



# 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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