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Introduction

What if evaluation findings were not only understandable and useful to foundations and nonprofit organizations, but actually engendered a level of engagement and excitement that increased stakeholder interest in learning from the evaluation? In the case reported in this article, a utilitarian decision made by Lumina Foundation for Education and its third-party evaluation firm, SPEC Associates, to use memos as a reporting tool to meet real-time information needs of partners in a complex national policy change initiative unexpectedly revealed the power of the memo to promote continuous learning.

Key Points

- Real-time evaluation memos provide data-based feedback in a timely manner to inform decision making.
- Memos must be concise and include both data and expert synthesis and interpretation.
- The foundation must have a learning culture if the memos are to most useful; there must be time to reflect on the content and implications.
- The balance between data quality and timeliness must be managed and will be dependent on the topic.
- While useful for program management, these memos do not provide the kind of summative information that board members and other stakeholders may require.

Evaluation use has been a topic of debate and dialogue at least since the late 1960s (Kirkhart, 2000), and effective communication is frequently cited as an important element of use. For example, *The Program Evaluation Standards* (2011), recently updated by the Joint Committee on Standards for Educational Evaluation, includes a set of eight utility standards "intended to ensure that an evaluation will serve the information needs of intended users." Two of the utility standards are especially pertinent to this discussion. The first, Timely and Appropriate Communication and Reporting, calls for evaluations that attend to the continuing information needs of their multiple audiences. The second, Report Timeliness and Dissemination, says that significant interim findings and evaluation reports should be disseminated to intended users so that they can be used in a timely fashion.

The Center for the Study of Evaluation's Program Evaluation Kit includes a volume, *How to Communicate Evaluation Findings,* that provides practical tips for communicating evaluation information in ways likely to increase use at different stages of a program's development (Morris, Fitz-Gibbon, & Freeman, 1987). The book mentions the "efficient memo" as a possible accommodation for potential users whose attitude can be characterized as: "I don't want to go to a meeting that wastes my time." It also urges evaluators to submit reports in time to be useful for decision making.

In a comprehensive treatment of communicating and reporting evaluation results in ways that promote learning, Torres, Preskill, and Piontek

(2005, p. 72) devote several pages to the use of short communications including memos. "Brief, sometimes frequent communications about the evaluation are useful for reaching a wide range of individuals and groups," the authors indicate. "They can elicit responses to evaluation activities and findings, and help establish rapport."

Baxter and Braverman (2004) point out the need to tailor reports to focus on the questions and applications that interest their intended audiences. Many evaluation authors, they note, instead adopt the protocol of the research paper, in which only the technical aspects of a study are given thorough attention. They stress that a good communication plan should also take into account when particular findings are needed by the client.

After 24 months of experimentation and the production of 12 memos, SPEC and Lumina are ready to share insights and suggestions for optimum use of this tool.

Partners came to the table with deeply held convictions and differing views on solutions. Every idea that could possibly fit under the rubric of higher education reform was promoted by one stakeholder or another.

The Context: Lumina's Higher Education Productivity Initiative

To understand the complexities that led to the extensive use of real-time evaluation memos, it is necessary to understand the context of the initiative being evaluated. The mission of Lumina Foundation for Education, a student loan conversion foundation created in 2000, is to support access to and success in higher education. Lumina's early grant portfolio included a number of investments related to college-cost research, financial aid policy, etc. By 2008, student success in the form of dramatically increased U.S. postsecondary attainment rates became the overarching big goal at Lumina. In Lumina's most recent strategic plan (2009), increased productivity for the purpose of expanding the capacity of higher education and serving more students was affirmed as a critical outcome on the path to achieving the big goal.

A series of national reports (e.g., Blue Ribbon Commission on Higher Education, 2006, and the Secretary of Education's Commission on the Future of Higher Education, 2006) underscored the need for a change agenda that was not just about containing costs for students and families, but also one that situated cost challenges in the context of productivity — institutional costs and their relationship to outcomes for students — specifically, attainment, learning, and access. Lumina gathered a diverse group of interested parties from across the nation and set out to co-develop a plan to tackle these issues.

Lumina initiated grantmaking for productivity by funding a managing intermediary organization and a communications firm, several research projects, and a number of small grants to other national organizations that the foundation wanted to engage. Partner organizations included governmental and political organizations, educational associations, nonprofit research and policy organizations, regional higher education consortia, private sector representatives, and others. Fifty people attended one partner convening in early 2008.

Although Lumina had successfully used a multi-partner creation process with a previous initiative (Clayton, 2008), the approach proved ill suited for the productivity work. Unlike the other initiative, which focused on institutional practice, this one focused on policy change. Partners came to the table with deeply held convictions and differing views on solutions. Every idea that could possibly fit under the rubric of higher education reform was promoted by one stakeholder or another.

The "partnership among equals" model was not working. Nevertheless, Lumina entered a new phase of the work by announcing a program within the initiative under which states could apply for one-year productivity planning grants. Eleven of 38 states applying were selected for the grants and each of those ultimately submitted implementation proposals. Seven states received implementation grants in late 2009, and those states comprise the current cohort on which the evaluation focuses.

In early 2008, after state applications were invited but before the planning grantees were chosen, Lumina appointed a new chief executive officer. The CEO began to assert the foundation's leadership by tightening the scope of the initiative, such as giving notice that it would focus on reducing unit costs in public higher education, that it would not address K-12, and that it would not focus on change at the institutional level. While many partners welcomed the new focus and clarity, many others, including some of the state planning grant candidates, were disappointed that their preferred ideas would no longer receive consideration for funding.

Also in early 2008, Lumina's evaluation director convinced the initiative's internal program staff leaders that a good external "process evaluation" was needed to help diagnose and recommend solutions to the initiative's functional and structural challenges. Lumina entered into a contract with SPEC, a firm with a small staff but one that could operate nimbly and flexibly because it had an international network of independent consultants to pull in as needed.

In late 2008, making a decision that was directly influenced by evaluation findings as conveyed in memos, Lumina funded a new managing intermediary organization. The new intermediary subsequently formed a cadre of advisors and mentors to work with the funded states. The intermediary also subcontracted with an organization to develop and manage a web-based information sharing platform for the initiative, and formed a small advisory group which evolved into an expanded group of "thought partners." SPEC's evaluation team leader was tapped to be a member of the thought partner group.

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It was within this multi-organization, multiyear initiative that the real-time evaluation memo was conceived and used.

Genesis of the Real-Time Evaluation Memo

While most of the right pieces of the puzzle may have been on the table when the evaluators were hired, the initiative lacked a cohesive structure for communications and decision making. Real-time evaluation memos were first conceived as a tool to help Lumina think through the initiative's restructuring and subsequent decision-making processes in digestible chunks of information in rapid-cycle fashion.

SPEC's evaluation leader began her triage efforts by meeting with Lumina's internal team. As she listened to the issues and probed for insights, she recognized the need to assemble an evaluation team that brought a variety of talents – seasoned program evaluators who specialized in different areas. She quickly recognized that this evaluation would not fit neatly into a framework of process (as Lumina had initially framed it), formative, or any other common model. After she looked about for other ideas, it seemed that the closest fit, though not meeting all of the suggested criteria, was Patton's (2006) developmental evaluation framework. The evaluation design that emerged focused on:

- continuous engagement of the evaluators with the foundation and initiative partners (the program team leader at Lumina dubbed it "following us around");
- generation of evaluation questions and data collection activities calibrated to real-time decision points; and
- capturing and condensing findings in a way that could be easily assimilated and used as a basis for dialogue and discussion.

The memos became a beginning point for conversations and decision making, at first among Lumina staff but later with the initiative's national partners.

The idea for using memos as an ongoing reporting mechanism emerged from circumstance. Not only did the productivity initiative operate in a complex network of people and organizations, but also changes took place simultaneously on many fronts with breathtaking speed. Memos made sense because at any given time, the evaluation team could focus on questions of timely interest to Lumina and/or the partners, gather the data needed to address the questions, and frame the findings in succinct fashion. The memos became a beginning point for conversations and decision making, at first among Lumina staff but later with the initiative's national partners. A telling moment for the value placed on the memos occurred when partners requested that they be posted for all to see and make comment via the initiative's collaborative web platform.

The memos were useful for Lumina program staff in objectifying their feedback to national partners; that is, feedback was grounded in data and therefore reflected more than each staff member's individual opinions about how things were going. The memos became so useful to program staff that they began to ask when they would receive the next one!

The memos were not merely an interim report of evaluation findings. During these highly emergent phases of the initiative, there was no prestructured evaluation design to follow and report on. Final decisions about what questions to pursue and what data to gather were made collaboratively by the SPEC lead and the Lumina evaluation director, but suggestions began to come with increasing frequency from conversations among foundation staff and the partners. The memos prompted the foundation staff and its partners to pause and reflect on how the initiative was unfolding. They created a stir at times because various staff or partners wholeheartedly disagreed with some of the findings or interpretations of the findings, yet they served the purpose of stimulating discussions and broadening perspectives, and led to more informed decisions. There was something about the memos, the evaluation design, and the context within which they were used that resulted in great anticipation among Lumina staff and initiative partners for the next memo.

Characteristics and Purposes of an Effective Real-Time Evaluation Memo

In our own critical reflection about how and why these memos engaged and excited Lumina staff and partners about the use of evaluation, several distinct characteristics of an effective real-time evaluation memo have emerged:

- They provide fresh data at a point in time when critical decisions must be made.
- They have the right balance of brevity and evidence-based reporting.
- They push current thinking about the topic at hand.
- They are consciously used as a basis for reflection and are, therefore, only useful within foundations that are committed to learning.

The real-time evaluation memos for the Lumina initiative were backed up by rich, solid evidence from a variety of data sources. The memos drew on the specialty knowledge of evaluation team members to frame the evidence and weave in models and concepts from state-of-the-art literature on topics such as policy change, systems thinking, assumption-based planning, and interorganizational collaboration. The combination of defensible evidence plus subject-matter expert knowledge enabled the evaluation memos to push the boundaries of Lumina's thinking.

In the course of the evaluation to date, the memos served different purposes and met different needs as the work itself entered different stages. In the early stages, the memos helped the lead partners sort out relationships and roles. Later, the memos helped the lead partners plan and assess specific events and products. Recently, the memos have become more focused on what is being learned about Lumina's productivity work as a whole.

Relationships and roles. The initial memos provided food for thought when deciding who should be invited to the table, how the initiative should be framed, and what the relationships should be among partners. The data for these early memos came from preliminary meetings of the lead evaluator with Lumina staff, formal interviews with Lumina staff and the managing partner organization, observation of meetings between Lumina staff and grantees, review of historical documentation, and observations of national meetings.

Events and products. In the second stage, information needs shifted and the memos became focused on specific events and products, including national convenings of prospective grantees, the grant applications from the states, a retreat among the national partners, the first national conference of the states that received planning grants, and the RFP for implementation grants. These topical memos were used in conversations between Lumina staff and the national partners responsible for managing and supporting the initiative. The data for these memos came from the evaluation team's observations and informal interviews during the national convenings, participation in a national partner retreat, debriefing meetings with Lumina's evaluation director, an online survey of national partners, and a thorough analysis of the states' letters of interest, national meeting materials, and other relevant documentation.

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Learning from the initiative. In the latest stage, starting about nine months into the evaluation work, memos began to focus on capturing what was being learned through the initiative, offering insights from analysis of the state grant applications, and reporting on changes that the evaluation team noticed in the initiative. The memos were used as input into the partners' decision making regarding which were the key pieces of work within each state's planning grant application, and as a basis for an evaluation reflection meeting that the evaluators facilitated with Lumina staff and national partners. Data for these memos came from the planning grant applications, observations of various meetings and teleconferences among stakeholders, ongoing collection of initiative-related documentation, the evaluation team's own study of higher education policy and data environment in each of the planning grant states, and prior evaluation memos.

Tips for Constructing Memos

Early memos and event-specific memos tended to be shorter (fewer than 10 pages). Memos that synthesized data to identify themes or lessons learned tended to be longer, but none exceeded 20 pages. The time between memos was one to three months.

No two memos produced for the productivity evaluation looked exactly alike. However, the evaluation team developed a few conventions that may help others wanting to try the memo reporting form. A prototypical memo would look something like the following (with italicized items

Every memo was used, meaning every memo was read and discussed at a minimum by the Lumina staff team, usually the national partners as well, and sometimes by others, such as Lumina's executive staff, members of the state advisor and mentor cadre, and state team members.

optional depending on the context):

- On evaluator letterhead, memo header with TO (audience, which can vary), FROM, DATE, RE (subject – descriptive title);
- Evaluation question(s) being addressed and why (numbered) – half page or less;
- Data sources (bulleted or numbered) – half page or less;
- *Themes or topics addressed (numbered, with page references for longer memos);*
- *Key to patterns for longer or more complex memos, such as "Each section is divided into 'What' (how situation has changed) and 'So What' (assessment of implications)…";*
- Substance of the report, using ample white space, short paragraphs, prominent and frequent headings and subheadings, bolded or bulleted main points, occasional embedded simple tables or graphics;
- Summary observations with reflective questions;
- *Appended endnotes or attachments (if critical to the content, no more than two pages);* and
- Footer that includes Evaluator/Client, Memo No., Date, Title (repeat subject line), Page No., Total no. of pages

Wins and Losses With the Real-Time Memo

Table 1 presents a summary of the evaluation memo topics addressed to date by the evaluation team, the context (major foundation activities) that triggered each memo, how the memos were used, and what actions or decisions ensued if any. Every memo was used, meaning every memo was read and discussed at a minimum by the Lumina staff team, usually the national partners as well, and sometimes by others, such as Lumina's executive staff, members of the state advisor and mentor cadre, and state team members. However, memos differed in the level of attention they received and the extent to which specific findings or recommendations led to action.

A memo that arose from broad staff and partner interest in "story telling" was discussed in several different venues and resonated with many different stakeholders. The memo differentiated between stories for which there is a strong evidence base and stories that are hunches, stressed the importance of labeling stories honestly, and suggested standards of evidence to differentiate stories.

In contrast, a memo that suggested a variety of theoretical models for making sense of the initiative did not gain traction, primarily because the staff team did not grasp how it might apply the multiple models.

Some memos had clear impact. Among the actions or decisions made following consideration of a memo's findings were:

- a restructuring of the initiative that included a reduction of the number of organizations playing a direct role in initiative management, redefinition of some partner roles, and selection of a new managing intermediary;
- refinement of shared definitions and messages about productivity among partners, state advisors, and state teams; and
- adoption of clear instructions and criteria for implementation grant applications, including metrics that states would be required to track and a proposal scoring rubric that was shared with applicants.

A few memos had a delayed or even a "reverse" impact. For example, the evaluation team pressed the Lumina staff repeatedly on boundary issues, such as what was “in” or “out” of the initiative, highlighting issues that were important to some states but not considered allowable grant activities. Staff held its ground on several issues (“the initiative does not address K-12 reform”), but eventually began to change its attitude on others (“the initiative is only about state policy, not institutional practice”).

Real-time memos, then, are not magic bullets. However, the Lumina initiative evaluation showed that when prepared thoughtfully, backed by good data, and used as a jumping-off point for candid discussion, they often inform thinking and frequently influence decisions.

Pitfalls in Using Real-Time Evaluation Memos

The real-time evaluation memo offers promise for this new age of rapid-cycle strategic planning and initiative implementation in foundations. This type of evaluation reporting could be very valuable for assessing grant programs in areas such as emergency assistance and policy change, both of which must be ready to turn on a dime as new and unexpected events unfold. There are pitfalls, however, that foundations should be aware of before committing to this type of rapid feedback reporting:

Planning. Real-time evaluation memos challenge the evaluation field’s common planning methods. Memos must “grasp the moment” and produce relevant findings and insights when decisions need to be made. This means that the evaluation plan that uses this type of memo provides that information will be collected about “something,” and then a report will be written in the form of a memo whenever there happen to be findings and insights to share at just the right but unpredictable time! This context makes it difficult to write a work plan and to draw up an evaluation contract. It makes the delineation of contract deliverables difficult for the foundation. It is also difficult for the evaluator who must figure out how to meet the foundation’s expectations when those expectations are undefined. Our solution has been to promise a memo every three to four months and to discuss beforehand a list of likely topics based on the upcoming timeline of events, with a proviso that the timing and topics may be changed by mutual consent.

Budgeting. Producing effective real-time evaluation memos is labor intensive and therefore expensive. Providing evidence-based insights that push the foundation staff’s thinking requires the use of subject matter experts. The evaluation team must be intimately familiar with the initiative’s issues, which means considerable time of the subject-matter experts following the initiative around, both literally by attending major meetings and conference calls, and figuratively through reading volumes of documentation that major initiatives can produce. Creating a real-time evaluation memo that involves the insights of several subject-matter experts requires the joint analysis and interpretation of large amounts of data. It also requires extensive time of the memo writer, who must circulate preliminary drafts to the team and then make extensive rewrites that synthesize the diverse perspectives of experts from several different fields of study.

Developing real-time evaluation memos produces a tension between the desire for rigorous and thorough collection and analysis of data and having less-than-best data at the right time for decision making.

Capacity. Having an evaluator with the capacity to deliver is critical to the success of real-time evaluation memos. Not only must the evaluation team have the content expertise in the specific grant topic area, members must also be fluent in the current thinking on issues tangentially related to the topic, but critically related to the initiative. In the Lumina productivity evaluation, for example, higher education policy and research were not the only areas of expertise represented on the evaluation team. Other areas of team member expertise that proved helpful were work

TABLE 1 Summary of Evaluation Memos and Use by Foundation

Time Period	Major Foundation Activities	Memo Topic	Memo Use
March - April 2008	Foundation tries to settle on strategic directions for the initiative with 50 partners representing national organizations with an interest in higher education.	Memo identifies core controversies among existing national partners and perspectives not at the table.	Initiative staff discusses memo; helpful in clarifying issues and options; not yet moved to specific action.
May 2008	Foundation selects 11 states to receive planning grants and prepares for a national meeting of grantees.	Memo presents critical issues to think about prior to national meeting, such as likely differences among participants in defining productivity.	Initiative staff discusses memo at team meeting and agrees with many recommendations, but external managing partner is responsible for national meeting.
June 2008	Foundation and external managing partner hold first national meeting of grantees.	Memo provides highly critical feedback about what participants seemed to learn and missed opportunities for learning.	Initiative staff discusses memo at team meeting and shares with managing partner. Helped solidify staff resolve to reorganize and restructure the initiative. Suggestions for how to improve the meeting were used in planning future grantee convenings.
July 2008	Foundation streamlines partnership, reducing leadership group to five partners who are critical in rolling out the initiative.	Memo summarizes major themes present among the work of the 11 state grants and raises evaluative questions about each of them.	Initiative staff discusses the memo's reflection questions at team meeting, which forces thoughtful conversations especially related to recognizing what is not a priority in the initiative, as well as management issues.
August - Sept. 2008	Foundation holds staff retreat about the initiative.	Memo lists assumptions that have been uncovered about the initiative and introduces various theoretical models for framing the work.	The memo is circulated to the initiative staff. Solidified staff commitment to focus on state policy instead of institutional practice.
Sept. 2008	Foundation managing partner asks other partners to identify important pieces of work in each of the 11 planning grants.	Memo presents criteria for selecting key pieces of work, identifies important work, and aligns the selected work with theoretical models of public policy change.	Initiative staff reviews memo, finds the theoretical models interesting but difficult to figure out how to apply. Managing partner takes recommendations into consideration for identifying priority work in the states.
October - Dec. 2008	Planning grant work is designated as a "learning year" and new managing partner is assigned.	Memo presents evaluation team's perspective on elements of learning for purpose of evaluating what is learned during the "learning year."	Memo is used to guide conference call between initiative staff and evaluation team; led to scheduling evaluator-facilitated meeting with both intitiative and executive staff to develop shared understanding of what Foundation wants to learn.

TABLE 1 Continued

Time Period	Major Foundation Activities	Memo Topic	Memo Use
January - March 2009	Foundation holds evaluation planning meeting with evaluation team and reflection meeting with national partners.	Memo summarizes and assesses what has been learned about the productivity work over the past nine months.	Memo is used to guide reflective session with foundation and its national partners. Stirs debate about its accuracy and engages partners in discussion of important issues. Leads to refining definitions and core concepts/messages for the work.
April 2009	Foundation begins to prepare RFP for awarding implementation grants to subset of the planning grant states.	Memo uses stakeholder feedback to suggest changes in draft RFP; recommends that each state contract with in-state evaluators to assess their own work.	Many suggestions in the memo were incorporated into the RFP; for example, comprehensive scoring criteria were made available to applicants.
May - June 2009	Foundation holds second national meeting of the 11 planning grant states.	Memo provides feedback from interviews conducted during the meeting about ways the foundation and managing partner can support states in preparing grant application and afterwards.	Many ideas for supporting states in their productivity work were adopted.
July - August 2009	Foundation gets request from outside organization that has been asked by Congress about how to establish a competitive multistate initiative.	Memo presents highlights from prior memos in response to request from Lumina about lessons learned.	Foundation includes memo along with other materials to assist the outside organization.
Sept. 2009 - March 2010	Foundation and managing partner select seven implementation states, hold meeting with national partners about launching the implementation work.	Memo discusses importance of distinguishing stories about productivity work that are evidence-based versus those that are mostly hunches about what works.	Memo promotes broadest discussion to date, shared at iniative team meeting, at national meeting of partners, and at lunch-and-learn meeting of foundation staff. Idea of promoting standards of evidence and differentiating/labeling stories hit home, but not yet known how it will affect behavior.

force development; systems models; theories of learning; communities of practice; and the transferability, scalability, and sustainability of social innovations. Having an effective evaluation team leader who knows evaluation, is a good communicator both verbally and in writing, and who has the skills to negotiate differences of opinion among subject-matter experts is also critical. A third critical team characteristic for this way of working is flexibility. The team must be able to contribute large amounts of time to data synthesis, analysis, and interpretation according to a relatively unknown schedule. Finally, the team must be willing to deliver both good and bad news, and be able to inspire and cajole foundation staff into thinking in new ways.

Methodology. Developing real-time evaluation memos produces a tension between the desire for rigorous and thorough collection and analysis of data and having less-than-best data at the right time for decision making. Negotiating the tension is a delicate balance. Both the foundation staff and the evaluators must agree on the tradeoffs between delivering a memo with rigorous data and a complete reporting of both methodology and findings versus presenting results at the right time with limited data in a way that nonevaluators can understand. There is no formula for striking the right balance between presenting insightful and thought-provoking information and simultaneously assuring the reader that the memo is based on defensible evidence. In the productivity evaluation, striking this balance was an intuitive decision made independently for each memo.

The data collected and analyzed for the memos, alone, will not deliver summative information that is sometimes of utmost interest to boards.

Foundation support. Evaluation memos are likely to be most effective when there is a champion for them within the foundation. A major contribution to a real-time evaluation memo's effectiveness is having an inside track to the major decisions being made within the foundation. This foundation insider must be sensitive to how and when the evaluation memo can best contribute to the key decisions that need to be made. The timeliness of the memo depends on regular communications between the evaluation insider and the external evaluation team leader. The evaluation insider champions the real-time memo by making sure it is put on the right table, with the right staff, at the right time. In the case of the Lumina initiative, the director of evaluation played the role of real-time evaluation memo champion within the foundation.

Board expectations. A final pitfall in the decision to use real-time evaluation memos is that they are not likely to satisfy the information needs of the foundation's board of trustees. The memos are focused on guiding the initiative as it moves toward anticipated outcomes. The data collected and analyzed for the memos, alone, will not deliver summative information that is sometimes of utmost interest to boards. It may be a difficult "sell" to convince outcome-oriented trustees that the expense involved in producing real-time evaluation memos is money well spent.

It is likely that an evaluation that produces real-time memos will shift at some point into a more traditional design as the initiative stabilizes and better defines its theory of change, performance metrics, and desired impact. In fact, that has already begun to happen in the productivity initiative. The nature and role of the memo may shift in purpose accordingly – or may prove less useful as a tool. The Lumina productivity work is funded through 2012 and therefore will provide further opportunity to hone and test the memo as an evaluation tool.

Conclusions

The real-time evaluation memo has been an important tool in the design and implementation of Lumina's productivity initiative. The timely and insightful nature of the feedback grew to be highly valued at the foundation and engaged people in an unusually intense way. It created enthusiasm for the learning aspects of the initiative, rapport among staff and partners including the evaluation team, and great satisfaction that Lumina is moving purposefully and thoughtfully toward achieving its vision of success. Other initiative partners have begun to provide feedback on their study results in the form of memos, attesting to the perceived value of the tool.

Real-time evaluation memos are not the mainstay of typical evaluations. Perhaps they should be. Real-time evaluation memos bring the field of program evaluation much closer to the field of organizational development and away from the arena of social science research. If the demand for real-time evaluation memos increases, it will necessitate professional development for evaluators who are more comfortable designing a solid evaluation plan and delivering a final evaluation report.

In evaluations that involve real-time memos, relationship is mantra number one. For this kind of reporting to be effective, there must be open and honest relationships with and among the foundation staff as they listen to the memo findings, among the evaluation team as they make sense of the data, between the foundation staff and the national partners about whom the memos are sometimes written, and, most importantly, between the foundation evaluation champion and the evaluation team leader. There is no room for egos if real-time evaluation memos are to be maximally effective.

The process and product of real-time evaluation memos represent utilization-focused evaluation at its best. They not only present information that people value and want, it presents the information at just the right time for important decision making and within a context of critical reflection.

Real-time evaluation memos used effectively within foundations catalyze reflection. They provide data and space for staff to think about the foundation's own practice, even if they disagree with a memo's content. Real-time evaluation memos represent a way to build the capacity of people to think evaluatively and critically. While the memos do not, in themselves, create a reflective culture within the organization, they do force certain pauses within which critical reflection can occur. Perhaps if enough of these pauses occur, a tipping point in transforming a foundation's culture into one that highly values learning could result.

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