

Bruner Foundation
Rochester, New York

Organization Mission

Organizations That Use Evaluative Thinking Will . . .

- ▶ Develop mission statements specific enough to provide a basis for goals and objectives.
- ▶ Review and revise the mission statement on a scheduled basis (e.g., annually) with input from key stakeholders as appropriate.
- ▶ Regularly assess compatibility between programs and mission.
- ▶ Act on findings of compatibility assessments (in other words, if a program is not compatible with the mission, it is changed or discontinued).



Strategic Planning

Organizations That Use Evaluative Thinking Will . . .

- ▶ Have a formal process for strategic planning.
- ▶ Using evaluative strategies such as interviews and surveys, obtain input from key stakeholders (staff, board, community and clients) about strategic direction where appropriate.
- ▶ Assess activities related to strategic process at least annually and involve key stakeholders (staff, board, community and clients) in assessment where appropriate.
- ▶ Use strategic plans to inform decision-making.



Governance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ The board uses data in defining goals/workplan/structure to develop plans summarizing strategic direction.
- ▶ The board regularly evaluates progress relative to own goals/workplan/structure.
- ▶ The relationship between organization mission and plans for strategic direction are assessed.



Governance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ There is a systematic process and timeline for identifying, recruiting, and electing new board members.
- ▶ Specific expertise needs are identified and used to guide board member recruitment.



Governance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ The board regularly (e.g., annually) evaluates the executive director's performance based on established goals/workplan.
- ▶ The board assesses the organization's progress relative to long-term financial plans.
- ▶ The board assesses the organization's progress relative to program evaluation results.



Finance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ Systems in place to provide appropriate financial information to staff and board members are monitored to ensure they inform sound financial decisions.
- ▶ A comprehensive operating budget which includes costs for all programs, management and fundraising, and identifies sources of all funding is developed and reviewed annually.
- ▶ Unit costs of programs and services are monitored through the documentation of staff time and direct expenses.



Finance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ Financial status is assessed regularly (at least quarterly) by board and executive leaders.
- ▶ Year-end revenues and expenses are periodically forecasted to inform sound management decisions.
- ▶ Financial statements are prepared on a budget versus actual and/or comparative basis to achieve a better understanding of finances.



Finance and Evaluative Thinking

In Organizations That Think Evaluatively . . .

- ▶ There is a review process to monitor whether appropriate and accurate financial information, whether from a contracted service or internal processing is being received.
- ▶ Capital needs are reviewed annually.
- ▶ The organization has a plan identifying actions to take in the event of a reduction or loss in funding.



Leadership

Leaders in Organizations That Use Evaluative Thinking Will . . .

- ▶ Support and value program evaluation and evaluative thinking. Use evaluation findings in decision-making.
- ▶ Include attention to evaluation as an important part of a succession plan. New leaders will be expected to value and be knowledgeable about evaluation.
- ▶ Educate staff about the value of evaluation and how to participate effectively in evaluation efforts.
- ▶ Motivate staff to regularly use specific evaluation strategies.
- ▶ Modify the organizational structure as needed to embrace change in response to evaluation findings.



Leadership

Leaders in Organizations That Use Evaluative Thinking Will Also . . .

- ▶ Foster use of technology to support evaluation and evaluative thinking.
- ▶ Use data to set staff goals and evaluate staff performance.
- ▶ Use data to make staffing decisions (e.g., to decide which staff work on which projects, which staff are eligible for promotions or advancements, or need more assistance).
- ▶ Include attention to evaluation in all management level succession planning. Managers should be expected to value and where possible be knowledgeable about evaluation.

Fund Raising/Fund Development

Organization's That Think Evaluatively . . .

- ▶ Conduct research on potential fund development opportunities (grants, contracts) and assess which to pursue.
- ▶ Develop a written fund development plan that clarifies which grants and contracts will be pursued. Assess whether the plan is being followed and why changes and exceptions are made. Revise the plan as needed based on assessments.
- ▶ Involve program staff in proposal writing, especially sections on program design and outcomes on which the program will be assessed.
- ▶ Assess the costs and benefits for fund raising events and activities.



Evaluation and Evaluative Thinking

Organizations That Use Evaluative Thinking Will

- ▶ Regularly conduct evaluations that include attention to characteristics, activities and outcomes of selected programs.
- ▶ Involve program staff, organization leaders and clients (as appropriate) in developing/revising program evaluation plans; collecting and analyzing program evaluation data.
- ▶ Share results of program evaluations including findings about client outcomes, as appropriate, with leaders, staff, clients, board members and funders.
- ▶ Use results of program evaluation to drive continuous improvement of programs.



Evaluation and Evaluative Thinking

Organizations That Use Evaluative Thinking Will . . .

- ▶ Insure that there are key staff with evaluation expertise to address the organization's evaluation needs and that there are staff members whose jobs or components of their jobs are dedicated to evaluation.
- ▶ Hire evaluation consultants when needed.
- ▶ Provide or obtain training in evaluation for program staff members and make sure that the training is current, well-delivered, and provided for enough staff members to insure that evaluation use is a standard practice.



Client Interaction

In Organizations That Think Evaluatively . . .

- ▶ Client needs assessments are conducted regularly, and client services are designed in response to determined needs.
- ▶ Client satisfaction is regularly assessed and the results of client outcome assessments and client satisfaction are used in development of new programs.



Program Development

Organizations That Use Evaluative Thinking Will . . .

- ▶ Identify gaps in community services before planning new programs.
- ▶ Incorporate findings from program evaluation into the program planning process.
- ▶ Involve multiple stakeholders in developing and revising program plans.
- ▶ Develop written program plans including a logical formulation of each program.
- ▶ Follow program plans where possible and insure that there are strategies in place to modify program plans if needed.



Communications and Marketing

Organizations That Use Evaluative Thinking Will . . .

- ▶ Have a marketing and communications plan. The plan will be linked to the organization's strategic plan and it will be used to help the organization achieve its mission.
- ▶ Involve multiple stakeholders including staff and board members, and technical assistance providers as needed to develop and assess the marketing and communications plan.
- ▶ Assess the effectiveness of the organization's marketing and communication plan (i.e., determine whether an accurate message is getting out and whether delivery of the message is furthering the mission of the organization.)



Technology Acquisition & Training

In Organizations That Think Evaluatively . . .

- ▶ Assessment processes will be in place to make decisions about technology maintenance, upgrades and acquisition.
- ▶ Technology systems include software that can be used to manage and analyze evaluation data (e.g., Excel, SPSS).
- ▶ Technology systems provide data to evaluate client outcomes.
- ▶ Technology systems provide data to evaluate organizational management.
- ▶ Technology systems are regularly assessed to see if they support evaluation.
- ▶ Staff technology needs are regularly assessed.



Staff Development

Organizations That Use Evaluative Thinking Will . . .

- ▶ Conduct a formal staff development needs assessment annually.
- ▶ Develop a plan for staff development, based on needs assessment data.
- ▶ Evaluate the staff development plan.
- ▶ Provide opportunities for staff to assess staff development training sessions.
- ▶ Use results of staff training assessments to influence future staff development.



Human Resources

Organizations That Use Evaluative Thinking Will

- ▶ Have an established personnel performance review process.
- ▶ Use performance reviews to provide feedback relative to performance expectations.
- ▶ Collect and update information on credentials, training and cultural competencies of staff; and then use the results to recruit, hire and train culturally competent staff.
- ▶ Conduct regular (e.g., annual or biannual) staff satisfaction surveys, and use the results to inform modification of policies and procedures.



Business Venture Development

Organizations That Use Evaluative Thinking Will . . .

- ▶ Systematically identify gaps in community service.
- ▶ Assess whether they have the capacity to bring in new types of business.
- ▶ Research new business venture opportunities.
- ▶ Base new venture development on capacity findings, results of gap studies and business venture development research.

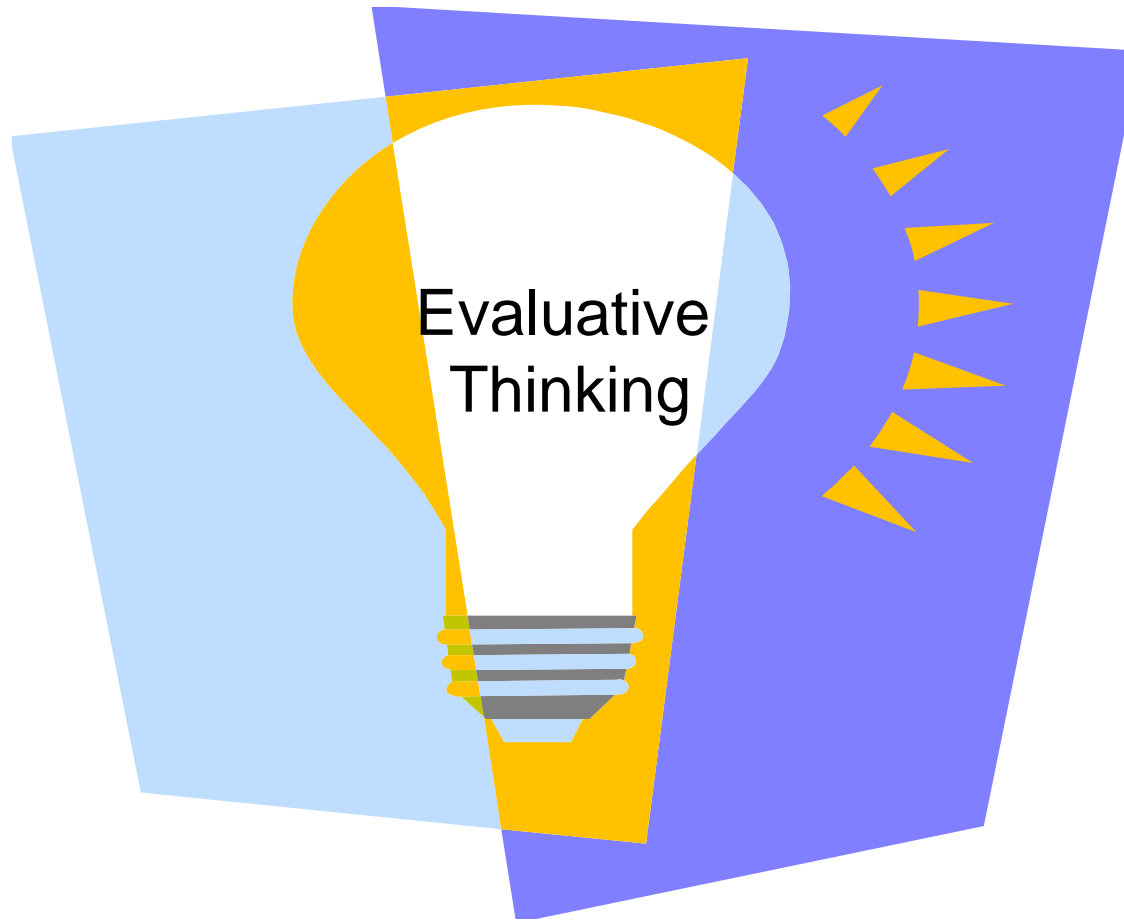


Alliances and Collaboration

Organizations That Use Evaluative Thinking Will . . .

- ▶ Evaluate existing partnerships/alliances/collaborations based on organization mission and strategic plans.
- ▶ Identify additionally needed partnerships/alliances/collaborations.
- ▶ Regularly assess partnerships/alliances/collaborations in which the organization is involved to determine if they are functioning effectively and continue to meet organization mission and strategic direction





Evaluative
Thinking