

Chapter 8. Share Lessons Learned

What's Inside?



What this chapter contains

- A description of communication planning
- Recommendations for developing reports and other communication products
- A discussion of communication channels and partners
- Examples of ways to apply culturally responsive and equitable principles when sharing lessons learned

Who can use this chapter

- Evaluation team members involved in evaluation reporting and communication

Click the links below to view the relevant section



Introduction

Evaluation is an applied science: It is designed to generate information and practical and actionable knowledge that leads to improvements in the program, activity, or policy being evaluated.

Transparency

As discussed in [chapter 1](#), ACF's Evaluation Policy (2021) highlights transparency as an important principle. Sharing evaluation findings—whether good, bad, or null—is one way to ensure transparency and in turn, foster positive change.

To increase the chances your evaluation fosters positive change, focus on two elements when sharing the evaluation's lessons learned:

Element 1

Communicate your lessons learned clearly and succinctly through multiple formats tailored to your target audiences.

Element 2

Communicate lessons learned widely, so many people, organizations, and decision-makers can access your products.

This chapter provides advice and recommendations to support transparent communication and sharing your evaluation's findings. It describes various ways you can “tell the story” of the program you evaluated.

Plan for Communication and Dissemination

A communication plan helps you prepare to share your work and findings. While communication and reporting are discussed last in this Guide, don't wait until you've completed the analysis activities described in [chapter 7](#) to start thinking about reporting and communication. Ideally, you will develop a communication plan alongside or shortly after you craft your evaluation plan. Communication is a part of the research process and entails sharing your work and your findings to audiences and engaging reciprocally with them (CWCC Evaluation TA Team, 2021).

What is the difference between communication and dissemination?

Dissemination involves a one-way broadcast of information from a single origin, while communication involves active exchanges between two or more parties.

Communication plans can use different structures or organizational plans to capture the information needed to share lessons learned. In this chapter, we use the *Evaluation Dissemination Planning Guide: Building Capacity to Evaluate Child Welfare Community Collaborations to Strengthen and Preserve Families* (CWCC Evaluation TA Team, 2021) as a recommended structure.

Broadly speaking, your overall communication plan should be based on three factors:

Factor 1

Identify the communication budget

How much money does the evaluator and the program have to devote to communication? When are those dollars available? What restrictions might you have on how you spend those funds? Project budgets should reflect the importance of communication in ensuring that evaluation findings are used by relevant audiences.

Factor 2

Establish roles and responsibilities

While the evaluator typically leads communication of evaluation findings, program leadership may consider using findings more directly related to programming efforts (such as updates to the program's website). Program staff may write portions of products or lead their development, provide guidance and feedback on products, co-present at conferences or on podcasts, or lead the outreach and follow-up with communication partners (more on that below). Consider engaging with communication specialists when possible to maximize the reach of your work.

Evaluator independence

As discussed in [chapter 1](#), ACF's Evaluation Policy highlights evaluator independence as an important principle in product development and communication. While the evaluation team includes program staff, ensure the subject matter expert in the evaluation has the final say about what findings are presented and how they are interpreted. Ensuring the evaluation experts play an independent role in communication adds credibility to your dissemination products.

Factor 3

Create strategic communication goals

Your plan should stem from your goals or reasons for distributing and sharing the findings of your evaluation. While most funders require a final report, you will likely have communication goals broader than funding compliance. For each goal consider how you can measure progress. Consider whether there are diagnostic metrics associated with each strategic goal, and develop a plan for how you will establish, analyze, and learn from them. Some examples of common communication goals follow:

- **Advance the field and improve programs and policies.** We have much to learn about how to improve program implementation and respond to implementation challenges. By sharing what you have learned in your evaluation, other organizations can benefit. Policymakers and decision-makers may take your recommendations into account when establishing laws, regulations, or program requirements.

- **Get attention from potential funders.** Reporting on the effectiveness of the program may signal to funders that your program should be continued, expanded, replicated, or scaled up. Your evaluation might also identify specific areas of improvement where future funding could help increase program reach or strength. Finally, your nonexperimental evaluation (e.g., an outcome evaluation without a comparison group) findings could indicate your program is ready to participate in an impact evaluation to generate causal evidence of the program's effectiveness.
- **Increase awareness.** Evaluation results tell your program's story. Your findings may include information about the demographic characteristics and reach of your program participant population, descriptions of program participant experiences, and positive changes associated with your program. Sharing this information can increase awareness of your program generally and build interest among your target population (Palen & Briggs, 2020).

Evidence review clearinghouses

Numerous fields, such as workforce development, home visiting, child welfare, and education, have large online clearinghouses that review evaluation evidence on how programs or interventions improve outcomes. Many of these clearinghouses provide opportunities for evaluators to submit their studies for inclusion when a program is reviewed. One communication goal might be to submit a clearinghouse-focused report or article for consideration.

Communicate throughout the life of an evaluation

Do not wait until your final report is complete to start sharing information about your evaluation. You have knowledge to contribute throughout all the steps in this guide:

- During planning, you can share your evaluation design decisions, instrument and measurement development, and strategies for including community representation on the evaluation team.
- During data collection, you can share interim findings and updates on effective study recruitment and retention strategies and ways you are monitoring the evaluation activities.

While the communication goals above are largely focused on the end state of your evaluation, you may also have interim goals tied to each step in your evaluation. For example, during your planning stages, you might share your evaluation design at an evaluators conference to solicit feedback and learn from other evaluation practitioners. Early communication can also help create awareness of and build demand for evaluation findings among the scientific and practitioner community. Later, you may present interim findings at a community town hall to solicit input and perspectives on how to interpret findings.

After you have structured your overall approach to communication—why, how much, and by whom—

you can develop each product and determine how to get that product to your intended audience. The next sections describe that process.

Develop Reports and Communication Products

Develop a plan for each report or product you create to share lessons from your evaluation. A plan will help ensure your product uses an effective format and approach for reaching the target audience. Product plans typically address the following components:

- **The audience.** What groups are you trying to communicate with? The more detailed your audience definition, the better you can tailor your writing to their information needs and motivations. While you might want to reach many audiences with a single product, designate primary and secondary audiences to keep your document focused and tailored.
- **The message.** What are you trying to say? What knowledge do you want to impart? What actions do you want your audience to take after engaging with your product?
- **The format.** What vehicle will you use to communicate with your audience? For example, will you write a report or record a podcast (see table 8.1)?
- **The channels.** How will you get your message to your audience? For example, will you post your report on your organization's website or distribute it through your evaluator's listserv? See [Communicate Results](#).

Audiences, formats, and messages all interact to help you determine the right combination. You might start with an audience such as grant funders and build your product out from there. Conversely, you might try out a new data visualization platform, then focus on what message the data can express, and the audience that should receive that message.

Table 8.1 describes a variety of product formats, the types of messages they typically communicate well, and the audiences that may best connect with them.

Table 8.1. Communication Product Formats, Messages, and Audiences

Format	Message Types	Audiences
Interim or final report	Interim or final summation of the evaluation; findings and interpretations	<ul style="list-style-type: none"> ■ Current and future funders ■ Evidence review clearinghouses ■ Project/organizational leadership ■ Researchers and evaluators
Executive summary	Top-level summary of evaluation findings	<ul style="list-style-type: none"> ■ Policymakers and decision-makers ■ Community leaders ■ General public ■ Other program managers
Journal article	Technical report focused on methodology, quality of evaluation, results, and contribution to the field	<ul style="list-style-type: none"> ■ Researchers and evaluators ■ Evidence review clearinghouses ■ Program developers ■ Policymakers
Research brief	Short but detailed report covering methodology, evaluation quality, and findings	<ul style="list-style-type: none"> ■ Current and future funders ■ Policymakers and decision-makers ■ Researchers and evaluators ■ Program developers
Nontechnical brief	Short report focused on findings, interpretations, and implications	<ul style="list-style-type: none"> ■ Other program managers ■ Community leaders ■ Community members ■ General public ■ The media

Table 8.1. Communication Product Formats, Messages, and Audiences (continued)

Format	Message Types	Audiences
Fact sheet	Short document presenting simple findings in visually appealing displays	<ul style="list-style-type: none"> Other program managers Community leaders Community members
Tip sheet	Short document describing actions and next steps based on interpretations of findings or lessons learned through implementation of the evaluation	<ul style="list-style-type: none"> Program developers Other program managers Current and future funders
Infographic, data visualization	Diagram, illustration, or other visual that presents information in an easy-to-understand way; can stand alone or be part of other formats	<ul style="list-style-type: none"> Other program managers Community leaders Community members General public The media
Press release	Short announcement about the evaluation set in local or current context	<ul style="list-style-type: none"> The media
Blogpost	Short, simple web-based content that provides easily digestible information, often with graphics and videos and links to longer products	<ul style="list-style-type: none"> Other program managers Community leaders General public
Social media post	Text-based or multimedia (image, graphic, video) content for sharing on social media platforms. Social media posts can both contain independently informative news, updates, and information and direct attention to other communication products	<ul style="list-style-type: none"> Community members Community leaders Researchers and evaluators General public The media Other program managers
Presentation	Virtual or in person, often guided by a slide deck and with time for audience interaction and feedback	<ul style="list-style-type: none"> Researchers and evaluators Other program managers Current and future funders
Video recording	Visual and audio reporting. Videos can be animated or interview based and can be used to put a human face to research and evaluation work and tell highly engaging, data-based stories	<ul style="list-style-type: none"> Community leaders Community members General public
Audio recording	Audio reporting that tells a data-based story in an interview or small group discussion format	<ul style="list-style-type: none"> Community leaders Community members General public

Source: CWCC [Child Welfare Community Collaborations] Evaluation TA Team (2021)

Social media posts and campaigns, and products like briefs and blog posts, can both contain novel evidence and insights and synthesize them across other products. They can also valuably direct attention to other products.

While the materials above are for external audiences, you may also develop reports about the evaluation for internal program use only. For example, you might develop yearly fidelity calculations or track program retention for program management or continuous quality improvement purposes. Such reports should focus on the data rather than the messages. They use the exact terminology program staff use and share other pertinent information such as the precise timeframe the data cover.

Write a final evaluation report

Most externally funded evaluations are required to develop a comprehensive final report. These reports usually have the funder as a primary audience and may have related documents that distill and translate the findings for more internal use by program staff. Your final report might be your evaluation's most important product because it can affect future funding decisions.

Many funders have specific requirements for your final report's content and the way it's organized. You must meet those expectations to ensure it complies and gives the funder access to your evaluation and its findings. Provide detailed information about the program, the evaluation design and methods, the data quality and your analytical approaches, your findings, and their interpretations and implications. This Guide provides final and interim evaluation report templates in [appendix B](#).

While you must first comply with funder requirements, other best practices for evaluation final evaluation reports follow:

- **Develop a separate executive summary.** This stand-alone two- to three-page document should provide a nontechnical description of the highlights of the evaluation's findings and implications and information about the program and its goals.
- **Place technical information in an appendix.** While you need to provide sufficient information for a reader to assess the quality of your evaluation, most of the audience does not need to read technical specifics. Information such as the model specifications or complex sampling plans should appear in the appendix and referenced in the body of the report. Those interested in that information can access it in a way that does not encumber the flow of the evaluation report.
- **Place instruments in an appendix.** A detail-oriented reader and members of the program's field appreciate you sharing your data collection instruments. Sharing instruments is also an act of transparency that enables your audience to review the exact measures you used to capture the evaluation's data.

Develop a report for an evidence review

If you have conducted an impact evaluation and want to submit it for an evidence review or ensure you have documented all relevant information, consider the following reporting guides produced by evidence clearinghouses:

- *Title IV-E Prevention Services Clearinghouse Reporting Guide for Study Authors* (Kerns et al., 2021)
- *Home Visiting Evidence of Effectiveness Reporting Guide for Authors* (OPRE, 2020)
- *WWC Reporting Guide for Study Authors* (IES [Institute for Educational Sciences], 2021)

- **Situate your evaluation in the field.** Put your evaluation in context; for example, by providing information about the program rationale and local conditions, rationale for your selection of outcomes, and findings from other evaluations of the same or similar program. Cite materials that provide this contextual information.
- **Provide information that enables readers to assess rigor and quality.** As described in [chapter 7](#), information such as sample size, attrition rates, and amount of missing data all indicate the rigor of your evaluation's findings. Evaluations based on lower quality data should be viewed as more speculative than those with higher quality data.
- **Organize your findings around your evaluation questions.** Well-constructed evaluation questions drive an evaluation from conceptualization to communication. Using these questions to structure your findings section is a good way to maintain consistency and guide your audience through your results.
- **Bring integrity to your reporting.** Many evaluations have unexpected or disappointing findings; however, evaluation reports are informative, not persuasive. Resist the urge to suppress or withhold any findings germane to your evaluation questions. This tension is one reason advance study registration is considered a scientific best practice and requested by many funders. Study registries document analysis plans, and high-profile evaluation reports are often compared with the plans.

Progress reports

Your funder may also require progress reports. These reports typically focus on programmatic updates but may also require updates on evaluation progress, or even interim findings to date. Make sure your evaluation team is prepared to provide information according to funder expectations.

Tips for effective writing

While the section above addressed development of your major final evaluation report, this section provides advice relevant to all products you may develop, including your final evaluation report.

Plain language guidelines

According to plainlanguage.gov, plain language (also called plain writing or plain English) is communication your audience can understand the first time they read or hear it. This website provides a variety of guides, checklists, and templates to help writers craft accessible and clear products.

can easily comprehend. Strategies to write well include writing concisely with shorter sentences and paragraphs, eliminating words that add no value, using the active voice, varying sentence length, and following plain language guidelines (see textbox).

- **Use simple language.** Flowery, complicated, and jargon-filled language is sometimes incorrectly seen as a sign of education and expertise in a topic. However, such language makes a document hard to understand and distracts from the message. If a writer understands their topic, they can write about it in simple terms the audience
- **Use inclusive language** so you center the evaluation on people rather than their characteristics or conditions (e.g., people in prison rather than incarcerated people). Assess the reading comprehension level of your writing. Most word processing software provide editor functions that assess a document's grade-level reading. While technical writing is acceptable at a 12th grade reading level, target 8th to 10th grade level writing for nontechnical pieces.

- **Write assuming your audience is busy.** One way to boost the chances your audience gets your message is to state your findings or argument several times—in the introduction, in the body of the product, and again in the conclusion. Use a consistent pattern within similar sections. For example, if you describe findings for each evaluation question, describe quantitative findings and then qualitative findings.
- **Remember your audience does not know what you know.** Pinker (2014) argues that most written materials invite confusion and frustration because the writers assume their audience has knowledge they do not. He recommends writers share copies of their drafts with members of their intended audience for feedback, and if time allows, set writing aside for a while, and return to read it with a critical mindset.
- **Be careful with comparative language.** As detailed more in the [Practice Culturally Competent and Equitable Evaluation section in chapter 7](#), think about what race/ethnicity, gender, and religion you center in your subgroup discussions. Why would you or would you not make White, male, Christian, heterosexual the reference category?
- **Follow a writing process.** Writing is a laborious, iterative practice. Use proven techniques to develop your products such as starting from an outline or storyboard, writing a draft and sharing it with others for feedback, and writing subsequent drafts. Seek professional or peer reviews and editing support.
- **Establish authorship.** Determine who gets credit as an author for each product. If more than one person is writing, identify the order people will be listed as authors. Authorship means the person made a significant contribution to the product and will vouch for the data analysis, findings, and veracity of the product. You might identify people who provided support such as reviewers in an acknowledgements section. Establish plans for organizational contributions. Which organizations' logos will appear on your products? How will you document program and evaluation funding?

Writing resources

Numerous tip sheets and guides can help support strong and effective writing and copy edit processes. Be sure to check out the links at the end of this chapter.

Ways to engage with your audience

In addition to the words you use in your products, the structure of your products can influence audience engagement. People are inundated with information. You need to invest in making it easy for them to engage in your materials:

- **Make your products visually appealing.** Use easy-to-read fonts, add pictures, and leave plenty of "white space." Avoid too much formatting, which results in a "busy" and uninviting appearance.
- **Make your products easy to navigate.** Use headers and subheaders. Provide agendas or roadmaps at the start of a presentation. Add page numbers. Use a table of contents if your document is longer than 20 pages. Use bold, bullets, and textboxes to separate and highlight main points.
- **Make your products consistent.** Use the same color for the same concept or outcome throughout the product. For example, if you provide data separately for people by race/ethnicity, make sure Latino and Black, for example, are the same color/shading in each visual. Show data in the same order across each visual.

- **Consider guiding titles for your visuals.** Rather than a bland descriptive title, such as “Changes in parenting attitudes over time for treatment and comparison groups,” try highlighting interesting findings: “Treatment group parents show larger improvements in parenting attitudes over time than comparison group parents.”
- **Use effective data visualizations.** Tables, graphs, charts, and infographics can help tell your story and engage your audience. Data science provides ample recommendations for how to make the best use of visuals and avoid common mistakes (recommendations at the end of this chapter). For a web-based product, consider building interactive data visualizations using products such as Tableau, so your audience can filter and manipulate your data to answer their questions and address their curiosity.
- **Provide practical implications and next steps** based on your findings, such as a textbox titled “Tips for Practitioners.”

Make your products accessible

Did you know that about a quarter of Americans have a disability? About 13 percent of American adults have difficulty hearing, while 6 percent of Americans aged 12 and over have difficulties seeing (Madans et al., 2021; NIH [National Institutes of Health], 2006). Make all your products accessible to as many people as possible. If the federal government funded your project or you intend to distribute it through federal channels, you may be required to make your products accessible.

The federal government defines accessibility adaptations according to Section 508 of the Rehabilitation Act of 1979. While you will need to obtain formal guidance to adopt all necessary accessibility procedures, the guidance falls into two main categories:

- Your document will need to be ready for reading by the software (e.g., JAWS) that individuals with visual impairments use. Supports are needed such as alternative text describing visuals, use of high-contrast colors, and correct structuring of tables, for example, so individuals with visual impairments can engage with the written or visual product.
- Provide supports such as closed captioning, so individuals with hearing impairments can engage in an oral or audio product.

See Information Gateway/CB (2020) and Office of the Chief Information Officer (2021) for more information.

Communicate Results

After you have developed a product, get it to your audience members. Some audiences are small and identifiable such as a group of eight program staff who need an internal data update report. Others are more diverse and not known by name or email, such as parents who live in the program's county.

Break down communication into two parts: how you will get your product to your audience and which partners can help you amplify your communication.

Table 8.2 shows common communication channels. You may distribute a product through multiple channels or use different versions of the same channel type to reach different audiences.

Table 8.2. Communication Channels

Communication Channel Type	Examples
Websites	<ul style="list-style-type: none"> ■ Program or program's organizational website ■ Evaluator's website ■ Local community websites, such as news sites or community bulletin boards ■ Information clearinghouses and databases ■ Program developers' websites ■ Online journals
Social and digital media	<ul style="list-style-type: none"> ■ Blogs ■ Social media ■ Newsletters, e-blasts, email marketing ■ Listservs and communities of practice ■ Podcasts ■ Online media
Events	<ul style="list-style-type: none"> ■ Government meetings ■ Conferences ■ Local, state, and regional organizational meetings ■ Webinars ■ Town halls
Print	<ul style="list-style-type: none"> ■ Flyers ■ Mailings ■ Newspapers ■ Journals

Some of these channels or options within a channel are better suited to some audiences and some products. For example, town halls may be an effective means of reaching community members, while webinars through a professional membership organization may be more effective at reaching similar program staff and providers. It is important to identify audience preferences and meet your audiences where they are.

Identify communication partners and influencers who can help amplify your communication through their own networks. For example, you might consider asking a national organization such as the National Head Start Association to retweet you or add language about your report to their newsletter to reach many more relevant audience members. Develop a list of trusted communication partners with the type of audience they can reach and the communication channels. Ensure their approach, philosophies, and reputation in the field are aligned with yours. Communication is inherently reciprocal: Offer to help amplify partner and audience messages when appropriate to do so.

Typical types of communication partners follow:

- Respected community members or individuals in your field who are interested in supporting and amplifying the evaluation
- Local or national organizations related to the topic or service population associated with your program
- Members of your formal or informal networks
- Professional media consultants

Your level of engagement with communication partners can be something as simple as tagging an organization in a tweet to a formal memorandum of agreement for cross-communication efforts.

Practice Culturally Competent and Equitable Evaluation When Sharing Lessons Learned

Potential audiences

- Community members who could be past or future participants
- Local government offices, community activists, school administrators, and other organizations who could influence program objectives

When you share findings with your program's communities, you can strengthen relationships among program staff and community members. Communicating findings will demonstrate transparency with data provided by the community and position them as valued program partners. Consider your potential audiences and what information would most interest them when deciding what to share.

In a CREE approach to program evaluation, communication strategies are co-created with communities so findings are relevant to local organizations and residents. Community members' insights on communication strategy decision points can help answer questions such as those listed here.

- Which findings are most relevant to community audiences?
 - ▶ Should you present or report findings across all program communities or just from this community?
 - ▶ Do comparisons across participant groups, such as which groups benefitted the most or least, help with decision-making?
- How can you present findings with the most clarity?
 - ▶ What insider language or jargon do you need to replace?
 - ▶ What do you need to do to ensure any tables, charts, photos, and quotes you share improve your communities' understanding?

Communicating with the community

The Tribal Early Childhood Research Center presented on their work at the annual OPRE Methods Meeting (Barnes-Najor et al., 2021). Their recommendations for CREE-aligned communication include thinking about a communication strategy throughout the project; sharing findings that contradict existing paradigms; paying attention to different audiences' information needs and concerns; and producing many nonacademic products to reach community members.

- Which communication channels would best reach each audience?
 - ▶ For example, a school board may prefer a presentation, while you may best reach parents through an email from their children's teachers.
 - ▶ If you are trying to communicate to young mothers through social media, which platforms (e.g., Facebook, Instagram) are the most popular, and what groups should you tag?
- Who should the spokesperson be for findings?
 - ▶ How do other factors, such as communication channels, influence who should deliver the message? For instance, social media posts might be best developed by community members, while presentations to the local transportation authority might be best delivered by community members and program staff.
- Can you use communication activities to collect community feedback?
 - ▶ Could community listening sessions share findings and collect information about future program needs?

Individuals and organizations who communicate do more than broadcast: they reciprocally inform, motivate, and learn. Including community voices in the communication of findings to other audiences should align with CREE. For instance, having evaluators and engaged program participants co-present at conferences can help make findings meaningful to the audience. When including community representatives and program participants in presentations and other forms of communication, representation should be more than token. The representatives should help decide what to present, know what each person is contributing, understand the audience and what types of questions might be likely, and have ample time to practice what they will say and learn about any technology that will be used.

To learn more ...

- [APA Style](#) (APA, 2022)
- [Dissemination Planning Tool](#) (AHRQ, 2005)
- [Equitable Research Communication Guidelines](#) (Gross, 2020)
- [Guidance Note on Developing an Evaluation Dissemination Strategy](#) (United Nations, 2009)
- [Plain Writing in One Page](#) (HHS.gov, 2015)
- [Six Tips for Making a Quality Report Appealing and Easy To Skim | Agency for Healthcare Research and Quality](#) (AHRQ, 2019)
- [The Copy Editing and Proofreading Checklist All Writers Need](#) (Klems, 2016)
- [The Value-Added Research Dissemination Framework](#) (Macoubrie & Harrison, 2013)
- [Three Ways to Expose Formatting Inconsistencies in a Word Document](#) (Harkins, 2016)
- [Disseminating Evaluation Results](#) (Palen & Briggs, 2020)
- [Tips for Effective Data Visualization](#) (Thatte, 2019)
- [U.S. Government Publishing Office Style Manual](#) (U.S. Government Publishing Office, 2016)

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