

Executive Summary: Bottom Line Format

Frank G. Cookingham; EvalFrank.com; January 2017

Often the Executive Summary is the only part of an evaluation report that is read by key decision makers. Therefore, it is essential that the information in the summary accurately reflects conclusions and recommendations supported by evidence in the detailed report. These comments are focused on the accuracy and interpretability of the Executive Summary.

Evaluators design the format and content of an executive summary to convey their interpretation of what the client wants to know. The summary is brief. It should specify decisions or actions that the evaluators believe are justified by the evaluation evidence. This information is contained in the conclusions and recommendations.

Conclusion: the answer to a specific question included in the evaluation design, or an interpretation of outcomes related to a particular information need. A conclusion must be logically consistent with available evidence, as well as relevant knowledge and experience. Sometimes the evaluation will conclude that the question cannot be answered by the available evidence, knowledge and experience. If this is the case, it should be clearly stated along with a description of what would be required to answer the question.

Recommendation: a statement offered as worthy of acceptance or approval by stakeholders. Based on available evidence, knowledge and experience the evaluator is saying that it is reasonable for stakeholders to adopt the action included in the statement. It is essential to keep in mind, however, that as stakeholders consider the recommendation in light of other factors, stakeholders may decide reasonably not to adopt the recommendation. If stakeholders are involved in the interpretation of evaluation results before the report is prepared, the report is less likely to contain recommendations which are not adopted.

Bottom Line

Most program stakeholders expect evaluation recommendations to describe feasible actions that will improve the program evaluated or other similar programs. That is the bottom line.

This outline for the Executive Summary is consistent with a “bottom line” perspective where results are presented first, followed by contextual information.

- a. Brief description of evaluation purpose, along with estimate regarding extent to which the purpose was achieved.
- b. Description of conclusions and recommendations.
- c. Program background
- d. Evaluation methodology

Evaluation purpose

One or two sentences can convey the intent of the evaluation. Describe the location of details about the purpose and specific objectives in the detailed Report. In one sentence describe stakeholder views about the extent to which the purpose was achieved.

Is relevant information in the summary?

The essence of all conclusions and recommendations should be summarized in the Executive Summary.

The Summary should not contain information that is not in the main report.

I suggest that the evaluator prepare a table before releasing the report that compares information in the Summary about conclusions and recommendations with the corresponding information in the Report. As the table is prepared the description in the Report or the Summary may be refined until they are consistent.

Recommendation/Conclusion in the Report	Recommendation/Conclusion information in the Summary
1. Exact wording of the recommendation/conclusion. [Sufficient trustworthy evidence that supports the exact wording?]	Summary is accurate; does not simplify the context for the recommendation/conclusion
2.	
Etc.	

The client can include in the evaluation terms of reference that such a table be presented to the client prior to the final report being released. This will reduce the possibility that stakeholders will not be willing to share the report beyond those who are closest to the program.

Highlighting selected results

Highlighting positive results is a common practice, but highlighting should not encourage distorted impressions about the merit and worth of the evaluated program. Think about the times you read a news article based on the headline and concluded that the headline misrepresented the essence of the article.

I suggest that the evaluator prepare a sheet that contains only the highlighted material in the Executive Summary, and the Summary without the highlighted material. Have several stakeholders examine the highlighted material and describe their overall impression of what they believe the detailed report will say about the value of the program. Have a few other stakeholders examine the Summary without highlights and describe their impressions of what the detailed report will say. Reflect on differences in the descriptions and revise the Summary as needed to minimize eliciting misleading impressions.

Program background

Include just the information about the program that is needed to see the relevance of the conclusions and recommendations.

Evaluation methodology

Simply describe the primary means for collecting and analyzing information, and who participated in planning and implementing the exercise.

May writing executive summaries that clearly shows the bottom line for the evaluation lead to more transformative community development. Comments welcome.