (things which may have had an impact on your achievements e.g. loss of key staff, moving offices, loss of other key funding, etc.)
- Includes some user feedback – but 'no stories without numbers and no numbers without stories'; state the degree to which the stories and the numbers are representative of the whole of your client set – not cherry picked.
- Explains how the outcomes statistics were gathered (your methodology); forms or questionnaires used to gather data should be attached as an appendix

Other important considerations

- Present and interpret your outcomes information in the light of what is known about your area of work.
- Given the client group you're working with or the activity you're engaged in, consider the experiences from other organisations in your field.
- Don't miss an opportunity to 'educate' and 'agitate' on behalf of your clients, your work and your sector.

Examples of good practice

It is valuable to look at what others have produced; this includes larger, better resourced organisations whose budget for production may be out of your range, but nonetheless, a great source for ideas on presentation and good practice.

Some of the documents below are dated but they remain good examples of reporting and evaluation.

Working with Complexity: Meeting the resettlement needs of women at HMP Styal
2006 report from Revolving Doors Agency based on a needs assessment of the issues faced by women in HMP Styal with mental health problems who are returning to Greater Manchester. It examines why they become caught up in a cycle of abuse, crisis, drugs, breakdown and crime followed by imprisonment.

Lost in Translation
2005 interim findings from the Revolving Doors Agency Young People's Link Worker schemes.

Bad Girls? Women, Mental Health and Crime
2004 report by Revolving Doors Agency on women, crime and mental health.

Snakes and Ladders
2003 findings from the evaluation of the Revolving Doors Agency Link Worker Schemes.

Mental health, multiple needs and the police: Findings from the Revolving Doors Agency Link Worker Scheme
2000 findings from Revolving Doors Agency's Link Worker Schemes ion Bethnal Green, Islington and High Wycombe.

The Horse Course Interim Evaluation Findings
2012 report providing a very good example of the presentation of an evaluation approach and method.

Talking about results
2010 report from NPC exploring outcomes/impact reporting. Contains tips for how to improve reporting and what funders do and should be looking for.

Turning the tables
NPC report into the ‘politics of reporting’ from 2008 .

Hallmarks of Excellence #7 Impact measurement
2013 Charities Aid Foundation (CAF) guidance includes useful discussions and case studies of good evaluations.

Centrepoint reports
Centrepoint was a finalist in the Third Sector Excellence Awards 2013 for the best Annual Report. Have a look at their Financial Report or the Annual Tenants’ Report 2013.