Understanding and Utilizing Evaluative Thinking

An Approach for Evaluators, Funders and NGO Providers

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Evaluation Capacity Building - Israel

From July through October, 2014, Bruner Foundation consultant Anita Baker worked together with evaluation consultant Gila Melech, Tel Aviv, to develop and share Evaluation Capacity Building strategies including:

- Translation of Bruner Foundation Evaluation Manuals and Grantmaker Presentations (jointly supported by the Bruner Foundation and the Rothschild Caesarea Foundation).

- Development of a conference presentation and training materials for Israeli Evaluators, Funders and NGO professionals.

The planning work culminated in a week-long series of on-site meetings and training sessions (see following) and plans for ongoing follow-up and collaboration. This presentation highlights information presented to and feedback from NGO participants (see end).
Evaluation Capacity Building - Israel  
On-site Agenda, 10/20 - 10/23/2014

<table>
<thead>
<tr>
<th>Day</th>
<th>Monday 10.20</th>
<th>Tuesday 10.21</th>
<th>Wednesday 10.22</th>
<th>Thursday 10.23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Morning</td>
<td>Arrive – 7:00 AM</td>
<td>Behaaracha Raba Conference Presentation: Evaluative Thinking</td>
<td>Enosh 9:00 – 1:00  12 people</td>
<td>Workshop for NGO's with Midot 9 – 12:30, 35 people</td>
</tr>
<tr>
<td>Afternoon</td>
<td>Meet with G. Melech, Israel Visit organizer final Planning, ECB</td>
<td>BREAK</td>
<td>Matan 3 – 6 5 people)</td>
<td>Reflections on ECB with professionals 3:30 – 7:00</td>
</tr>
<tr>
<td>Evening</td>
<td>Meet with Forum of Foundations Reps</td>
<td>Dinner with Visit organizer, Enosh Exec. Director</td>
<td>** Depart</td>
<td></td>
</tr>
</tbody>
</table>

Following are the presentation materials shared with participants at the Behaaracha Raba Conference.
Working Definition of Program Evaluation

The practice of evaluation involves thoughtful, systematic collection and analysis of information about the activities, characteristics, and outcomes of programs, for use by specific people, to reduce uncertainties, improve effectiveness, and make decisions.  

(Adapted from M. Patton, 1982)
Evaluation Capacity

The ability to do evaluation.

Involves proficiency in:
1. asking questions
2. determining data required to answer questions
3. collecting data using appropriate strategies
4. analyzing collected data and summarizing findings
5. using and sharing findings
Evaluative Thinking is a type of reflective practice that uses the five key evaluation skills in areas other than programs or initiatives.
What Are Key Components of Evaluative Thinking?

1. Asking questions of substance
2. Determining data needed to address questions
3. Gathering appropriate data in systematic ways
4. Analyzing data and sharing results
5. Developing strategies to act on findings
Evaluative Capacity

The combination of evaluation skills and evaluative thinking.

**Evaluative Capacity** requires a commitment to doing and using evaluation in programs, strategies, and initiatives *as well as a commitment to using those same skills in other aspects of organization work.*
Key Tenet of Bruner Foundation Investments

Evaluation capacity used well, supports programs, strategies, and initiatives that in turn lead organizations to better deliver on their missions and better meet the needs of those they serve.

The Bruner Foundation has invested in Evaluation Capacity Building (ECB) for more than 20 years.
Using the Bruner Foundation Evaluative Thinking Assessment Tool

• Created in 2005 to assess the extent to which evaluative thinking is present in various organizational capacity areas.

• Grew out of the Bruner Foundation’s Evaluative Thinking in Organizations Study (ETHOS).

• Automated in 2007 and updated in 2010-11 after additional study.
What Organizational Capacity Areas Does the Bruner Foundation Evaluative Thinking Tool Address?

- Mission
- Strategic Planning
- Governance
- Finance
- Leadership
- Fund Development
- Evaluation
- Client Relationships
- Program Development
- Communication & Marketing
- Technology Acquisition & Training
- Staff Development
- Human Resources
- Alliances/Collaborations
- Business Development
<table>
<thead>
<tr>
<th>ORGANIZATION MISSION</th>
<th>Assessment</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. The mission statement is specific enough to provide a basis for developing goals and objectives</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>b. The mission is reviewed and revised on a scheduled basis (e.g. annually) with input from key stakeholders as appropriate</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>c. The organization regularly assesses compatibility between programs and mission</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>d. The organization acts on the findings of compatibility assessments (in other words, if a program is not compatible with the mission, it is changed or discontinued)</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Comments:

Please proceed to the next Worksheet

1. This is a high priority
2. This is a lower priority
3. This is not a priority at all

Agree, Enter 1
Disagree, Enter 0
Don’t know, leave it blank
Example of Evaluative Thinking Indicators: Evaluation Organizations That Use Evaluative Thinking . . .

- Share results of program evaluations with leaders, staff, clients, board members and funders as appropriate.
- Use results of program evaluation to drive continuous improvement of programs.
- Insure that there are key staff with evaluation expertise and that there are staff members whose jobs or components of whose jobs are dedicated to evaluation.
- Provide or obtain current, well-delivered training in evaluation for program staff members.
- Provide training for enough staff members to insure that evaluation use is standard practice.
# Evaluative Thinking Assessment Tool

## Summary Report, by Capacity Area

<table>
<thead>
<tr>
<th>Organizational Capacity Area</th>
<th>Capacity Score*</th>
<th>Action Planning**</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Mission</td>
<td>100</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>2 Strategic Planning</td>
<td>40</td>
<td>Action required see priorities</td>
</tr>
<tr>
<td>3 Governance</td>
<td>50</td>
<td>Action suggested see priorities</td>
</tr>
<tr>
<td>4 Finance</td>
<td>91</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>5 Leadership</td>
<td>40</td>
<td>Action required see priorities</td>
</tr>
<tr>
<td>6 Fund Development/Fund Raising</td>
<td>25</td>
<td>Action required see priorities</td>
</tr>
<tr>
<td>7 Evaluation</td>
<td>30</td>
<td>Action required see priorities</td>
</tr>
<tr>
<td>8 Program Development</td>
<td>100</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>9 Client Relationships</td>
<td>67</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>10 Communication and Marketing</td>
<td>100</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>11 Technology Acquisition and Planning</td>
<td>67</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>12 Staff Development</td>
<td>100</td>
<td>No action required in this area</td>
</tr>
<tr>
<td>13 Human Resources</td>
<td>57</td>
<td>Action suggested see priorities</td>
</tr>
<tr>
<td>14 Business Venture Development</td>
<td>50</td>
<td>Action suggested see priorities</td>
</tr>
<tr>
<td>15 Alliances and Collaboration</td>
<td>0</td>
<td>Action required see priorities</td>
</tr>
</tbody>
</table>
Evaluative Thinking Assessment Tool
Summary Report Score Chart

Evaluative Thinking Scores

- Alliances and Collaboration
- Business Venture Development
- Human Resources
- Staff Development
- Technology Acquisition and Planning
- Communication and Marketing
- Client Relationships
- Program Development
- Evaluation
- Fund Development/Fund Raising
- Leadership
- Finance
- Governance
- Strategic Planning
- Mission

Scores range from 0 to 100.
Evaluation Capacity Building Strategies

- Basic evaluation training
- Advanced evaluation training
- Applied learning
- Coaching and T.A.
- Networking – peer learning
- Alumni study groups
- Anchoring
- Funding collaboratives/shared governance
## ECB Trainees Use What They Learn

### Percent Who Think Participating in ECB Helped Their Organizations . . .

<table>
<thead>
<tr>
<th></th>
<th>Some</th>
<th>A lot</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do better evaluations of programs</td>
<td>42%</td>
<td>57%</td>
<td>99%</td>
</tr>
<tr>
<td>Use evaluative thinking skills in multiple aspects of work</td>
<td>43%</td>
<td>52%</td>
<td>95%</td>
</tr>
<tr>
<td>Commission better evaluation</td>
<td>43%</td>
<td>49%</td>
<td>92%</td>
</tr>
</tbody>
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Bruner Foundation
Rochester, New York

Anita M. Baker, Evaluation Services
Clarification from the Field

I think we are using an evaluative mind to determine direction of the Agency. We continuously ask questions now: What is the information we need? How do we get the information? What is the best method to use? What is the time frame to implement? When can data be available?. . . As Executive Director, I now have a team of "evaluative minds" to strategically look at areas to improve, develop, and prepare for organizational or funding opportunities.
Evaluative Thinking