

Evaluative Thinking Assessment Report

Prepared For:
FAMILY SERVICES, Inc.

Prepared on:
6/30/2011

EXAMPLE

Note this report is fictitious. The organization and all associated data, summary information and planning projections are fabricated to exemplify use of the Bruner Foundation Evaluative Thinking Assessment Tool.

Evaluative Thinking is a type of reflective practice that incorporates systematically collected data to inform organizational decisions and other actions.

INTRODUCTION

The Evaluative Thinking Assessment Tool was created in 2005 by Bruner Foundation evaluation consultants and representatives from 12 non-profit organizations in 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 [Evaluative Thinking](#) pages of the Bruner Foundation Website. In 2007, the tool was automated and in 2010-11 it was updated again after additional study.

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 strategies to act on evaluation findings.

The idea for formatting this tool was inspired by the Marguerite Casey Foundation Organizational Capacity Assessment Tool which is a derivative product of the Capacity Assessment Tool created by McKinsey and Company for Venture Philanthropy Partners (www.vpppartners.org), and published in *Effective Capacity Building in Nonprofit Organizations* (2001). The content contained herein was developed and field tested by members of the Rochester Effectiveness Partnership in Rochester New York as part of a project developed and supported by the Bruner Foundation (2004-05). It was modified again in 2007 by participants in the Building Evaluation Capacity (BEC) Program, Hartford, CT, and through the E-Tip project, 2010-11.

Using the Modified Evaluative Thinking Assessment Tool

This modified version of the Evaluative Thinking Assessment tool was designed to capture leader perceptions about Evaluative Thinking in a critical subset of organizational 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, the respondent is asked to report, whether an indicator of evaluative thinking is present or not using codes shown in drop down boxes next to each indicator.

It is expected that summarizing the organization's best projections about evaluative thinking will help the organization recognize whether and to what extent it is incorporating specific evaluative thinking strategies into its work, and in which organizational areas. It will also help the organization prioritize strategy changes related to evaluative thinking.

Those completing the tool are advised to complete all 15 worksheets in the instrument and then view the summary table and summary graph that are generated automatically. Summaries and all pages in the Evaluative Thinking Assessment workbook are set to print if desired and users of the tool are encouraged to generate their own Evaluative Thinking Assessment Report from these worksheets. (Please see the actual tool for remaining detailed instructions for its use.)

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. 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. A final Action Planning Guide is included with the tool to facilitate use of evaluative thinking assessment findings.

About this Report Example

The following pages include a copy of a summary table of Evaluative Thinking Assessment Scores by organizational capacity area, the corresponding Evaluative Thinking Score Chart, and a sample version of a completed Action Planning Guide. Select completed worksheets for six score areas are appended. **The organization and all associated data, summary information and planning projections were fabricated to exemplify use of the Bruner Foundation Evaluative Thinking Assessment Tool.** Please be sure to visit the [Resources and Tools](#) pages of the Bruner Foundation website to access and use the actual tool, and to see a listing of all indicators of Evaluative Thinking.

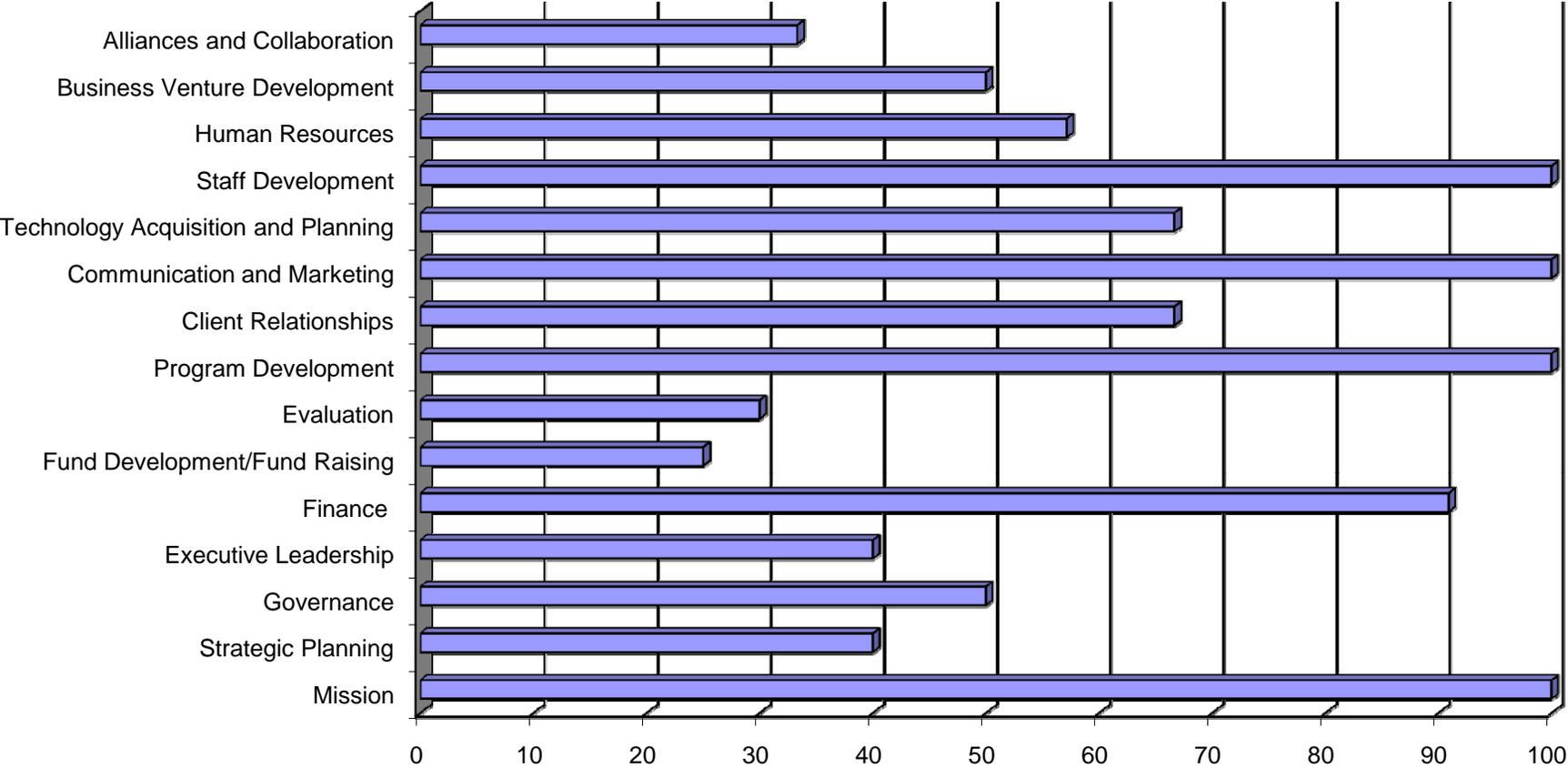
Bruner Foundation
Evaluative Thinking Assessment Scores, by Organizational Capacity Area

FOR: 6/30/2011 Family Services, Inc

	<i>Organizational Capacity Area</i>	Capacity Score* <small>Will Calculate Automatically</small>	Action Planning** <small>(Select from list)</small>
1	Mission	100	No action required in this area
2	Strategic Planning	40	Action required see priorities
3	Governance	50	Action suggested see priorities
4	Finance	91	No action required in this area
5	Leadership	40	Action required see priorities
6	Fund Development/Fund Raising	25	Action required see priorities
7	Evaluation	30	Action required see priorities
8	Program Development	100	No action required in this area
9	Client Relationships	67	No action required in this area
10	Communication and Marketing	100	No action required in this area
11	Technology Acquisition and Planning	67	No action required in this area
12	Staff Development	100	No action required in this area
13	Human Resources	57	Action suggested see priorities
14	Business Venture Development	50	Action suggested see priorities
15	Alliances and Collaboration	33	Action required see priorities

Please note all results displayed here are fabricated. This is a Sample Report for a fictitious organization.

Evaluative Thinking Scores



	MISSION	STRATEGIC PLANNING
ORGANIZATION SCORE	100	40
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	NO - differences described below	NO - differences described below
Describe differences	We thought this might be an area where more work was needed, but through the assessment learned that we have infused a lot of evaluative thinking regarding our mission.	We thought this area would be stronger. More work to do here.
PRIORITIES/PLANNED ACTIONS	None Needed	Top priority -- assess our strategic process this year. Next year: Use evaluative strategies to obtain input from staff and board about our strategic direction, and involve other stakeholders in our strategic process.

	GOVERNANCE	FINANCE
ORGANIZATION SCORE	50	91
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	NO - differences described below	YES
Describe differences	Same as for strategic planning -- we thought we were more evaluative here.	
PRIORITIES/PLANNED ACTIONS	<p>Three top priorities in this area -- for this year. 1) Board needs to use evaluation data in defining goals and developing plans summarizing strategic direction. 2) The relationship between Family Services' mission and our plans for strategic direction need to be assessed (we need to make sure everything we are planning to do fits with our mission). 3) The board needs to incorporate use of evaluation results into its assessment of Family Services progress (we've been relying only on financial information and client satisfaction for too long).</p>	<p>Although we clearly have a lot of evaluative thinking in this area, we do need to prepare our financial statements on a budget versus actual basis to achieve a better understanding of our finances.</p>

	LEADERSHIP	FUND RAISING/DEVELOPMENT
ORGANIZATION SCORE	40	25
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	NO - differences described below	YES
Describe differences	We thought this would be higher too given our leaders' commitment to evaluation.	No surprises here
PRIORITIES/PLANNED ACTIONS	Lots to do in this area. We need to ensure that Executive Leaders (that means the ED and the COO) are using evaluation findings in their decision making, that there is a succession plan for them that includes attention to evaluation and that they are educating others in the organization about evaluation. We also have to explore ways to motivate staff to use evaluation and we have to improve our use of technology along those lines. We also have to make sure that staffing decisions get made based on real data (not just seniority).	We need to get much more diligent about researching potential fund development opportunities and assessing which to pursue. We also need a written fund development plan which clarifies what we are going after. If there is time, we should assess the costs and benefits for fund raising events or start setting up a process that will allow us to do that next fiscal year.

	EVALUATION	PROGRAM DEVELOPMENT
ORGANIZATION SCORE	30	100
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	NO - differences described below	YES
Describe differences	We knew we had a lot of work to do here.	This area is in relatively good shape.
PRIORITIES/PLANNED ACTIONS	We plan to address all of the following: 1) Involve staff, leaders and clients in developing and revising plans for evaluation (we need to take a proactive approach for several key programs). 2) Involve leadership and staff in collection and analysis of program evaluation data. 3) We need to keep sending staff to the Evaluation Institute for more training so that we standardize evaluation practices here. 4) All of the evaluations we undertake this year have to focus on characteristics and activities as well as outcomes of the programs -- no short cuts. 5) We need to USE our evaluation findings to inform program improvements.	

	CLIENT RELATIONSHIPS	COMMUNICATION AND MARKETING
ORGANIZATION SCORE	67	100
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	NO - differences described below	YES
Describe differences	We actually expected this to be worse. More evaluative thinking in this area than predicted.	
PRIORITIES/PLANNED ACTIONS	We need to make sure that client outcomes are part of our evaluation work (not just service delivery), and we need to use the results of those outcomes assessments when we are developing or revising our programs.	

TECHNOLOGY ACQUISITION AND PLANNING STAFF DEVELOPMENT

ORGANIZATION SCORE	67	100
<p>DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?</p>	NO - differences described below	YES
<p>Describe differences</p>	<p>We thought this would be worse too, but in fact most of our decisions have been pretty evaluative in this area.</p>	
<p>PRIORITIES/PLANNED ACTIONS</p>	<p>While we can't deal with it this year, soon we need to assess our technology systems to see if they can be more supportive of our evaluation work, and then we need to invest in some software to ensure that happens.</p>	

	HUMAN RESOURCES	BUSINESS VENTURE DEVELOPMENT
ORGANIZATION SCORE	57	50
DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?	YES	NO - differences described below
Describe differences		We were not sure how this one was going. Interesting to see that we both do this some and are evaluative about it in some ways.
PRIORITIES/PLANNED ACTIONS	We need to use the results of our staff satisfaction surveys to inform modification of policies and procedures. Though it's a lower priority, soon we also need to update information on credentials, training and cultural competencies for all staff and then use the information to recruit new staff.	Not planning to pursue any changes in this area this year.

ALLIANCES AND COLLABORATION

<p>ORGANIZATION SCORE</p>	<p>33</p>
<p>DO YOUR SCORES MATCH YOUR PERCEPTION OF EVALUATIVE THINKING IN YOUR ORGANIZATION?</p>	<p>YES</p>
<p>Describe differences</p>	<p>Not surprising.</p>
<p>PRIORITIES/PLANNED ACTIONS</p>	<p>Not planning to pursue any changes in this area this year.</p>

ATTACHMENTS

Examples of Completed Worksheets

Finance

Leadership

Evaluation

Program Development

Client Relationships

Technology Acquisition and Planning

FINANCE			
		Assessment	Priority
a.	The organization has systems in place to provide appropriate financial information to staff and board members	1	
b.	The organization monitors its financial information systems to ensure they inform sound financial decisions	1	
c.	The organization annually develops a comprehensive operating budget which includes costs for all programs, management and fundraising and identifies sources of all funding	1	
d.	The organization annually reviews the comprehensive budget which includes costs for all programs, management and fundraising and identifies sources of all funding	1	
e.	The organization monitors unit costs of programs and services through the documentation of staff time and direct expenses	1	
f.	Financial status of organization is assessed regularly (at least quarterly) by board and executive leaders	1	
g.	The organization prepares financial statements on a budget versus actual and/or comparative basis to achieve a better understanding of finances	0	This is a high priority this year
h.	The organization periodically forecasts year-end revenues and expenses to inform sound management decisions	1	
i.	The organization has a review process to monitor whether they are receiving appropriate and accurate financial information whether from a contracted service or internal processing	1	
j.	Capital needs are reviewed at least annually	1	
k.	The organization has established a plan identifying actions to take in the event of a reduction or loss in funding	1	
	Comments:		
	<i>Please proceed to the next Worksheet</i>		

LEADERSHIP

		Assessment	Priority
a.	Executive leaders support and value program evaluation and evaluative thinking	1	
b.	Executive leaders use evaluation findings in decision-making.	0	This is a high priority this year
c.	Plans for executive leadership succession include attention to evaluation – new executive leaders are expected to value and be knowledgeable about evaluation	0	This is a high priority this year
d.	Executive leaders educate staff about the value of evaluation and how to participate effectively in evaluation efforts	0	This is a high priority this year
e.	Executive leaders motivate staff to regularly use specific evaluation strategies	0	This is a high priority this year
f.	Executive leaders modify the organizational structure as needed to embrace change in response to evaluation findings	1	
g.	Executive leaders foster use of technology to support evaluation and evaluative thinking	0	This is a high priority this year
h.	Management uses data to set staff goals and evaluate staff performance	1	
i.	Plans for management succession include attention to evaluation – new managers are expected to value evaluation and where possible are knowledgeable about evaluation	1	
j.	Staffing decisions (e.g., to decide which staff work on which projects, which staff are eligible for promotions or advancements, or need more assistance) are based on data	0	This is a high priority this year
Comments:			

EVALUATION			
		Assessment	Priority
a.	The organization involves program staff, organizational leaders and clients (as appropriate) in developing/revising program evaluation plans	0	This is a high priority this year
b.	The organization involves program staff, organizational leaders and clients (as appropriate) in collecting program evaluation data.	1	
c.	The organization involves program staff, organizational leaders and clients (as appropriate) in collecting analyzing program evaluation data.	0	This is a high priority this year
d.	The organization insures that there are key staff with evaluation expertise to address the organization's evaluation needs	0	This is a lower priority
e.	The organization insures that there are staff members whose jobs or components of their jobs are dedicated to evaluation	0	This is a lower priority
f.	The organization provides (or obtains) training in evaluation for program staff members and makes sure that the training is current, well-delivered, and provided for enough staff members to insure that evaluation use is a standard practice	0	This is a high priority this year
g.	The organization hires evaluation consultants when needed	1	
h.	Evaluations that include attention to characteristics, activities and program and client outcomes are regularly conducted for organization programs	0	This is a high priority this year
i.	Results of program evaluations including findings about client outcomes, as appropriate are shared with leaders, staff, clients, board members and funders	1	
j.	Results of program evaluation drive continuous improvement of programs	0	This is a high priority this year
Comments:			
<i>Please proceed to the next worksheet</i>			

PROGRAM DEVELOPMENT			Assessment	Priority
a.	The organization identifies gaps in community services before planning new programs		1	
b.	Findings from program evaluation are incorporated into the program planning process		1	
c.	Multiple stakeholders are involved in developing/revising program plans		1	
d.	Program plans are followed where possible and there are strategies in place to modify program plans if needed		1	
e.	Each program has a written program plan including a logical formulation		1	
	Comments:		100	
<i>Please proceed to the next worksheet</i>				

CLIENT RELATIONSHIPS

		Assessment	Priority
a.	Client needs assessments are conducted regularly	1	
b.	Client services are designed in response to determined needs	1	
c.	Client satisfaction is regularly assessed.	1	
d.	Client outcomes are regularly assessed.	0	This is a high priority this year
	Results of client satisfaction assessments are used in developing new programs.	1	
e.	Results of client outcome assessments a are used in developing new programs.	0	This is a high priority this year
	Comments:		
<i>Please proceed to the next Worksheet</i>			

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)	0	This is a lower priority
c.	Technology systems provide data to evaluate client outcomes	1	
d.	Technology systems provide data to evaluate organizational management	1	
e.	Technology systems are regularly assessed to see if they support evaluation	0	This is a lower priority
f.	Staff technology needs are regularly assessed	1	
Comments:			
<i>Please proceed to the next worksheet</i>			