



I think this program will be a huge asset to our organization.
BEC Class of 2013 Participant

BUILDING EVALUATION CAPACITY

Summary Report 2011-12

Submitted To:
Hartford Foundation for Public Giving

Submitted By:
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August 2012



I. INTRODUCTION

BEC was initiated in the fall of 2006 by the Hartford Foundation for Public Giving's Nonprofit Support Program. It was designed to give grantee organizations the knowledge, skills and tools to evaluate, improve and communicate about their work. The class of 2013 is the third group of Hartford-area nonprofits to participate. BEC is a multi-year program that includes evaluation capacity development for selected organizations (in this case, the class of 2013) and opportunities for ongoing study for participating organizations that have completed the initial evaluation capacity building work (i.e., the BEC alumni group). The evaluation capacity building training operates over two cycles (cycle 1 = initial training, cycle 2 = project implementation and continued training). Each cycle is designed to provide comprehensive, long-term training and coaching to increase both evaluation capacity and organization-wide use of evaluative thinking for participating organizations.

BEC was adapted from the Bruner Foundation-sponsored Rochester Effectiveness Partnership.¹ It was developed by and it has been since its inception, conducted by Anita Baker, Ed.D., an independent evaluation consultant who has lead four other similar projects in Rochester, New York, New York City, and the Metrowest (Framingham) area of Boston, Massachusetts. In 2011-12, BEC was delivered to representatives from 12 selected nonprofit organizations that are the main focus of this report, and to representatives from 5 alumni organizations from the two previous BEC classes (see Section II for full descriptions of the class of 2013 and alumni participants). The 2011-12 BEC program year included two cycles. During the first cycle during fall 2011, BEC initial training curricula was revised, participants for the class of 2013 were recruited and alumni study was re-designed and initiated. During the second cycle during winter/spring 2012, the class of 2013 initial training was conducted and alumni study concluded.

The BEC curricula for the class of 2013 and alumni were designed to provide comprehensive evaluation training and coaching to inspire evaluative thinking and increase the capacity of participants to incorporate evaluation into their regular organization work. The initial training period for the class of 2013 included six didactic sessions with opportunities to practice and apply new skills

¹ REP was a self-governing partnership of funders, nonprofit service provider organizations and evaluation professionals committed to increasing knowledge and use of participatory program evaluation through comprehensive training and guided evaluation projects. Visit the Bruner Foundation at www.Brunerfoundation.org for more details.

(see details, Section II) and one individualized consultation session for each agency. Participants also completed homework assignments to demonstrate their understanding of evaluation-related and evaluative thinking concepts. In addition, evaluation coaching was offered to participating teams in-between each formal training session. BEC 2011-12 culminated with each participating class of 2013 organization developing a rigorous evaluation design for a selected program of their own. These designs, which are to be implemented during 2012-13, demonstrated enhanced evaluation capacity and were presented and discussed at the final conference session. For alumni, BEC curricula included focused attention to analytical procedures and strategic use of data. Alumni activities included regular training sessions, individual consultation, completion of evaluation projects and participation in the BEC final conference.

BEC curricula and 2011-12 training sessions were re-designed somewhat for the class of 2013 and the alumni group as well. During summer and fall 2011, two focus groups were held, one with current alumni study participants and the other with both current alumni study group members and other former BEC alumni. Based heavily on their input, the class of 2013 initial training curriculum was streamlined (see following) and focused particularly on evaluation design. The alumni curriculum was upgraded to include an intensive focus on analytical procedures and tools. Two concurrent projects undertaken by the BEC trainer also informed BEC revisions.

- **MetroWest Evaluation Institute (MWEI).** MWEI was initiated by the MetroWest Health Foundation and conducted in Framingham, Massachusetts. Though not a Hartford Foundation-sponsored project, MWEI was strongly influenced by BEC program design,² and it informed choices regarding the strengthening and upgrading of BEC class of 2013 curricula. The project was completed fall 2011.
- **Anchoring Evaluative Capacity Project.** During the summer of 2011, the BEC trainer independently developed an ancillary program for BEC alumni with input from specific alumni participants. The resulting “Anchoring” project was jointly supported by Anita Baker/Evaluation Services, the Bruner Foundation, and the Hartford Foundation for Public Giving. Three alumni groups (Hartford Gay and Lesbian Health Collective, Latino Community Services, YWCA of Greater Harford) participated in agency-wide evaluation training provided to both enhance their prospects of maintaining evaluation capacity and to inform the development of curricula and strategies for use with new classes of BEC participants to help

² MetroWest Health Foundation program officers reached out to the Philanthropic Community for advice regarding evaluation capacity building. A Nonprofit Support Program Program Officer responded with information about BEC and introduction to the BEC trainer who subsequently through a competitive bid was selected to conduct the Institute. Details about MWEI and final project results are available upon request.

II. BEC TRAINING 2011-2012

The purpose of the initial BEC training was to inform participants about evaluation planning, data collection, and use, and to provide them with opportunities to apply what they learned. The class of 2013 BEC participants included key decision-makers (e.g., Executive Directors, Program Directors, other designees) and other staff from 12 nonprofit organizations from the Greater Hartford community. Alumni training, designed to provide ongoing guided evaluation experiences and advanced learning opportunities for BEC participants from the classes of 2008 and 2010, as well as assistance for them as they indoctrinated new staff, was also conducted. As stated in section I, training and alumni group facilitation were conducted by Anita Baker who also served as the trainer and evaluator for the first two classes of BEC in Hartford. Program administration, including conceptual and fiscal support, oversight, and communications, was provided by the Nonprofit Support Program.

Class of 2013 Training Implementation

The content and delivery structure for BEC was modified for the class of 2013. Specifically, training sessions were condensed from eight to six sessions, additional hands-on activities³ were incorporated, and homework was streamlined so that all BEC work was integrated into the final evaluation design that was the culminating project. Training for class of 2013 members included six 3.5-hour sessions, one 1-hour independent consultation session for each organization, and the final conference session (25 hours total). Each training session included some lecture-style presentation, opportunities for individuals and groups to try out new material and to work on applications for their own organizations, and opportunities for individuals within and across teams to confer regarding their work, evaluation and evaluative thinking. All sessions included homework that resulted in usable products (e.g., surveys, logic models, action plans) and components of evaluation designs. BEC participants were also exposed to the concept of evaluative thinking, and how organizations can enhance and sustain evaluative thinking and evaluation capacity. Topics, activities and homework covered at each session of the initial training period for the class of 2013 are shown in Table 1.

³ Added hands-on activities included assessment of own agency survey, trial development of an e-survey, analysis of quantitative survey data using 25 completed surveys; and analysis of open-ended survey data. Summarization of interview findings using completed interviews, though not new, was introduced earlier. Additional level of effort predictions and workplan/timeline development was done using automated forms.

In addition to the training sessions described previously, the evaluation consultant/trainer also provided individual technical assistance for all participants, as needed, via email, phone calls, or through face-to-face meetings. This individual technical assistance was mostly conducted to help participants complete their homework or directly apply what they had learned in their own organizations (e.g., to revise an existing survey, assess existing data collection strategies, or review an evaluation design being proposed for one of their programs). Several participants also requested other help (e.g., assistance with grant development including evaluation design for another program, and additional training for staff who could not attend scheduled BEC sessions).

Table 1: BEC Class of 2013, Session Descriptions

Session	Date	Session Content	Activities	Homework
1	1/11/12	EVALUATION BASICS Intro/Importance Terminology/Background, Context Evaluation questions Evaluation stakeholders Evaluation design Evaluation logic Evaluative thinking	<ul style="list-style-type: none"> • Ice breaker • Tech check • Developing evaluation questions • Initial evaluation design planning • Specifying evaluation questions • Identifying stakeholders 	Complete the initial planning assignment, specify evaluation questions
2	1/25/12	LOGIC MODELS AND EVALUATION LOGIC Logic model overview Assessing logic models Outcomes, indicators, targets	<ul style="list-style-type: none"> • Agency introductions • Logic model scramble • Outcomes/Indicators/Target scramble • Develop/Refine logic model for selected program 	Complete logic model for selected program
3	2/15/12	DOCUMENTING IMPLEMENTATION DATA COLLECTION OVERVIEW SURVEY DEVELOPMENT Documenting program strategies Data collection overview Introduction to surveys	<ul style="list-style-type: none"> • Logic model gallery walk • Planning for program documentation • Survey assessment (survey goof) • Analysis of own agency survey 	Continue work on initial planning assignment, including initial data collection decisions. Work on survey instrument and administration plans

Table 1 (Continued): BEC Class of 2013, Session Descriptions

Session	Date	Session Content	Activities	Homework
4	3/7/12	SURVEYS AND RECORD REVIEWS ANALYZING QUANTITATIVE DATA Developing electronic surveys Using record reviews Basics of quantitative data analysis	<ul style="list-style-type: none"> • Electronic survey trials • Record review decision making • Analyzing surveys and record reviews (hands-on analysis of 25 completed surveys) 	Continue work on the initial planning assignment. Complete survey or record review protocols and analysis plans, try an e-survey.
5	3/21/12	OBSERVATIONS AND INTERVIEWS ANALYZING QUALITATIVE DATA Using observations to collect evaluation data Conducting interviews Analyzing qualitative data	<ul style="list-style-type: none"> • Observation quiz • Observation trial • Practice interviews • Analyzing open-ended survey data (hands-on analysis of 25 open-ended responses to survey questions) • Analyzing interview data (hands –on analysis of 4 completed interviews) 	Finish initial planning assignment. Develop observation or interview protocols and analysis plans. Begin work on final evaluation design.
Team Consult	4/18/12 or 4/19/12	INDEPENDENT CONSULTATIONS ON DESIGN		
6	5/16/12	PUTTING IT ALL TOGETHER FINAL CONFERENCE PLANS Developing level of effort and timeline summaries Budgeting and paying for evaluation. Introduction to Evaluative Thinking (part 2). Planning for the final conference.	<ul style="list-style-type: none"> • Developing task/timeline level of effort summary (hands-on activity using automated tool) • Projecting budget for evaluation study • Planning for the final conference 	Complete Evaluation Design and all instruments, administration and analysis plans.
Final Session	6/13/12	FINAL CONFERENCE: PRESENTATION of DESIGNS		

Class of 2013 Participants

Nonprofit Support Program staff invited non-profit organizations in the region to apply for the BEC class of 2013. Twelve organizations, as described in Table 2, were selected to participate (see also the Appendix for a full listing of all BEC organizations). As shown, the group of BEC participants, like those from the two preceding classes, delivered different types of services and was broadly representative of Hartford area nonprofit organizations.

Table 2: BEC Class of 2013, Selected Organizations

Organization	Primary Service Area	# of Team Members	Teams
Brain Injury Alliance of Connecticut	Brain injury prevention and recovery	4	Executive Director, Director of Brain Injury Services, Director of Community Outreach & Support, Brain Injury Specialist
Connecticut Landmarks	Historic landmark properties and museums spanning three centuries of Connecticut history	3	Executive Director, Education & Historic Sites Manager, Community Education & Liaison
Educational Resources for Children, Inc.	Providing innovative services to families and children after-school	3	Executive Director, Office Manager, Lead Center Administrator
Gifts of Love, Inc.	Provides basic needs including food, clothing, furniture, household items, & energy assistance to people in the Greater Hartford area	2*	Executive Director, Program Staff Member
Immaculate Conception Shelter & Housing Corp.	Emergency shelter, supportive housing and outreach programs focused on men living with HIV/AIDS and those with severe substance abuse problems and mental health issues	3	Executive Director, Supportive Housing Director, Clinical Director
Mutual Housing Association of Greater Hartford	Develops and manages affordable housing in Greater Hartford while engaging residents in leadership and educational opportunities	3	Executive Director, Project Coordinator, Resident Initiatives Coordinator

Table 2: (Continued) BEC Class of 2013, Selected Organizations

Organization	Primary Service Area	# of Team Members	Teams
National Conference for Community and Justice	Human relations organization dedicated to fighting bias, bigotry and racism in America offering social programs	2**	Executive Director Director of Youth Services
Noah Webster House & West Hartford Historical Society	Museum in the restored 18th-century birthplace and childhood home of Noah Webster	3	Executive Director, Coordinator of Public Programs, Coordinator of Education
Open Hearth Association	Rehabilitation center, residential health care	4	Executive Director, Employment, Education and Training Manager, Director of Operations, DOC Counselor
The Salvation Army	Religious and social service organization	5	Major, Area Coordinator of Greater Hartford, Director of Housing Stabilization Services, Foundation Relations Manager, Program Associate
Wadsworth Atheneum Museum of Art	Oldest public art museum in the United States; arts and cultural organization	4	Director of Education, Curator of Contemporary Art, Education Assistant, Development Manager
Women's League Child Development Center	Inner city early childhood education program	3	Executive Director, Assistant Director, Administrative Assistant

*One participant did not complete BEC due to separation from the agency during the course of the sessions

** The youth program director at the time NCCJ was selected for BEC participation moved from the Harford area after the first session. The new youth director began training as/of session 6, and also participated in two intensive "make-up" sessions during late spring 2012.

As they had in the classes of 2008 and 2010, Senior-level officials (i.e., those with decision-making authority) from the selected organizations attended and fully participated in the class of 2013 BEC initial training. They were specifically involved to increase the potential for both extending and sustaining evaluation capacity and evaluative thinking in the organizations. As shown in Table 2, the organizations chose teams of various sizes and involved individuals from various positions according to their own needs for training (e.g., Director of Operations, Director of Community Outreach & Support, Development Manager).

BEC Alumni Training and Participants

At the conclusion of BEC training for the class of 2008, the BEC trainer and Nonprofit Support Program officials developed an alumni option to meet the needs of participants who desired ongoing assistance. An annual alumni-specific program design has been developed and all originally participating organizations from the classes of 2008 and 2010 were invited to continue their BEC study (see appendix for a full list of participating organizations). During 2011-12 (the fourth year of alumni study), five organizations opted to continue: Connecticut Historical Society (Class of 2010), Community Renewal Team (Class of 2008), Hartford Gay & Lesbian Health Collective (Class of 2010), Latino Community Services (Class of 2008), and YWCA of Greater Hartford (Class of 2010). Each of these organizations identified one or more participants to attend training and group sessions and undertake project work. Each organization and individual participant in the alumni group 2011-12 had participated in the group the previous year. Three of the five organizations (HGLHC, LCS, YWCA) also participated in the anchoring project (see box below).

The BEC Alumni group met for five group sessions, four individual consultations and one final conference during 2011-12. These two-hour meetings were held immediately following the BEC class of 2013 group training sessions. Alumni training sessions differed from the original training in that the group was more actively involved in selecting training topics and assisting with the delivery of training, and in 2011-12 training content was focused on data analysis and use of tools. There were regular requirements for each organization to present status reports about their projects and to give feedback to each other regarding project progress. Specifically, the first two training sessions focused on strategic uses of data and designing BEC evaluation projects. Both of the first two training sessions included “refresher” materials where the group had opportunities to review key topics from the evaluation essentials training, and discuss project plans. The final three training sessions included (1) an Excel workshop on storing and using data, (2) e-survey administration and design, and (3) using SPSS (*Statistical Package for the Social Sciences*) for data storage and analysis. The last session was a final project consultation in preparation for the final conference.

The Anchoring Project was developed to help BEC alumni organizations infuse evaluative capacity into organizational practice. Training involved multiple staff persons and took place at the participating BEC alumni organizations.

Session 1: All Staff, Evaluation Basics

Session 2: All Staff, Data Collection Basics

Session 3: Selected Staff, Planning and Conducting Analyses

III. TRAINING RESULTS

This section of the report presents a summary of findings about the outcomes of BEC class of 2013 training. Findings were compiled from post-session assessments administered electronically after each training and one final participant survey administered soon after the final conference (June 2012).⁴

Participants from all 12 class of 2013 organizations attended regularly and demonstrated they were learning about evaluation and practicing evaluative thinking. Only two participants were unable to complete the training due to changes in their employment status. Most importantly, every participating team mastered content including evaluation planning, data collection and analysis, and was introduced to organizational evaluative thinking. Every organization developed a comprehensive evaluation design for the programs they selected. Details about skill development and learning, perceived importance of BEC, other projected uses of the training, as well as feedback and suggestions regarding ongoing needs for support are presented here. A summary of alumni project work is also included.

Class of 2013 Participants Developed Important Skills

As a result of the initial training, all participants demonstrated understanding of and ability to conduct key evaluation-related skills. This included exposure to and experience with the following:

- **Logic Models & Evaluation Design/Planning:** developing logic models, using logic models to inform program evaluation, specifying evaluation questions, developing an evaluation design, choosing methods to address evaluation questions, projecting level of effort for evaluation, projecting costs for evaluation, and reviewing evaluation designs
- **Data Collection and Data Analysis Planning:** developing surveys, planning administration of a survey, analyzing survey data; developing interview guides/protocols, planning to conduct interviews, planning to analyze interview data, analyzing interview data; developing observation protocols, planning to conduct observations, planning to analyze observations; developing record review protocols, planning to collect record review data, planning for analysis and analyzing record review data

Participants came to the training from different backgrounds and many had at least some prior knowledge of BEC concepts, especially about evaluation questions and stakeholders. Many participants entering with some previous knowledge about evaluation topics, including evaluation

⁴ A total of 30 of 39 participants answered the final training assessment survey representing 11 of the 12 organizations.

purposes, surveys, logic models, and interviews, also reported learning more during the training. Despite the varied knowledge and experience with topics related to evaluation, participants definitely enhanced and added to their skill sets through BEC. On a three point scale ranging from *not at all*, *a little*, to *a lot*, a substantial majority of responding participants reported on the final survey that BEC helped them *a lot*, to develop important evaluation skills (see Table 3). All other participants who were not already knowledgeable about the topics indicated the training had helped at least *a little*.

A huge THANK YOU for all involved in making this such an incredibly valuable program. When we began, we thought we would never be able to evaluate our program. We are now confident that we have the tools to do so, and for that, we are all truly grateful.

BEC Participant, Class of 2013, Final Session Survey



**Table 3: Percent of Class of 2013 Participants Reporting That
BEC Training Helped Them Develop the Following Skills**

	BEC Helped		
	'A Little'	'A Lot'	TOTAL
<i>(Source: Q8, final survey)</i>			
Develop a logic model	18%	82%	100%
Use a logic model to inform program evaluation	15%	85%	100%
Specify evaluation questions	8%	92%	100%
Develop an evaluation design	7%	93%	100%
Choose methods to address evaluation questions	26%	74%	100%
Develop a survey	11%	89%	100%
Plan for survey administration	20%	80%	100%
Plan for survey analysis	23%	77%	100%
Develop an interview guide or protocol	28%	72%	100%
Plan to analyze interview data	33%	67%	100%
Develop an observation protocol	56%	44%	100%
Plan to conduct observations	46%	54%	100%
Plan to analyze observations	48%	52%	100%
Develop a record review protocol	27%	73%	100%
Plan to collect record review data	35%	65%	100%
Plan to analyze record review data	40%	60%	100%
Project level of effort for evaluation	31%	69%	100%
Project costs for evaluation	42%	58%	100%
Review evaluation designs	22%	78%	100%

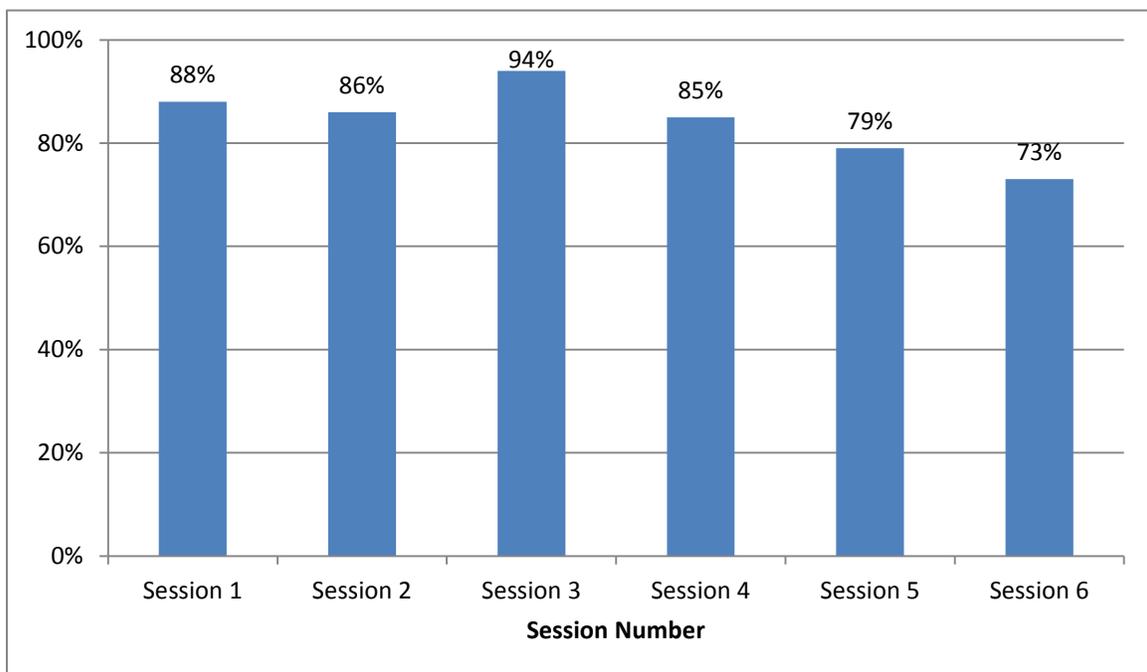
***Note these percentages are based only on those who indicated they did not know the information before BEC. The total number of respondents = 30. Scale included responses: A lot, A little, Not at all**

By the end of the initial training period, everyone shared a common language about evaluation, and every group demonstrated they could apply what they knew to the development of evaluation designs.

Participants Rated the Training Favorably

BEC participants completed anonymous electronic assessments of the training after every session. Specifically, they were asked to clarify whether they learned about session topics new to them, to provide an overall rating for the session, and they were asked how much they thought the session would help with their individual evaluation project, and with their regular work. As shown in Figure 1, participant feedback regarding the sessions overall was consistently positive. On a four point scale ranging from *not so good*, to *excellent*, most participants (over 75%) rated each session, except for Session 6, as *excellent* or *very good*. No one rated any training as *not so good*.

Figure 1: BEC Session Ratings, Class of 2013: Percent of Participants Who Rated Each Session as *Excellent* or *Very Good*



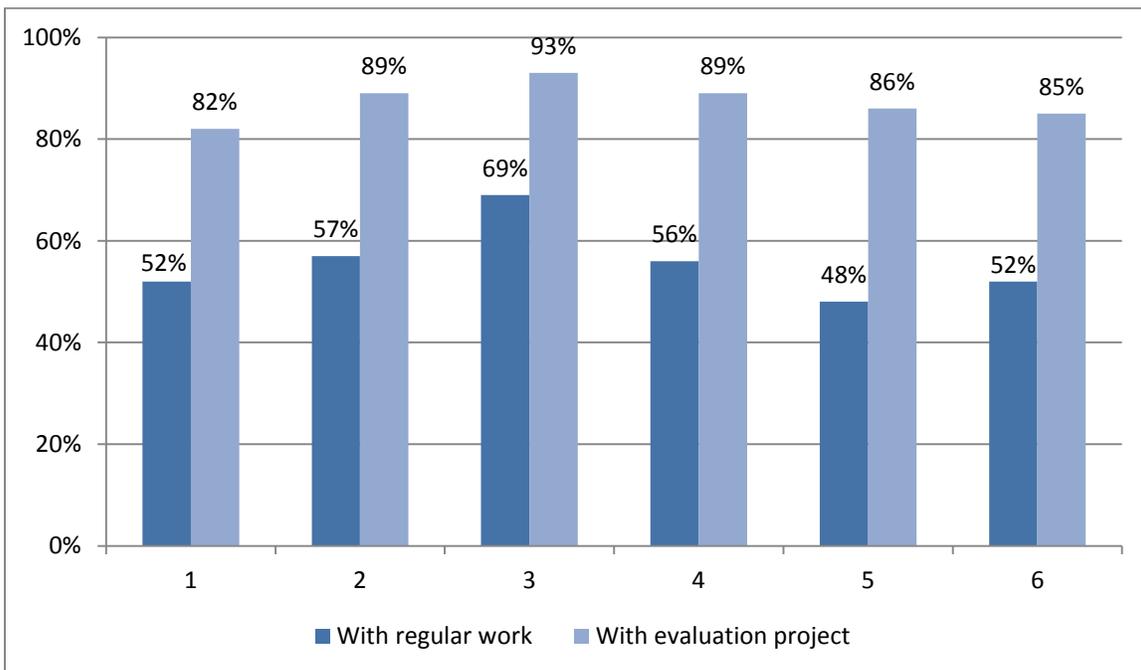
About 6 participants at both Session 5 and Session 6 rated the session as just *okay*. Some participants at session 5 indicated that they struggled with some of the new vocabulary about qualitative data, and at Session 5 and 6 some participants expressed a desire for additional time for both discussion and hands-on opportunities to apply skills. The feedback shown in Figure 1 was particularly valuable as it clarified that the new curriculum content and delivery worked for the most part, but would be

enhanced by scheduling adjustments and some additional content/vocabulary explanations. Cycle II of BEC training (fall 2012 – spring 2013) should provide this and will be closely monitored to determine if additional adjustments are necessary.

BEC training sessions were definitely perceived as useful. Most participants indicated that each session was expected to help *a lot* with BEC evaluation projects. Half or more of the participants consistently reported that what they learned in the BEC training, would also help *a lot* with their regular work (See Figure 2).

It was really nice to be able to see how all of this information, tools, techniques, and skills will be integrated into our program and entire operations for our office. This was an invaluable training and the first thing I did upon returning to the office was get right to work!
BEC Class of 2013 Participant, Session 6

Figure 2: BEC Session Ratings, Class of 2013: Applications of Session Information: Percent of Participants Who Said Session Will Help A Lot



At the conclusion of the initial training period, class of 2013 participants provided additional feedback on the whole experience.

- All survey respondents rated the activities favorably (*good or very good*) including 62% who said they were *very good*.
- All survey respondents rated the slides and the Participatory Evaluation Essentials manual favorably including 60% and 66%, respectively, who said they were *very good*.
- All survey respondents rated the handouts and the activities favorably including 53% who said they were *very good*.
- Most of the survey respondents thought that the length of sessions and number of the sessions was *about right*. Additionally most survey respondents also indicated that the ratio of time spent in formal presentation compared to discussions/activities was *about right*.

Furthermore, all survey respondents (100%) indicated that the trainer was *very available* when they required independent assistance with BEC project work or other evaluation topics. One participant clarified that “[The trainer] *has been a wonderful counselor and mentor in this process. Simply put, there is no one better for the task. Her energy and expertise are always available.*”

Participants Reported That the Training was Worthwhile and Important

In addition to the ratings described above, the final follow-up survey gave BEC class of 2013 participants the opportunity to reflect on the usefulness of the training overall and on individual features. Again **all participants indicated the training was worthwhile** including 48% who said it was *very worthwhile* for them personally. Additionally, **all participants indicated the training was worthwhile to their agency** including 68% who said it was *very worthwhile* (see Table 4 following).



Table 4: Percent of Participants Who Reported That the Training Was Worthwhile

<i>Source: Q11 final e-survey</i>	Not at all	Somewhat Worthwhile	Worthwhile	Very Worthwhile
. . . for you personally?	0	10%	41%	48%
. . . for your agency?	0	0	32%	68%

As clarified by a participant: *We got the help we needed to take our evaluation to the next step. We were able to think through different ideas and it really got us motivated and involved. I have a new/renewed passion for evaluation! This course has and will continue to make our programs more efficient. I viewed this as a priority to better the agency overall.*

Other survey responses showed that participants valued the opportunity to learn about evaluation, and they also valued the opportunities to learn and connect with other professionals during the training (see Table 5). With the exception of one participant who did not find the development or presentation of the evaluation design boards at the final session important, all participants indicated that all key aspects of the training were at least *somewhat important*.

- All survey respondents agreed the opportunity to learn about evaluation was important, including 89% who said it was *very important*.
- All survey respondents indicated the requirement to develop an actual evaluation for a selected program was important including 97% who said it was *very important*.
- All survey respondents indicated opportunities for consultation from the BEC trainer were important including 93% who said it was *very important*.
- All survey respondents indicated opportunities to interact with colleagues in other organizations were important, including 63% who said it was *very important* and 37% who said it was *somewhat important*.
- All survey respondents indicated opportunities to interact with peers from their own organizations were important including 93% who said it was *very important*.
- Some participants thought that the opportunity to develop the presentations was more worthwhile than the actual presentation of the boards, but almost all participants (96%+) thought both these tasks were important.

Table 5: Percent who Reported That the Following Opportunities Were Important (N=29)

<i>Source: Q10 final e-survey</i>	Somewhat Important	Very Important	TOTAL*
Opportunities to learn about evaluation	11%	89%	100%
Requirement to design an actual evaluation for a selected program	3%	97%	100%
Opportunities for consultations from BEC evaluator/trainers	7%	93%	100%
Opportunities to interact with colleagues in other organizations	37%	63%	100%
Opportunities to interact with peers within own organization	7%	93%	100%
Developing a presentation for the final conference session	10%	86%	96%
Presenting your design at the final conference session	29%	68%	97%

Participants Successfully Developed Evaluation Designs

The final project for the BEC training was development of evaluation designs. These designs had to conform to standard professional evaluation practice and showed that BEC participants were able to apply what they learned. Each design described the subject program and why it was selected, specified evaluation questions, and specified which data collection strategies would be used to obtain data to answer the evaluation questions. The designs also included projections of level of effort (i.e., who would do each task and how much time in days or hours would be reserved for them), proposed timelines for evaluation activities (i.e., when – months/days/seasons evaluation activities would happen), and plans for use of the evaluation results. During 2012-13, participants are expected to implement these designs, further develop administration and analysis plans as needed, collect and analyze data according to their plans, and develop reports about their findings. Additional details about each project are provided in the Appendix to this report.

All participants were required to use more than one data collection method, but each team identified which methods made the most sense to obtain salient information to address their questions. Each organization prepared a specific plan to show how each data collection strategy would be used to answer each evaluation question. During the final conference session, participants were able to explain their design choices, including why a program was selected, and why a specific data collection strategy would work to address their needs. They also presented draft or final instruments and administration plans for their data collection and evidence that they had considered data analysis.

The time together was inspiring and motivating. It was a multi-dimensional treat to see the fruit of everyone's BEC efforts during the last session.

BEC Class of 2013 Participant, Session 6

Participants Reported BEC Helped Increase Evaluation Use at Their Agencies

The last BEC assessment question on the final survey asked participants to reflect on how the Sessions had helped them to be more evaluative. Evaluative thinking, as clarified in training and in previous reports, is a type of reflective practice that incorporates use of systematically collected data to inform organizational actions. Key components of *evaluative thinking* include:

- Asking questions of substance and determining what data are needed to address the questions
- Gathering appropriate data in systematic ways
- Analyzing data and sharing findings
- Developing strategies to act on findings

In addition to program development and delivery, evaluative thinking can be applied to various organizational functions such as mission development, human resource decision-making, or communications/marketing. Almost all class of 2013 participants indicated BEC had helped them *a lot* in terms of enhancing evaluative thinking at their agencies. Specifically, a total of 63% of final survey respondents said it helped *a lot*, 33% said it helped *some*, and 1 respondent indicated their agency was already *very evaluative*. Additionally, a total of 79% of the survey respondents stated

that they have already been able to extend or “ripple” what they learned in BEC at least “a little” to others in their agency. In their own words, participants clarified further, their sense of evaluative changes at their organizations.

The BEC project has been very helpful in going forward. The team now looks at all we do through evaluative eyes.

Our organization was not doing evaluation well: we did not have a survey instrument that was working well, we were not consistently collecting the data, we were not focused in our questions. This has been a blessing to our organization as it will trickle down into all of our programs.

We are just getting started. The response will be "a lot" six months from now. Many in our agency are already very, very evaluative. Others are just fledglings.

BEC Alumni Outcomes

All five alumni organizations presented project work at the final conference alongside the class of 2013 presentations. Further, all five organizations completed projects that utilized the enhanced analytical techniques and strategic use of results. Most groups (5 out of 7) who had been alumni in 2010-11 continued their study in 2011-12 (see also appendix for a complete listing of BEC organizations and project involvement). The two BEC alumni teams that did not continue participating dropped out due to organizational changes including hiring a new Executive Director, and other staffing changes. For two organizations, this was the fourth year of alumni participation, and for all, participation had extended at least two years past their initial two-year involvement. This demonstrated a commitment to enhancing evaluation at their agencies. Further, organizations that opted to participate in alumni training attended regularly and took on increasingly challenging work. Participants from the BEC alumni organizations were not required to complete assessment surveys, but all five participating agencies had complete designs and finished projects that they displayed at the conference. Alumni participants also offered feedback to the Class of 2013 at the conference and were able to share their own evaluation projects and designs with the group (see Table 6 and the appendix for additional details about the projects). (Copies of final reports are available upon request directly with alumni organizations).

Table 6: Evaluation Projects – Alumni Groups 2011-12

ORGANIZATION	PROJECT	Strategic Use of Data	Using Excel to Manage & Analyze Data	Using Electronic Surveys	Using SPSS to Analyze Data
Connecticut Historical Society (CHS)	Evaluating Free-Choice Audiences	✓	✓	✓	
Community Renewal Team (CRT)	Determining Change Over Time in Community Needs Assessment	✓		✓	✓
Hartford Gay and Lesbian Health Collective (HGLHC)	Modifying and Using a New, Web-based Client Feedback Survey	✓	✓	✓	✓
Latino Community Services (LCS)	Analyzing Trends in Intake	✓	✓		✓
YWCA Hartford Region (YWCA)	Assessing the Young Women’s Leadership Corps	✓	✓		

Evaluation Projects – Alumni Groups 2011-12

- The CHS project was an evaluation of evaluation procedures, as well as of a particular component of CHS services. The BEC alum designed the work in close collaboration with the Executive Director and both she and the ED conducted extensive review of available evidence and data collection and management strategies (e.g., attendance tracking, contact and query logs). Additionally, they conducted comprehensive interviews with all staff. Results clarified that the evaluation program for Free-Choice visitors was both sustainable and yielding useful data for planning purposes and fund-development.
- CRT conducted a secondary analysis of its Community Needs Assessment data to determine if results for its 2010 survey varied from previous results (i.e., to identify whether important changes occurred in the community). Though CRT was already a regular user of SPSS as an analytic tool, their BEC project provided an opportunity to conduct comprehensive comparative analyses.
- The HGLHC alum made extensive revisions to a customer feedback survey that had been used ineffectively for years. This included conversion of the questionnaire from a satisfaction focus to collection of information about changes in customer health-related behaviors resulting from HGLHC visit services. In addition to substantially revising the questionnaire, the instrument was converted to electronic format, a new quarterly administration strategy was devised and tested to ensure all services were addressed by the inquiry but respondent burden was reduced, and reporting templates were developed that connected survey results for the first time to regular quarterly agency reports.
- LCS conducted a historical review of all intake data for the past 4 years to determine additional details about who their clients are, what needs are most common for different client groups, and which services and how many services are used by different types of clients. To accomplish this multi-variate analysis, alumni team members converted historical records to a single database that was then converted to SPSS for analysis. This was the first time that LCS had utilized SPSS as a tool to help them study trends in their service delivery strategies for different client groups.
- The YWCA conducted a multi-method evaluation of its YWLC program (a complex program with multiple sites and multiple service delivery strategies including group work and multiple seminars by different vendors). The evaluation included collection and analysis of survey, and observation and record review data (attendance and intake). It also included merging of information into analytical files. Multiple team members developed the complex design, collected and entered data into excel databases and analyzed all results. The study identified positive outcomes for many participants and helped to clarify which modules of service were not effective and which types of participants were not benefitting. Results of the study were used internally for program modification and also reported directly to external stakeholders.

NSP Support

During the initial training of the class of 2013, the Hartford Foundation's Nonprofit Support Program continued to serve as the administrator of BEC.⁵ As such, staff from the Nonprofit Support Program handled communication and important scheduling details, and ensured that there was space and refreshment for all training sessions and consultations. (This included facilitation of a move to a larger space to accommodate the large group size.) In addition, program officer Amy Studwell, together with director Annemarie Riemer and special assistant Shirley Beyor, reviewed and participated in training sessions, provided conceptual and operational support to the trainer, and generally oversaw the effectiveness of the program.

All of the class of 2013 survey respondents stated that they thought the Hartford Foundation's Nonprofit Support Program had been either *somewhat supportive*, *supportive*, or *very supportive* of their organization's commitment to learn about evaluation, including (76%) who agreed that the Nonprofit Support Program had been *very supportive*. When asked to elaborate on the support of the Nonprofit Support Program, participants had overwhelmingly positive statements to make including the following:

Being selected to participate in the BEC program this year constitutes a high level of support for our organization. Our organization is changing and continued education on nonprofit trends and methods related to business development is extremely helpful to us.

HFPG-NSP has sublimely defined priorities. The support for learning about evaluation has come just at the time when just such expertise is being expected of us.

I want to thank the Foundation for allowing us to be a part of BEC and helping us to learn the tools to make our efforts in changing our community much more effective!

⁵ The Hartford Foundation for Public Giving's Nonprofit Support Program was developed to help area nonprofits build capacity and increase effectiveness. Its aim is to help nonprofits plan, improve their governance and management, and build strong organizations so that services can be delivered as efficiently as possible. The Nonprofit Support Program offers an array of training programs, grants for technical assistance, assessments, loans, and networking opportunities for nonprofit leaders. BEC is a special training program.

IV. NEXT STEPS

As stated previously, each of the participating Class of 2013 teams developed an evaluation design as the culminating project for the initial training period. All organizations are planning to implement those plans throughout 2012-13 and several of the groups had initiated that process or were planning to do so summer 2012. The alumni group met for the last time at the final conference June 2012 with all group members vowing to use their enhanced evaluative skills. (A new alumni group may be initiated fall 2013).

Issues for Further Consideration: Challenges and Suggestions for Future

The final survey also asked participants about complications that have been identified in similar evaluation capacity building efforts. Specifically, participants reported whether any of the following were serious challenges: competing priorities, time to work together as a team, getting homework done, complexity of the training and communicating with the trainer. Summarized responses are presented in Table 7.

Table 7: Feedback About Challenges from Participants (N=30)

<i>Source: Q14 final survey</i>	Not a Challenge	Somewhat Challenging	Very Challenging
Competing priorities at our agency	26%	48%	26%
Finding time to work together as a team	18%	68%	14%
Getting all the homework done	21%	64%	14%
Understanding the training content	43%	50%	7%
Communicating with the trainer	96%	4%	0

As is always the case when undertaking comprehensive, intensive training, it is hard to strike a balance between learning new things and responding to every day demands. BEC continues to contend with this too. As shown in Table 7, many participants found it hard to address their regular work and organizational needs, and keep up with BEC work. A total of 26% of the class of 2013 participants described this as *very challenging* and 48% said it was at least *somewhat challenging*. Time to work together was also a concern to the majority of participants, although most identified it as only *somewhat challenging*. Homework was tricky, too, but participants were diligent about

getting it done. Two participants found the complexity of the training concepts to be *very challenging*. No participants identified *communication with the trainer* as *very challenging*.

In addition to the question about challenges, there were also inquiries on how to improve BEC. Most class of 2013 participants indicated the design of the first cycle (initial training) had worked well for them, but a few participants offered some useful suggestions.

- A total of 86% of the participants agreed the ratio of formal presentation to discussions/activities was *about right*. (Three of the four dissenting participants thought there was *too much presentation time*.)
- A total of 77% of the participants thought the length of the sessions was *about right*, but 7 others thought the length should be adjusted (3 thought they were *not long enough* and 4 indicated they were *too long*.)
- A total of 77% of participants indicated the number of sessions was *about right*, but again 7 others thought the number of sessions should be adjusted (3 thought there were *too many* and 4 thought there were *too few*).
- Almost everyone, (93% of participants) indicated that the amount of time between sessions was *about right* (the dissenting participant thought the sessions were too far apart).

A few of their final comments are also worth sharing as further clarification regarding BEC alterations. Only five participants made substantive remarks, and among those, only one participant suggested reducing the number of sessions. The other four respondents (B) suggested slowing the pace and providing more opportunities to apply what was learned.

(A) *The training was a wonderful opportunity and expertly handled by [the trainer]. One of the best classes I have attended in many years. This said, with any program there is always room for improvement. I wonder if the number of sessions could be reduced? I believe that less theory and terminology and a little more emphasis on developing skills and actual evaluation mechanisms would be helpful for people.*

(B) *Pace for several sessions was just too fast.*

We needed more time to do activities in class to improve our knowledge of the methods of evaluation, questions, analysis, etc.

Given the breadth of material, additional (optional) sessions may be helpful for agencies that need greater depth on specific topics.

Perhaps some time devoted to strategies for motivating people, team building etc. – stakeholders, co-evaluators, to bolster the ultimate success of the evaluation project.

The second cycle of BEC, where evaluation projects are implemented and more consultations happen, should provide opportunities to address these requests for additional time, applications and support. Care will be taken to monitor this as well during the second cycle.

BEC training 2012 ended smoothly and all teams finished their final session with a clearer sense of how to use evaluative thinking at work and with comprehensive evaluation designs and the instruments and analysis plans to carry them out. The following, however, will deserve ongoing or initial attention for participants:

- Reviewing comments and requests from participants to ensure that where possible they are addressed in future BEC sessions
- Ensuring that participants get support as they analyze real data from their own organizations and successfully learn how to plan for and conduct evaluation data analyses
- Helping participants stay focused on rigorous evaluation of their projects while also managing other organizational demands
- Helping participants summarize findings for external communication and present information to multiple stakeholder groups.
- Supporting efforts to enhance evaluative thinking at participating organizations.

Note that these challenges are very similar to those identified for both the class of 2008 and the class of 2010 and they are challenges that can be addressed during the second cycle of BEC. The Hartford Foundation's interest in developing staff evaluation expertise for its grantees and other area nonprofit organizations was clearly addressed again through the BEC class of 2013 and BEC alumni group 2011-12.

APPENDIX

Summary of Proposed Evaluation Projects
BEC Class of 2013: Spring 2012*

ORGANIZATION & Program	Evaluation Questions
<p>Brain Injury Alliance of Connecticut</p> <p>Brain Injury Services Helpline</p>	<p>EQ1 To what extent do callers value the helpline service?</p> <p>EQ2 To what extent are callers satisfied with the services they receive from the brain injury specialists?</p> <p>EQ3 To what extent do brain injury specialists define the issue and answer the questions of the callers?</p>
<p>Connecticut Landmarks</p> <p>Youth Employment Program at Butler-McCook House</p>	<p>How and to what extent does the Youth Employment Program at the Butler-McCook House & Garden</p> <ul style="list-style-type: none"> a. further the mission of CT Landmarks? b. leverage the museum’s collaborative relationships to offer area high school students an opportunity to develop job skills while gaining an appreciation for the cultural richness of their community c. serve the needs of the Hartford community d. provide important cultural lessons for area teens e. help CT Landmarks attract a diverse audience
<p>Educational Resources for Children, Inc.</p> <p>Out of School Time (OST)</p>	<p>EQ1 What is the community’s perception of ERfC and the services it provides?</p> <p>EQ2 Based on recommendations from the community survey, has the perception of ERfC been changed? How do we promote ERfC to show positive impacts on the community?</p>
<p>Gifts of Love, Inc.</p> <p>GOL Operations</p>	<p>EQ1 How and to what extent are we helping clients become self-sufficient? What are our strengths and weaknesses?</p> <p>EQ2 How and to what extent can we become more involved in the communities we serve?</p>

ORGANIZATION & Program	Evaluation Questions
<p>Immaculate Conception Shelter & Housing Corporation</p> <p>Critical Time Intervention (CTI)</p>	<p>EQ 1 How effective has ICSHC been regarding stabilized housing, connection to community resources, client satisfaction and quality of life?</p> <p>EQ 2 How has the CTI model contributed to project outcomes?</p> <p>EQ 3 Is the CTI model of case management more effective with participants referred from different programs ?(E.G. do clients from the HUD program have different characteristics than Moving- On program clients and does that impact outcome?)</p>
<p>Mutual Housing Association of Greater Hartford</p> <p>Leadership Academy</p>	<p>EQ1 How and to what extent are participants progressing toward desired outcomes?</p> <p>EQ2 What are the participants’ perceptions of the Leadership Academy?</p> <p>EQ3 To what extent did the Leadership Academy attain its goals?</p>
<p>National Conference for Community and Justice</p> <p>Anytown</p>	<p>EQ1 To what extent do ANYTOWN participants (delegates) understand the dynamics of oppression and are able to identify individual, cultural, and institutional oppression when it occurs?</p> <p>EQ2 To what extent do the participants feel positive about their social identifies (both as agent and target) as well as feel connected to the well-being of others and their social identities?</p> <p>EQ3 How effective was NCCJ’s various learning modules in delivering the ANYTOWN curriculum?</p>
<p>Noah Webster House and West Hartford Historical Society</p> <p>A Day of Living History</p>	<p>EQ1 How and to what extent did the museum program meet the teachers’ expectations and curriculum needs?</p> <p>EQ2 What are the program’s strengths and weaknesses and how can we improve the experience?</p> <p>EQ3 How and when do schools determine which programs or field trips will be selected?</p>

ORGANIZATION & Program	Evaluation Questions
<p>Open Hearth Association</p> <p>Transitional Living Program (TLP)</p>	<p>How effective has TLP been? regarding: education, employment, housing, resident satisfaction and recovery support services</p>
<p>The Salvation Army</p> <p>Marshall House</p>	<p>EQ1 How and to what extent is Marshall House achieving its purpose and aligning with the larger mission and vision of The Salvation Army?</p> <p>EQ 2 How and to what extent is Marshall House meeting the immediate needs of its guests and moving them towards stable housing.</p> <p>EQ3 After 38 years of operating Marshall House, what are the lessons learned?</p>
<p>Wadsworth Atheneum Museum of Art</p> <p>Connections Gallery</p>	<p>EQ1 To what extent have we achieved the following important outcomes for visitors during 2012-2013?</p> <ul style="list-style-type: none"> • They learned something new • They understood the theme • They spent comparatively more time in the gallery • They felt engaged in the space <p>EQ2 What have we learned that can be applied to the reinstallation process more broadly?</p>
<p>Women’s League Child Development Center</p>	<p>EQ 1 How and to what extent do members of the Administrative Team support the core work of the organization? What else is needed?</p> <p>EQ 2 How and to what extent is the work of the Administrative Team supported?</p> <ol style="list-style-type: none"> a. through professional development b. through team structure and meetings

* Note: Spring 2012 is the end of the first segment of BEC training. All organizations are in the final stages of designing evaluations to be conducted during 2012-13.

Planned Data Collection Strategies: BEC Class of 2013

ORGANIZATION	SURVEYS	INTERVIEWS	OBSERVATIONS	RECORD REVIEWS
Brain Injury Alliance of Connecticut	✓	✓		
Connecticut Landmarks	✓	✓		✓
Educational Resources for Children, Inc.	✓	✓	✓	✓
Gifts of Love, Inc.	✓			✓
Immaculate Conception Shelter & Housing Corporation	✓			✓
Mutual Housing Assoc. of Greater Hartford	✓	✓		
National Conference for Community and Justice	✓	✓	✓	✓
Noah Webster House	✓	✓	✓	✓
Open Hearth Association	✓	✓		✓
The Salvation Army	✓	✓		✓
Wadsworth Atheneum Museum of Art	✓		✓	✓
Women’s League Child Development Center	✓	✓		

Data Collection Strategies: Alumni Projects 2011-12

ORGANIZATION	PROJECT	Surveys	Interviews	Observation	Record Review
Connecticut Historical Society	Evaluating Free-Choice Audiences	✓	✓	✓	✓
Community Renewal Team	Determining Change Over Time in Community Needs Assessment	✓			✓
Hartford Gay and Lesbian Health Collective	Modifying and Using a New Client Feedback Survey	✓	✓		
Latino Community Services	Analyzing Trends in Intake				✓
YWCA	Assessing the Young Women's Leadership Corps	✓		✓	✓

Project Involvement: All BEC Organizations

Organization	Class	Alumni 08-09	Alumni 09-10	Alumni 10-11	Alumni 11-12
Community Renewal Team	2008	✓	✓	✓	✓
Compass Youth Collaborative	2008				
Families in Crisis	2008	✓	✓	✓	
Family Life Education	2008				
Hands on Hartford (formerly Center City Churches)	2008	✓	✓		
Latino Community Services	2008	✓	✓	✓	✓
MARC, Inc. of Manchester	2008				
Mercy Housing and Shelter	2008				
My Sisters' Place	2008				
Organized Parents Make a Difference	2008				
The Amistad Center	2008				
The Governor's Prevention Partnership	2008				
Aids Project Hartford, Inc.	2010			✓	
Alcohol & Drug Recovery Centers, Inc.	2010				
Community Partners in Action	2010			✓	
Connecticut Historical Society	2010			✓	✓
CT Women's Education and Legal Fund	2010			✓	
Hartford Gay and Lesbian Health Collective	2010			✓	✓
The Children's Museum	2010			✓	
The Connecticut Forum	2010				
YWCA of the Hartford Region, Inc.	2010			✓	✓
The Shelter for Women	2010			*	
Brain Injury Alliance of Connecticut	2013				
Connecticut Landmarks	2013				
Educational Resources for Children, Inc.	2013				
Gifts of Love, Inc.	2013				
Immaculate Conception Shelter & Housing Corporation	2013				
Mutual Housing Assoc. of Greater Hartford	2013				
National Conference for Community and Justice	2013				
Noah Webster House	2013				
Open Hearth Association	2013				
The Salvation Army	2013				
Wadsworth Atheneum Museum of Art	2013				
Women's League Child Development Center	2013				

*This agency closed and therefore was ineligible for the alumni group.