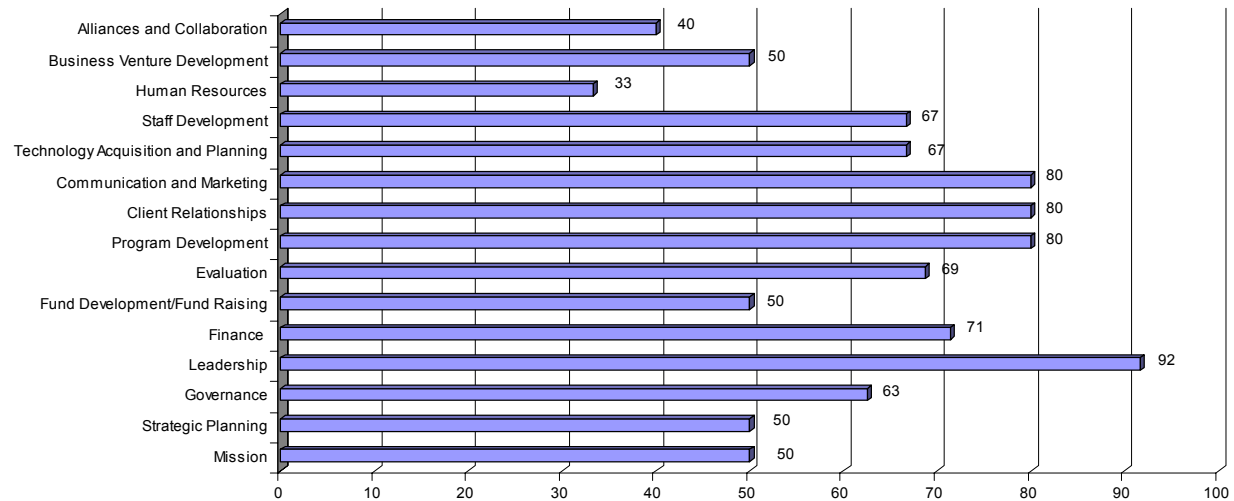# The Bruner Foundation

Evaluative Thinking

Assessment Tool

Sample Report

Interpreting your results and developing Action Plans.

Your evaluative thinking assessment results will automatically be generated by your answers to each of the items on the 15 pages of questions about evaluative thinking and organizational capacities. Three sets of results will be available:

1)You can print the responses to each item for each organizational area – assessments and priorities – using Excel's print menu. The individual worksheets are designed for printing.

2) A summary score report will be generated and can also be printed. It shows how many indicators of evaluative thinking were identified in each capacity area, using this assessment tool, and where actions are suggested or required..

3) A graphic display of the summary score report will be generated. This provides a visual aid to inspire action planning. Because the results are already adjusted for items that do not apply, scores reflect needs for attention. Thresholds for the scores, however, must be determined by the organization conducting the assessment.   In other words, organizations must decide when the value of a score (from 1 – 100 for each area) indicates the need for action (e.g., if the score is below 60).

A reminder about Evaluative Thinking Assessment Scores

The evaluative thinking assessment scores are valid percents for each organizational capacity area (mission, strategic planning, leadership, etc.). They clarify the number of affirmative answers for all indicators of evaluative thinking within a capacity area.

When a score is high, it signifies that the respondents agree most Evaluative Thinking practices are present. Lower scores suggest that respondents think that Evaluative Thinking practices are not present for some or many indicators. The evaluative thinking assessment scores are not grades, however and there is NO set scale. Organizations must define for themselves when scores are low enough to suggest actions and which actions have priority.

To Prepare for Action Planning
After reviewing the Evaluative Thinking scores for each organizational capacity area shown in the summary chart, respondents much indicate their sense of the need for action to be taken. If the score is lower than desirable, then they should indicate whether action is suggested or required. Priority ratings for each evaluative thinking indicator within each capacity area should be reviewed.

Bruner Foundation
Modified Evaluative Thinking Assessment Tool (V2-2007)

Introduction

The *Evaluative Thinking Assessment Tool* was created in 2005 by Bruner Foundation evaluation consultants and representatives from 12 non-profit organizationsin Rochester, New York to assess the extent to which evaluative thinking is present in various organizational capacity areas. The tool grew out of the Bruner Foundation's Evaluative Thinking in Organizations Study (ETHOS). For more information about ETHOS please see the Bruner Foundation websit e (www.brunerfoundation.org).

The Bruner Foundation and its partners define *Evaluative Thinking* as a type of reflective practice that incorporates use of systematically collected data to inform organizational decisions and other actions. The key components of *evaluative thinking* include:

- asking questions of substance,
- determining what data are needed to address the questions,
- gathering appropriate data in systematic ways,
- analyzing data and sharing results,
- developing strategices to act on evaluation findings.

The *Evaluative Thinking Assessment Tool* was developed by the partners after a review of multiple organizational assessment instruments. The tool specifically focuses on indicators of evaluative thinking for a critical subset of organizational capacities at a particular point in time: Mission, Strategic Planning, Governance, Finance, Leadership, Fund Development/Raising, Evaluation, Client Relationships, Program Development, Communication & Marketing, Technology Acquisition & Training, Staff Development, Human Resources, Business Venture Development and Alliances and Collaborations.

This modified version of the Evaluative Thinking Assessment tool was designed to capture leader perceptions about Evaluative Thinking in a critical subset of organiztaional capacities, for a particular point in time. Both the original and this modified version of the *Evaluative Thinking Assessment Tool* include multiple questions (indicators of evaluative thinking) in 15 different organizational capacity areas. For each item on this modified version of the assessment tool, you are asked to report, whether an indicator of evaluative thinking is present or not using the codes shown in column C of each worksheet. (If you are uncertain about the presence or absence of the indicator the *"don't know"* answer selection should be chosen.) Summarizing your best projections about evaluative thinking assessment data will help your organization recognize whether and to what extent it is incorporating specific evaluative thinking strategies into its work, and in which organizational areas. This tool is still under development and subject to further revisions.

Organizational leaders should complete all 15 worksheets in this instrument and then view the summary table and summary graph that will be generated automatically (print if desired). Read each line and then enter a 1 in column C if the indicator of evaluative thinking is present in the organization, or a zero if it is not. If you are not sure whether the indicator is present or not, just skip to the next indicator. The score will be automatically adjusted. You are advised to assign a '1' if an indicator is mostly or always true about your organization. If you think the indicator may have happened, or happens inconsistently, or is really not happening at all in your organization, assign a '0'. Unless it is otherwise specified in the individual item, please base your response on the most recent completed program year for your organization.

The Evaluative Thinking Assessment Tool was designed to facilitate discussions about: perceptions of evaluative thinking in multiple organizational areas; changes in evaluative thinking; and challenge areas where additional evaluative thinking might be incorporated into organizational work. Evaluative Thinking Assessment scores can also inform the setting of priorities regarding incorporation of or enhancement of evaluative thinking in organizational practice. When the absence of a specific component is reported, tool users are encouraged to indicate a sense of the priority (higher, lower or not a priority) with which the absence should be addressed. Users of the tool are also encouraged to think about score thresholds for their own organizations – what is ideal, what is expected, and what is unacceptable; and to think of responses to challenge areas that are identified through its use. This modified version of the tool should inspire similar thoughtfulness – where is evaluative thinking obvious and substantial, and where is additional evaluative thinking needed.

Please proceed to the General Information Worksheet to begin.

GENERAL INFORMATION

Organization	
Number of Staff (FTE)	
Total Annual Expenses (from most recent fiscal year)	
Age of Organization	
Tenure of Current ED/CEO in years	
Name of Person Submitting Final Assessment Ratings	
Title of Person Submitting Final Assessment Ratings	
Phone Number of Person Submitting Evaluative Thinking Assessment Ratings	
Email of Person Submitting Evaluative Thinking Assessment Ratings	
Date This Evaluative Thinking Assessment was Completed	

Others Involved with the Evaluative Thinking Assessment Process	
Name	
Title	
Name	
Title	
Name	
Title	
Name	
Title	
Name	
Title	

Please proceed to the first Evaluative Thinking Assessment Worksheet.

ORGANIZATION MISSION		
	Assessment	**Priority**
a. **The mission statement is specific enough to provide a basis for developing goals and objectives**	1	
b. **The mission is reviewed and revised on a scheduled basis (e.g. annually)with input from key stakeholders as appropriate**	0	This is a high priority this year
c. **The organization regularly assesses compatibility between programs and mission**	1	
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)**	0	This is a lower priority
Comments:		

STATEGIC PLANNING		Assessment	Priority
a.	There is a formal process for strategic planning	1	
b.	Input for strategic planning is obtained from key stakeholders (staff, board, community and clients) where appropriate	1	
c.	Activities within strategic planning are assessed at least annually by key stakeholders (staff, board, community and clients) where appropriate	0	This is a lower priority this year.
d.	Strategic planning informs decision-making	0	This is a high priority this year
	Comments:		
	Please proceed to the next Worksheet		

GOVERNANCE		
	Assessment	Priority
a. **Board goals/workplan/structure are based on the mission and strategic planning**	1	
b. **Board uses evaluation data in defining goals/workplan/structure and organizational strategic planning**		
c. **Board regularly evaluates progress relative to own goals/workplan/structure**	0	This is not a priority for this year
d. **There is a systematic process and timeline for identifying, recruiting, and electing new board members**	1	
e. **Specific expertise needs are identified and used to guide board member recruitment**	0	This is not a priority for this year
f. **The board regularly (e.g., annually) evaluates the executive director's performance based on established goals/workplan**	1	
g. **Board members assess and approve the personnel manual covering personnel policy**	1	
h. **The board assess the organization's progress relative to long-term financial plans**	0	This is a high priority this year.
i. **The board assess the organization's progress relative to program evaluation results**	1	
Comments:		

	FINANCE	Assessment	Priority
a.	The organization has systems in place to provide the appropriate information needed by staff and board members to make sound financial decisions		
b.	The organization develops an annual comprehensive operating budget which includes costs for all programs, management and fundraising and all sources of funding		
c.	The organization monitors unit costs of programs and services through the documentation of staff time and direct expenses	0	This of lower priority
d.	The organization uses a process for allocation of management and general fundraising expenses	1	
e.	Financial status of organization is assessed regularly (at least quarterly) by board and executive leaders	1	
f.	The organization prepares financial statements on a budget versus actual and/or comparative basis to achieve a better understanding of finances		
g.	The organization periodically forecasts year-end revenues and expenses to assist in making sound management decisions	1	
h.	The organization has a review process to monitor that they are receiving appropriate and accurate financial information whether from a contracted service or internal processing	1	
i	Capital needs are reviewed at least annually	0	This is not a priority for this year
j	The organization has established a plan identifying actions to take in the event of a reduction or loss in funding	1	
	Comments:		

LEADERSHIP		
	Assessment	**Priority**
a. **Executive leaders support and value program evaluation and evaluative thinking**	1	
b. **Plans for executive leadership succession include attention to evaluation – the new executive leader is expected to value and be knowledgeable about evaluation**	1	
c. **Executive leaders support and value program evaluation**	1	
d. **Executive leaders use evaluation findings in decision-making for the organization**	1	
e. **Executive leaders educate staff about the value of evaluation**	1	
f. **Programming decisions are based in part, on program evaluation results**	1	
g. **Executive leaders motivate staff to regularly use specific evaluation strateiges**	1	
h. **Executive leaders modify the organizational structure as needed to embrace change in response to evaluation findings**	1	
i. **Executive leaders foster use of technology to support evaluation and evaluative thinking**	1	
j. **Management uses data to set staff goals and evaluate staff performance**	0	This is not a priority for this year
k. **Plans for management succession include attention to evaluation – new managers are expected to value evaluation and where possible are knowledgeable about evaluation**	1	
l. **Staffing decisions are based on data**	1	
Comments:		

FUND RAISING/FUND DEVELOPMENT

	c	Assessment	Priority
a.	**Organization follows a written fund development plan (clarifies which grants and contracts will be pursued)**	0	This is a high priority this year
b.	**Fund raising plan is regularly reviewed and revised as needed**		
c.	**Staff are involved in developing, assessing and revising the fund raising plan (where appropriate)**	1	
d.	**Board members are involved in developing, assessing and revising the fund raising plan (where appropriate)**	0	This of lower priority
e.	**The costs and benefits for fund raising events and activities are assessed**	0	This is a high priority this year
f.	**Organization conducts research on potential fund development opportunities (grants and contracts) and assesses which to pursue**	1	
g.	**Staff (as appropriate) are involved in writing grant proposals (particularly sections on program design and outcomes)**	1	
Comments:			

		EVALUATION	Assessment	Priority
a.		The organization develops and follows an evaluation plan that clarifies which programs and organizational features are to be subjects of evaluation and details how evaluation will be undertaken	1	
b.		There are organizational funds dedicated to evaluation	1	
c.		There is a key staff person (or persons), with evaluation expertise, to address the organization's evaluation needs	1	
		The organization provides (or obtains) training in evaluation for program staff members	0	This is a high priority this year
d.		There are organizational staff members whose jobs or components of their jobs are dedicated to evaluation	1	
e.		The organization hires evaluation consultants when needed	0	This is a high priority this year
f.		Evaluations that include attention to characteristics, activities and program and client outcomes are regularly conducted for organization programs	1	
g.		Executive Directors/Senior Managers, as appropriate, are involved in developing/revising program evaluation plans	1	
h.		Executive Directors/Senior Management, as appropriate, are involved in collecting and analyzing program evaluation data	0	This is a high priority this year
i.		Program Staff, as appropriate, are involved in developing/revising program evaluation plans	1	
j.		Program Staff, as appropriate, are involved in collecting and analyzing program evaluation data	0	This of lower priority
k.		Results of program evaluations are shared with Executive Directors/Senior Management	1	
l.		Results of program evaluations, including findings about client outcomes, as appropriate, are shared with staff	1	

	EVALUATION	Assessment	Priority
m.	**Results of program evaluations, including findings about client outcomes, as appropriate, are shared with clients**	0	This is a high priority this year
n.	**Results of program evaluations, including findings about client outcomes, as appropriate, are shared with board**	1	
o.	**Results of program evaluations, as appropriate, are shared with funders**	1	
p.	**Program evaluation drives continuous improvement of programs**		
	Comments:		
	Please proceed to the next worksheet		

CLIENT RELATIONSHIPS		
	Assessment	Priority
a. **Services reflect client needs**	1	
b. **Client needs assessments are conducted regularly (annually or more often as needed)**	1	
c. **Client satisfaction is regularly assessed (annually or at program conclusion)**	0	This is a higher priority this year
d. **Results of client outcome assessments and client satisfaction are used in development of new programs**	1	
e. **Clients have meaningful involvement in the process of program development**	1	
Comments:		
Please proceed to the next Worksheet		

	PROGRAM DEVELOPMENT		
		Assessment	**Priority**
a.	**The organization identifies gaps in community services before planning new programs**	1	
b.	**The needs of the target population are assessed as part of program planning process**	1	
c.	**Data from needs assessments and/or gaps analyses inform planning**	1	
d.	**Findings from program evaluation are incorporated into the program planning process**	1	
e.	**Findings from program evaluation are incorporated into the program modification process**	1	
f.	**Program staff are involved in developing/revising program plans**	1	
g.	**Clients, where appropriate, are involved in developing/revising program plans**	0	This is not a priority for this year
h.	**Executive leadership is involved in developing/revising program plans**	1	
i.	**Fund development personnel are involved in creating/revising program plans**	0	This is not a priority for this year
j	**Each program has a logic model or some logical formulation of their program**	1	
	Comments:		
	Please proceed to the next worksheet		

Evaluative Thinking Assessment Draft V2 Sample Report 2007

COMMUNICATION AND MARKETING			
		Assessment	**Priority**
a.	**Organization uses marketing and communications planing to help achieve organization's objectives**	1	
b.	**Organization's marketing and communications plans are linked to strategic organizational plan**	0	This a lower priority
c.	**Staff, as appropriate, participate in development/revision of marketing/communication planing**	1	
d.	**Board members, as appropriate, participate in development of marketing/communication planing**	1	
e.	**Organization assesses the effectiveness of its marketing and communications planing toward achievement of organizational objectives**	1	
	Comments:		
	Please proceed to the next Worksheet		

TECHNOLOGY ACQUISITION PLANNING AND TRAINING			
		Assessment	**Priority**
a.	**An assessment process is in place to make decisions about technology maintenance, upgrades, and acquisition**	1	
b.	**Technology systems include software that can be used to manage and analyze evaluation data (e.g., Excel, SPSS)**	1	
c.	**Technology systems provide data to evaluate client outcomes**	1	
d.	**Technology systems provide data to evaluate organizational management**	0	This a lower priority
e.	**Technology systems are regularly assessed to see if they support evaluation**	0	This is a higher priority this year
f.	**Staff technology needs are regularly assessed**	1	
	Comments:		
	Please proceed to the next worksheet		

	STAFF DEVELOPMENT		
		Assessment	**Priority**
a.	**A formal staff development needs assessment is done annually**	0	This a lower priority
b.	**There is a plan for staff development, based on needs assessment data**		
c.	**The staff development plan is evaluated**		
d.	**There are opportunities for staff to assess staff development training sessions**	1	
e	**Results of staff training assessments influence future staff development**	1	
	Comments:		
	Please proceed to the next worksheet		

HUMAN RESOURCES		
	Assessment	**Priority**
a. **Organization has an established personnel performance review process**	0	This is not a priority for this year
b. **Performance reviews are used (at least annually) to provide feedback relative to performance expectations**	0	This is not a priority for this year
c. **Staff are provided with the opportunity to evaluate their own performance**	0	This is not a priority for this year
d. **Organization collects and updates information on credentials, training and cultural competencies of staff**	0	This is a high priority this year
e. **Organization uses results of data collected regarding staff credentials, training and cultural competencies to evaluate composition of staff**	0	This is a high priority this year
f **The organization uses results of data collected regarding staff credentials, training and cultural competencies to recruit, hire and train culturally competent staff**	0	This is not a priority for this year
g **Organization has an annual staff satisfaction survey**	1	
h. **Results of staff satisfaction surveys are used to inform modification of policies and procedures at the agency**	1	
i **Job descriptions are assessed and revised annually**	1	
Comments:		

	BUSINESS VENTURE DEVELOPMENT		
		Assessment	**Priority**
a.	**Organization systematically identifies gaps in community services**	0	This is a high priority this year
b.	**Organization assesses whether they have the capacity to bring in new business**	1	
c.	**Organization researches new business venture developments**	1	
d.	**Organization strategies regarding new business ventures are based on capacity findings, and results of gap studies and business venture development research**	0	This is a lower priority
	Comments:		
	Please proceed to the next worksheet		

ALLIANCES AND COLLABORATION			
		Assessment	Priority
a.	Existing partnerships/alliances/collaborations are evaluated based on mission and strategic planning	1	
b.	Planning is conducted to identify additionally needed partnerships/ alliances/collaborations	1	
c.	Partnership formation is guided/informed by established criteria	0	This is not a priority for this year
d.	Clear goals and workplans for partnerships/alliances/collaborations are established	0	This is a high priority this year
e.	Partnerships/alliances/collaborations are assessed regularly	0	This is a lower priority
	Comments:		
	Please proceed to the Summary Table to Review Assessment Scores		

Bruner Foundation
Evaluative Thinking Assessment

	Organizational Capacity Area	Capacity Score*	Action Planning** (Select from list)
1	**Mission**	50	Action suggested see priorities
2	**Strategic Planning**	50	Action suggested see priorities
3	**Governance**	63	No action required in this area
4	**Leadership**	92	No action required in this area
5	**Finance**	71	Action suggested see priorities
6	**Fund Development/Fund Raising**	50	Action suggested see priorities
7	**Evaluation**	69	Action required see priorities
8	**Program Development**	80	No action required in this area
9	**Client Relationships**	80	No action required in this area
10	**Communication and Marketing**	80	No action required in this area
11	**Technology Acquisition and Planning**	67	Action suggested see priorities
12	**Staff Development**	67	Action suggested see priorities
13	**Human Resources**	33	Action required see priorities
14	**Business Venture Development**	50	No action required in this area
15	**Alliances and Collaboration**	40	No action required in this area

*Evaluative Thinking Assessment Scores

The scores are valid percents for each organizational capacity area (mission, strategic planning, executive leadership, etc.) They clarify the number of affirmative answers for all items within a capacity area.

$$\frac{\text{\# of yes answers for all items}}{\text{\# of yes or no answers for all items}} \times 100$$

When a score is high it signifies that the respondents agree most Evaluative Thinking practices are present. Lower scores suggest that the respondent thinks that Evaluative Thinking practices are not present for some or many indicators.
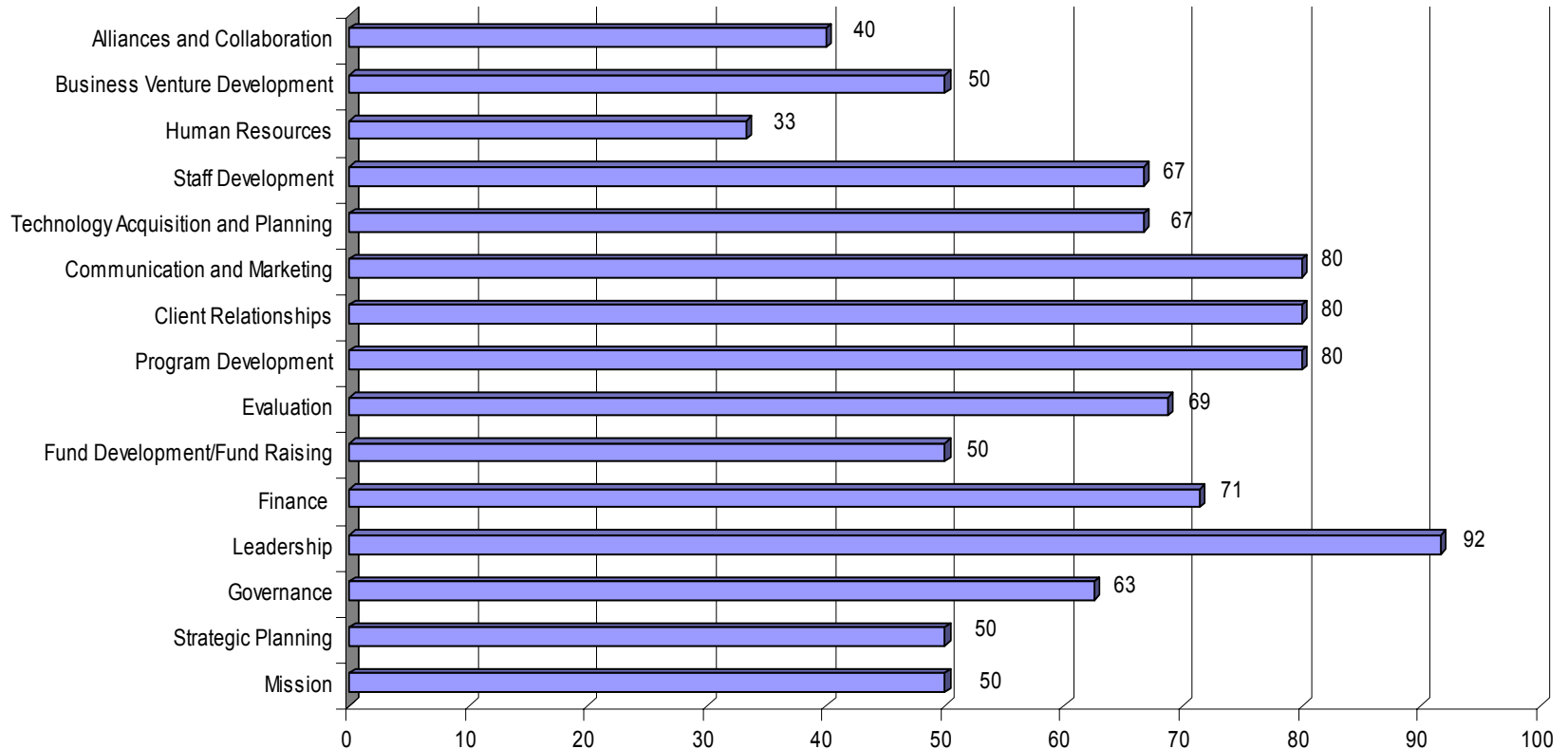
* Instrument users are reminded that "scores" will fluctuate depending on who is asked to complete the assessment and when the assessment is conducted.
 For this scoring strategy, "Unknown to Respondent" answers are not incorporated into the scores

** Action Planning   `

After reviewing the Evaluative Thinking scores for each organizational capacity area shown in the summary chart, please indicate your sense of the need for action to be taken. If the score is lower than desirable, then indicate whether action is suggested or required. Review also the priority ratings for each evaluative thinking indicator within the capacity area. USE THE DROP DOWN LIST TO SHOW WHETHER ACTION IS NEEDED. CLICK ON THE DOWN ARROWS IN EACH CELL TO ACCESS THE SELECTIONS.

This is of higher priority -- requires attention soon
This is of lower priority
This is not a priority for this year

Evaluative Thinking Scores

Category	Score
Alliances and Collaboration	40
Business Venture Development	50
Human Resources	33
Staff Development	67
Technology Acquisition and Planning	67
Communication and Marketing	80
Client Relationships	80
Program Development	80
Evaluation	69
Fund Development/Fund Raising	50
Finance	71
Leadership	92
Governance	63
Strategic Planning	50
Mission	50

Interpretation:

Results for the Sample organization are mixed and several areas are likely to require action. Those involved in the assessment reported that their staff leadership regularly uses evaluative thinking (score is 92). Evaluative Thinking Assessment Respondents also indicated that evaluative thinking was regularly used when the organization conducts communication and marketing, client relationship-related, and program development tasks. These score results also suggest that evaluative thinking could be strengthened in the areas of finance, evaluation, fund development, strategic planning, mission, business venture development, alliances and collaboration and especially human resources. The summary chart shows their intentions to address these findings.