MARKET RESEARCH AND EVALUATION

2017 Reporting Guidelines

July 25, 2017

At NEEA, we are dedicated to providing strategic and relevant insight to our primary audiences through market research and evaluation (MRE). To ensure that MRE reports are easy to understand and clearly convey actionable take-aways, we have established a set of reporting guidelines for our partners. The intention of these guidelines is to clarify NEEA's expectations for consistent reporting and support our goal of working with our partners to generate the best possible information.

NEEA greatly appreciates the on-going efforts of its partners to deliver the highest-quality research and analysis. We understand that researchers have different styles and preferred methods for reporting and communication. These guidelines are meant as just that, and should not be considered prescriptive. However, we are requesting that our partners prioritize clarity and readability in their reports, and expect that these guidelines will help.

Thank you for your support in transforming the future of energy efficiency in the northwest.

Regards,

Corinne McCarthy

Corinne McCarthy
Sr. Manager, Market Research and Evaluation

Background

Market Research and Evaluation (MRE) reports are a vital and trusted source of information for NEEA personnel, funder and stakeholders. In fact, MRE reports are the most frequented part of NEEA's public website. In addition to being accurate and actionable, NEEA would like its partners to deliver reports that can be understood and used by a wide variety of audiences for maximum impact.

The audience for NEEA's reports is a variety of subject matter experts with a capacity to digest complex information. However, this audience also extremely busy with limited time for poorly communicated information. To that end, NEEA has created a set of guidelines to clarify its expectations regarding three key report writing elements:

Table of Contents:

Organization

NEEA will work with its MRE partners to establish reporting expectations at the beginning of all projects to ensure clarity and alignment. While not a requirement, this common format and flow is recommended:

Format

NEEA's MRE partners are free to use any tool of their choice to produce their reports, including: PowerPoint, Word, Adobe, etc. When deciding between tools, partners should choose the one that is best suited to deliver maximum readability and clarity given the material and subject matter. Regardless of format, every MRE report should include an Executive Summary (see below).

Report Flow

Cover Page:

Every MRE report should include a cover page. NEEA has created a template that MRE partners should use (see Appendices, pg. 11-12).

Table of Contents:

The table of contents should be no longer than a single page in length.

Executive Summary:

The Executive Summary should be concise – no more than two pages – and provide enough information for the reader to understand the scope of work and determine its relevancy. Specifically, the executive summary should contain:

- **Report Justification** - A brief summary of the business and research objectives and methodology; and,
- **Summary of Key Findings** - The three to five most important and relevant results of the research.

Detailed methodology, sampling procedures, raw data details, tables, and supporting data should not be included in the Executive Summary.

Background:

The background section of the report should contain more detailed information about the business and research objectives of the study, project design and approach, methodology, and sampling techniques.
If the background section is more than one or two pages in length, the author should consider revising it, or moving more detailed information to an appendix. In many cases, visualization techniques can be used in the background section, particularly when explaining methods, markets, and sample populations.

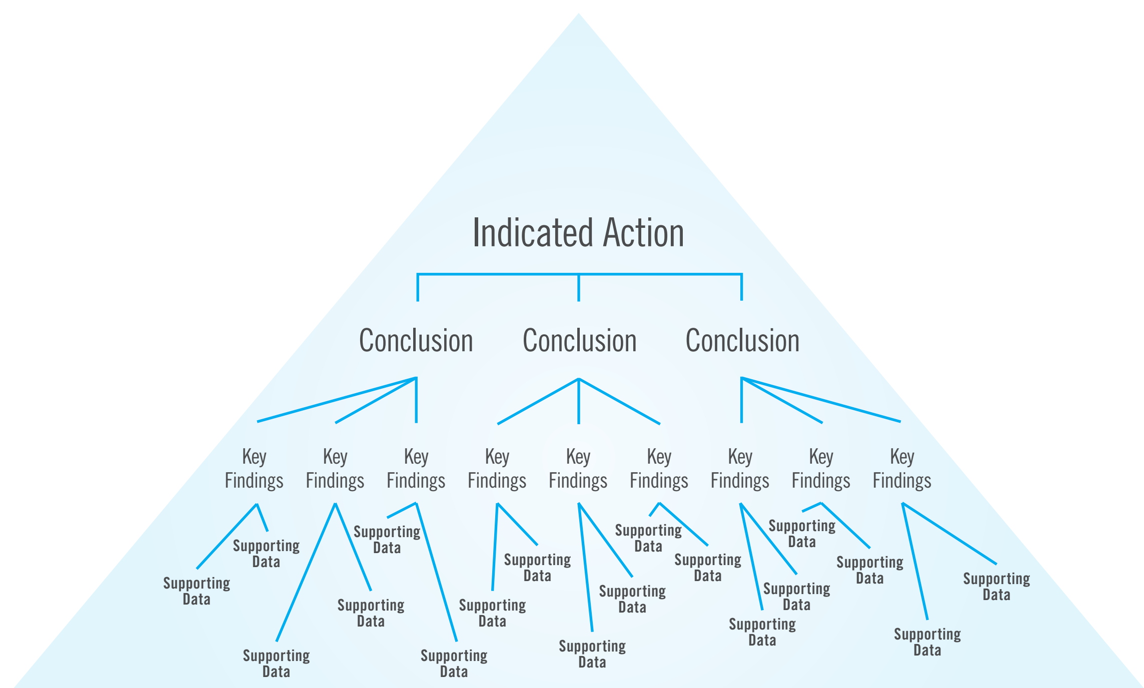
Organization (CONTINUED)

Report Flow (cont.)

Key Results

Only the most important research conclusions should be presented within the body of the report, supported by any rationalizing key findings. To better synthesize key results, insights and data should fall within one of three categories:

1. **Indicated Actions:** These are key actions or recommendations that can be taken based on trends discovered within the research. It is these overarching insights, supported by relevant conclusions, that should be more briefly described in the Executive Summary. A number of conclusions and key findings could support an indicated action.
2. **Conclusions:** Three-to-six conclusions that are deemed most important and used to develop an indicated action. These should be justified with key findings, but should not highlight any supporting data.
3. **Key Findings:** These insights should provide context and rationale for the research conclusions. Key findings should be supported by detailed data/information. When determining if supporting data belongs in the body of the report or an appendix, authors should ask themselves: Is this level of detail required to understand the finding? Will including this level of detail interrupt the flow of the report such that it becomes harder to decipher?



Organization (CONTINUED)

Report Flow (cont.)

Additional Findings

Sometimes within an in-depth study, insights will come forth that are less relevant or that will validate existing knowledge or conclusions drawn prior to research execution. It is important to include these findings within the report. However, unless they support a key conclusion or indicated action, they should not be included in the 'key results' section but instead captured in a section called "Additional Findings".

Appendix

The appendix is a tool to streamline and improve the readability of reports. All non-critical data and information should be placed in the appendix, making it easier for readers to both focus on key findings in the body of the report and dive deeper into the data as needed. The appendix should contain two types of information:

1. **Detailed data that was captured and synthesized to generate insights, conclusions, key findings and indicated actions, but is NOT critical for understanding.** This detailed information should be linked to the key finding in the report, making it easy for the reader to access while they are reading, or come back to at a later date. This type of information includes detailed tables, demographic information, graphics that explain the meaning of supporting data, etc.

2. **Information that is not germane to findings but needed for documentation that drove the research.** This type of information includes discussion guides, survey instruments, detailed sampling methodology, etc.

Because the appendix is likely to host many disparate types of information, organization is important. In some cases, the appendix will be large enough to require a table of contents - this is especially true if there are many tables. Depending on the size of the appendix, it may be useful to create links from the appendix table of contents to sections within the body of the appendix.

Visualization

'Data Visualization' is a general term that describes any effort to help readers understand the significance of data by placing it in a visual context. As outlined in the table below, visualization techniques tend to fall into three categories based on audience need: explore, explain and inform. The goal of most visualization techniques used in the body of MRE reports is to 'explain' conclusions and key findings. Visualization techniques used in appendices are typically used to 'explore' the data.

AUDIENCE GOAL	ACTIVITY	CONTEXT	VISUAL DIRECTION
ANALYZE Who: MRE, MI, Program Teams, Subject Matter Experts, Contractors, Regulators	***EXPLORE*** Goal: Synthesize detailed findings into conclusions; prioritize those conclusions; and hypothesize indicated actions.	Organize information based on analytic techniques within research objectives; demonstrate how data was analyzed to draw conclusions	Present information in a way that enables wider and deeper understanding of findings and their interrelationships.
ACTIVATION Who: MRE, Program Teams, Workgroups, Regulators, Other Interested Parties	***EXPLAIN*** Goal: Demonstrate what we learned; and how those learnings can impact decision making.	Organize information based on relevance to and impact on the business objective; highlight the connection between a variety of information sources that lead to conclusions	Present information so that: • Conclusions are succinct and easily understood. • Attention is drawn to the most important conclusions • The essence of key findings is captured and attributed to relevant conclusions. • Detailed data from which key findings were derived is accessible, but not central.
ADVANCEMENT Who: NEEA Directors, Funder Advisory Committees	***INFORM*** Goal: Summarize what we did, what we learned and why we are confident in our recommendations.	Organize information as though it is a story – set the context, define the conflict, and approach to resolution.	Organize conclusions and indicated actions in an engaging way that communicates a clear and compelling story.

Readability

Dealing with Prose:

Although much of what has been already outlined in this guide will improve readability of NEEA's reports, there are a number of tips and techniques contractors should consider using in text heavy portions of reports. These techniques support NEEA's goal of ensuring its reports are easily understood and support decision-making by the key audience.

- **Avoid run-on sentences and use the active voice.** Poorly punctuated sentences, or those written in passive voice, take longer to read and make it difficult to decipher key information.
- **Use bullets and lists to organize content and break-up blocks of text** - Bullets and lists grab attention, reduce word count and make the document more scannable.
- **Provide clear, informative titles.** Table and figure titles should concisely describe the purpose or contents of the table/figure and should draw the reader's attention to key findings. Ensure that column heads, axis labels, figure labels, etc, are clearly and appropriately labeled.
- **Use headlines to communicate findings and subheads to introduce topic changes.** Headlines and subheads should be specific and descriptive, using the minimum number of words necessary to draw readers into wanting to read the text that follows.
- **Use white space effectively** - Build white space into each page by providing enough inter-line spacing, or leading to make it easy for readers to scan and/or read each paragraph.
- **Use uppercase type with care** - Words set entirely in uppercase text are appropriate for titles and logos. However, headlines and subheads set entirely in capital letters slow readers down because they are harder to recognize.

Readability (CONTINUED)

- **Build contrast into each page** - Add typographic contrast by using headlines and subheads that are noticeably larger or darker than the type used for adjacent paragraphs. Headings and subheads should stand out from the paragraphs to guide the readers' eyes through your paragraphs, announcing upcoming topics and drawing attention to the most important information.

- **Avoid text wraps -** Avoid anything that interrupts readers' rhythmic, left-to-right eye jumps as they scan the report. Text wraps occur when a photograph or graphic is inserted within a text column, reducing the line lengths of the adjacent text. This forces readers to readjust to a different scanning rate, only to have to return to the original rhythm after the interruption.

- **Use 'wayfinders' to organize ideas** and to assist busy readers in finding key ideas. Wayfinders include, icons, bullets, call-out boxes, colored boxes, etc.

- **Include charts and graphs** created in PowerPoint, Illustrator, Tableau, etc. to leverage visualization. Charts and graphs generally fall into five categories: categorical, hierarchical, relational, temporal, and spatial. Chose the type of chart or graph that best communicates the key result or finding.

Standards

NEEA's MRE partners produce a large number of reports. It is important that these reports all have a consistent look and feel. To that end, we ask that contractors follow these general guidelines:

Fonts:

MRE partners can choose between Cambria, Calibri or Arial font for all written reports. Fonts should be used consistently throughout the report.

Body copy should be no smaller than 10 point font, although 11 or 12 point font is preferred. Generally, headlines should be four font sizes bigger than the body copy and the sub-headlines two sizes bigger than the body copy. Table/ figure titles and labels should be 9 or 10 point font.

Key Colors:

R: 38 G: 34 B: 98	*R: 140 G: 198 B: 70*	*R: 42 G: 169 B: 224*	*R: 243 G: 108 B: 33*	*R: 250 G: 188 B: 43*	*R: 70 G: 64 B: 138*	*R:127 G: 205 B: 232*	*R: 0 G: 131 B: 202*

Logos:

NEEA's logo should appear on the cover page of each report (see Appendices for templates). Partner logos can appear on the cover page of the report and/ or in the footer of Executive Summary report. Logos should not appear on every page.

Appendices

Report Cover Page:

Month, DD, YYYY

REPORT #E16-xxx

Report Name Here

Prepared For NEEA:
NEEA Staff Name/s, title

Prepared by:
Individual Name #1, title
Individual Name #2, title

Contractor Name
Contractor Address
Contractor Phone Number

Northwest Energy Efficiency Alliance
PHONE
503-688-5400
EMAIL
info@neea.org

Appendices (CONTINUED)

Cover Sheet for PowerPoint Reports:

neea

Prepared for NEEA:
Name, Title
Name, Title

Prepared by Company Name:
Author, Title
Author, Title
Address Line 1
Address Line 2
Phone

Report Name

Report Type
Report # 123456
Date