



Communication Plan Checklist for ATE Principal Investigators and Evaluators

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Creating a clear communication plan at the beginning of an evaluation can help project personnel and evaluators avoid confusion, misunderstandings, or uncertainty. The communication plan should be an agreement between the project's principal investigator and the evaluator, and followed by members of their respective teams. This checklist highlights the decisions that need to be made when developing a clear communication plan.

- Designate one primary contact person from the project staff and one from the evaluation team.** Clearly identify who should be contacted regarding questions, changes, or general updates about the evaluation. The project staff person should be someone who has authority to make decisions or approve small changes that might occur during the evaluation, such as the principal investigator or project manager.
- Set up recurring meetings to discuss evaluation matters.** Decide on the meeting frequency and platform for the project staff and evaluation team to discuss updates on the evaluation. These regular meetings should occur throughout the life of a project.
 - Frequency** — At minimum, plan to meet monthly. Increase the frequency as needed to maintain momentum and meet key deadlines.
 - Platform** — Real-time interaction via phone calls, web meetings, or in-person meetings will help ensure those involved give adequate attention to the matters being discussed. Do not rely on email or other asynchronous communication platforms.
 - Agenda** — Tailor the agendas to reflect the aspects of the evaluation that need attention. In general, the evaluator should provide a status update, identify challenges, and explain what the project staff can do to facilitate the evaluation. The project staff should share important changes or challenges in the project, such as delays in timelines or project staff turnover. Conversations should close with clear action items and deadlines.
- Agree on a process for reviewing and finalizing data collection instruments and procedures, and evaluation reports.** Determine the project staff's role in providing input on instruments (such as questionnaires or interview protocols), the mechanisms by which data will be collected, and reports. Establish a turnaround time for feedback, to avoid delays in implementing the evaluation.
- Clarify who is responsible for disseminating reports.** As a rule of thumb, responsibility and authority for the distribution of evaluation report lies with the project's principal investigator. Make it clear whether the evaluator may use the reports for their own purposes and under what conditions.



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CREATING ONE-PAGE REPORTS

RESOURCES

HANDOUTS

These handouts will help guide you through the creation of a one-page report, getting feedback, and a few tips and tricks on using PowerPoint to design your report.



10-Steps Guide



Worksheet



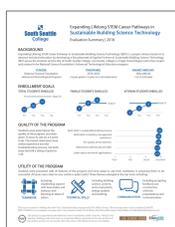
Feedback Form



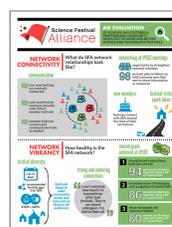
PowerPoint
Tips & Tricks

EXAMPLES

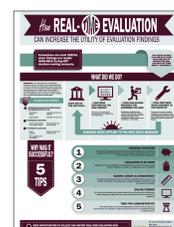
As you are getting started, it's often helpful to look at examples of similar work. We have collected examples from the ATE community and have a Pinterest board full of other ideas.



South Seattle
College



Science Festival
Alliance



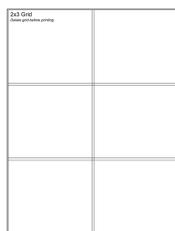
Real-Time
Evaluation



Webinar
Report

GRIDS

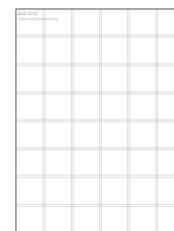
When thinking about layout, we recommend starting with a simple grid. Use these free grids by inserting them as images in any document. They will help you space and align your content.



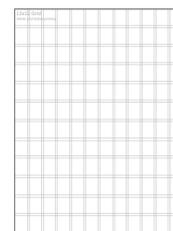
2x3 Grid



3x12 Grid



6x8 Grid



12x12 Grid

VIDEOS

There is a four-part video series that walks through the introduction to one-page reports, the 10-steps to creating, and some tips and tricks. Check them all out or just watch one.



An Intro to
One-Page Reports



Building the
Foundation



Visual
Strategies



Final
Touches

SOFTWARE TIPS

We use PowerPoint to design our one-page reports. We also recommend a few websites for icons, images, and graphic design.



Design:
PowerPoint



Icons:
nounproject.com



Images:
unsplash.com



Design:
canva.com



All resources are online! To get these resources, point your camera phone here.

Created by Emma Leeburg & Lyssa Wilson Becho
2019, Version 1 | evalu-ate.org/onepager



10 STEPS TO CREATING ONE-PAGE REPORTS

1. Identify the audience
2. Identify the purpose
3. Prioritize the information
4. Choose a grid
5. Draft the layout
6. Create an intentional visual path
7. Create a purposeful hierarchy
8. Use white space
9. Get feedback
10. Triple check consistency



Communication Platforms for DATA COLLECTION & STAKEHOLDER ENGAGEMENT

Handout by Ana Councill

When looking at online platforms to make virtual evaluation possible, it is important to consider the types of activities that you will need to do. These include interviews, surveys, collaboration, and planning sessions. Below are some communication platforms for data collection and stakeholder engagement.

ALL-IN-ONE PLATFORMS

Whether you're looking to hold virtual stakeholder meetings, conduct video interviews, or brainstorm on a whiteboard, these platforms are great choices for a one-stop shop.

	Price	Video calling	Instant Chat	Whiteboard	End-to-end encryption
 GoToMeeting gotomeeting.com	\$12/ Month	✓	✓	✓	✓
 Microsoft Teams teams.microsoft.com	Free with 365	✓	✓	✓	✓
 G Suite gsuite.google.com	\$6 / Month	✓	✓	✓	✓
 ZOHOO zoho.com/remotely	Free till July '20	✓	✓	✓	✓

VIRTUAL MEETINGS / INTERVIEWS

When considering one-on-one interviews or group planning meetings, video and audio calls are the new reality.



Google Hangouts
hangouts.google.com

As part of G Suite, Hangouts is ideal for groups with fewer than 25 participants.



Powered by
zoom
zoom.us

Never underestimate the power of a fun background. Just remember to keep meetings short with the free version.



zoho.com/meeting

One-on-one meetings are included in the free program, but the paid version can allow up to 20 hosts and 100 participants.



SURVEYS

If you're not already using an online survey platform, these are some free, easy-to-use options.



Great for current users of G Suite. Potential for storage limitations with the free version.



Though a free version exists, the paid platform offers design and layout options that allow you to really personalize the experience.



Free version offers stock templates with limited customization. For more bang, pay the buck and buy the full features.

STAKEHOLDER ENGAGEMENT

Brainstorming, collaborative decision making, and design visioning with remote teams **are all** easier with virtual whiteboards.



3 free "endless" boards included in the free membership. The interface makes real-time collaboration fun and engaging.



Lots of templates to customize your idea boards. A free trial allows you to try before you buy.



Great option for users of the all-inclusive G Suite. Offers over 400 sketch shapes.

SHARED DOCUMENT CREATION

Setting up a standing shared folder is a great way to share evaluation reports, logic models, and data collection instruments with collaborators.



With a gmail.com email address anyone can create, share, and collaborate in Google Docs or Microsoft Office documents.



The ability to chat and edit a document simultaneously outweighs the confusing file structures.



File version tracking, a chat feature, and integration with G suite, Office 365, and Slack make Zoho a game changer.