



In the short term, anchoring really has given us the opportunity to see service gaps in the design of our programs. Our coordinators now have an awareness of why evaluation is so important!

Evaluation Anchoring Project,  
Training Participant

## **ANCHORING EVALUATIVE CAPACITY PROJECT**

### **SUMMARY REPORT FY 2012**

Submitted To:  
**BRUNER FOUNDATION  
EFFECTIVENESS INITIATIVES**

Submitted By:  
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## ANCHORING EVALUATIVE CAPACITY PROJECT OVERVIEW

The Anchoring Evaluative Capacity project (Anchoring) was conducted in Hartford, Connecticut spring 2011 through spring 2012. The project was devised to help multiple staff<sup>1</sup> of select organizations refresh or learn new evaluation-related skills and to enhance organization-wide evaluative thinking. It was also conducted to test out evaluation training materials and strategies for use with agency-wide training, so that this option could be added to the evaluation capacity building work of the Bruner Foundation and *Evaluation Services*. Hartford Gay and Lesbian Health Collective (HGLHC), Latino Community Services (LCS) and the YWCA Hartford Region, all past Hartford Foundation for Public Giving grantees, alumni BEC<sup>2</sup> participants, and stable Hartford-area nonprofits were invited to participate.

### History and Design

The Anchoring project was independently developed as an ancillary program for BEC alumni (see note 1 below for more details on BEC), with input from specific alumni participants (especially Bello and Ullman, Executive Directors of LCS and YWCA) during the summer of 2011. The resulting “Anchoring” project was jointly supported by Anita Baker/*Evaluation Services*, the Bruner Foundation, and the Hartford Foundation for Public Giving. All BEC alumni were invited to participate and HGLHC, LCS, and the YWCA elected to do so. Anchoring project staff members from the three agencies, attended three structured evaluation training sessions at their own facilities and conducted an agency-specific analytical project. (Access more information here about the Hartford Foundation for Public Giving [BEC](#) project.)



[www.hglhc.org](http://www.hglhc.org)

HGLHC provides medical and dental services, education and support groups, and information and referral services tailored to the lesbian, gay, bisexual, and transgender (LGBT) communities, serving clients of all genders and gender identities, sexual orientations, ages and ethnicities.



[www.lcs-ct.org](http://www.lcs-ct.org)

LCS, Inc. is the only Latino-led, Latino focused agency in Hartford. LCS offers comprehensive HIV prevention and care services to people at risk of infection and to those already living with HIV/AIDS.

**eliminating racism  
empowering women**  
ywca

hartford region

[www.ywcahartford.org](http://www.ywcahartford.org)

YWCA Hartford Region is a not-for-profit membership association. YWCA serves Greater Hartford with programs, including early learning and school-age childcare; emergency, transitional and permanent supportive housing; child abuse prevention; youth leadership development; racial justice awareness; and financial literacy education.

<sup>1</sup> Between 7 and 15 key staff, i.e., those involved directly with service delivery at the organization, some of whom had been involved with BEC previously, many who had not, were identified by their Executive Directors to participate.

<sup>2</sup> **The Building Evaluation Capacity (BEC) Project** was designed to provide comprehensive, long-term training and coaching to increase both evaluation capacity and use of evaluative thinking for participating organizations. The project was initiated in the fall of 2006 by the **Hartford Foundation for Public Giving’s Nonprofit Support Program (NSP)** and is currently providing an 18- month training cycle to its third cohort of nonprofit organizations. Each group sends small teams to participate in the extensive evaluation-focused training and all are invited to become alumni and continue studying for 1-year periods after the 18-month cycle has ended. Key staff from HGLHC, LCS and YWCA each participated in comprehensive training and at least 2 years of alumni study.

The Anchoring project included two components, basic evaluation training and guided data analysis for a specific agency program. The first part of the training, delivered through two initial sessions focused on evaluation logic, design, data collection and evaluative thinking. The final part of the training focused on data analysis and use of analytic tools. Each organization selected one program or program component about which to collect data and an appropriate tool to analyze those data.

<b>Figure 1: Anchoring Project ANALYSIS PROJECTS AND STRATEGIES</b>		
<b>Organization</b>	<b>Program/Component</b>	<b>Analytic Tool</b>
HGLHC	Customer Satisfaction	SURVEY MONKEY (e-survey)
LCS	Program Intake 2008 - 2012	SPSS
YWCA	Young Women's Leadership	EXCEL

Through the Anchoring Project we hoped to determine:

- if the streamlined but agency-specific training would enhance participants' knowledge about evaluation and promote evaluative thinking.
- if trainees would apply what they learned,
- if the guided analytic work and other examples would help agency staff extend evaluation use beyond just those who had been in the comprehensive BEC training program.

Lastly we were also interested to know whether agency officials perceived the project as sufficient to help support their evaluation needs and what else might be needed to provide support. Anita Baker, long-term consultant to both the Bruner Foundation and the Hartford Foundation for Public Giving delivered all training and consultation services, and developed this final project summary (final assessment data were collected through independently administered surveys and interviews).<sup>3</sup>

### **Evaluation Training**

The training, as stated above, was delivered through three two-hour sessions focused on the following topics. Agendas and all session handouts are available for review upon request and supporting materials (slides and activity handouts) are posted on the Bruner Foundation and [Evaluation Services websites](#).

- **Session 1: Evaluation Basics** – definitions, evaluation logic (outcomes, indicators, targets), evaluation questions, designs, purposes and stakeholders.
- **Session 2: Evaluation Data Collection**, – overview, interviews, survey development and administration, observations, record review protocol development and analysis planning.
- **Session 3: Analyzing and Reporting About Evaluation.**

<sup>3</sup> At the conclusion of the project (spring 2012) final interviews were conducted with participating organization leaders and representatives from the Bruner Foundation and Hartford Foundation for Public Giving by an independent evaluator. Final survey data were collected via an electronic survey administered by an external consultant 3 months post project (summer '12). Anchoring Evaluative Capacity, Summary Memo, September 2012 2

The first two sessions included a combination of lecture-style content delivery followed by hands-on activities showing application of session topics. The final session was a fully hands-on data analysis activity (see Figure 1, previous). Examples from similar programs and actual organization data were used at all sessions.

## **ANCHORING PROJECT RESULTS**

As stated previously, assessment data regarding the Anchoring Project were collected via follow-up surveys with key staff from each of the participating organizations, and interviews with organization leaders. All assessment data were collected after the final training session: within one month for interviews, and three months later for survey responses.

- Interviews with key organization staff were conducted with Linda Estabrook (ED) and Jamie Bassell from HGLHC, Yvette Bello (ED) and Fernando Morales (Deputy Director) from LCS, and Deborah Ullman (ED) from the YWCA.
- Surveys were conducted with 4 of 7 key staff members from HGLHC, 12 of 15 key staff members from LCS and 7 of 9 key staff members from YWCA (total number of respondents = 23).
- Other key informants included Beth Bruner, Bruner Foundation; Amy Studwell and Annmarie Riemer, Hartford Foundation for Public Giving; and Ann Marie Cook, Lifespan, Rochester, New York (participant from the related Evaluation Support Project).

All feedback was positive reinforcing both the fit of the project for the participating organizations and the value they placed on the assistance provided.

### **Training Assessment**

Through the interviews and surveys, respondents were asked to provide feedback regarding the training overall and about training content, materials and presentation. Respondents were encouraged to provide specific examples to illustrate their answers, as appropriate.

#### **Feedback about the Training**

A key goal of the Anchoring Project was to help staff at each organization refresh or learn new skills. By their own consistent reports, the training provided the needed assistance and it was used. Participants were very satisfied with the training, but more importantly they applied it to their everyday work. Specific skills were enhanced and important perceptions about the value and applicability of evaluation were changed. Specific findings included the following.

- All 23 respondents to the survey indicated the evaluation training was worthwhile to their agency overall, including 13 respondents (57%) who indicated it was *very worthwhile*.
- All 23 respondents to the survey indicated the evaluation training was worthwhile to them personally, including 8 (a little over one-third) who indicated it was *very worthwhile*.
- All 23 respondents reported the training helped them refresh their evaluation skills, including 9 who said it did so *a great deal* and 14 who said it did so at least *somewhat*.

When asked to clarify, participants offered specific examples of how the training supported their skills. For instance, one participant stated: *“The refresher course reminded me of the benefits of building evaluation capacity as well as some of the finer details to effectively analyze data.”* Another participant indicated that the presentation of *“information and terminology used in the evaluation field was very helpful.”* That same participant stated further that the training about the *“importance of measuring outcomes”* was also very helpful as *“funders are asking (nonprofit organizations) not just to (provide services to) the community but also to demonstrate effectiveness of programs.”*

Still others offered examples including specific references to evaluation use. One participant reported *“I learned about different data gathering strategies and the different data types that can be used when conducting an evaluation. Based on this I started the second survey collection for my department.”* Another commented that *“I learned what is possible to achieve in evaluation and the resources and tools available to conduct good evaluation.”* Participants thought that the training offered strategies and information that could readily be put into action, including the following example.

*I personally feel that it was worthwhile because I could utilize and share what I learned to implement a support group to help others. I know what questions to ask and how to provide feedback to said individuals.*

Participants also clarified that the sessions included both information that was new to them and use of strategies they were already familiar with. For example, one respondent commented, *“the sessions helped me understand and opened up new possibilities that evaluation can provide. They re-emphasized the importance of data collection and use.”* Another pointed out that she/he *“learned what is possible to achieve and what tools and resources are available.”* These comments were made a few to several months after the training took place, after participants had had an opportunity to use their newly developed or upgraded skills.<sup>4</sup>

Participants also reported that the Anchoring Project led them to change their thinking about program evaluation overall.

- About three-quarters (17 of 23 respondents) indicated that participating in the Anchoring Project caused them to change their thinking about program evaluation, including 6 participants who said it did so *a great deal*.

Participants offered examples of how their thinking had changed as a result of their participation, including the clarification, *“...evaluation is vital to show change in behavior, and attitudes in our interventions.”* Another participant suggested that the training helped her/him incorporate evaluative thinking into program planning and reporting.

*It reinforced how I approach opportunities to evaluate program activities. When trying to explain a program goal or objective, I often think about the basics of evaluation and question myself about the whole data collection and analysis process. What questions am I trying to answer and what data do I need?*

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<sup>4</sup> Sessions one and two were conducted roughly 3 to 6 weeks apart. Since it was dependent on project completion, the third session took place after about 8 months at HGLHC, after 3 months at LCS and about 6 weeks after the 2<sup>nd</sup> session at YWCA, right as an annual project was ending.

Another participant reflected on how the training offered her/him a new way to look at existing programs evaluatively with growth and innovation in mind. Further, leaders from the three organizations clarified that for some participants the training was a refresher, but for others it was new. They pointed out that the training brought both groups of staff together to think about evaluation. Their reflections on the three sessions and on how they were being received by staff were particularly telling.

- *Getting everyone using the same terminology. What is data? What is evaluation? Staff were taken aback at some of the gaps in our data. We had been dumping data into Excel, but once we took on analysis of it we could see where clients were being referred and whether they were maintaining their health outcomes. We could also see that some programs were not referring and that made us really question what is happening in our intake process.*
- *This was a 'two-for-one' effort: we got professional development for our staff, but it was also how we got to the ultimate goal of measuring our impact with clients. And we are really seeing an impact on how we measure programs.*

### **Training Content**

Feedback about training content was equally positive and illuminating. All respondents to the survey indicated the content of each of the three sessions was valuable to them **in their current work**, stating that the content was either *important* or *somewhat important*. Each agency attended the Basic Training and Data Collection sessions, and then each agency had a third session with a customized topic about Data Analysis. Leaders at the organizations were especially clear that Anchoring was effective because it involved multiple staff members with specific program responsibilities (including those who had not previously been part of evaluation training), and was conducted in-house, and focused on agency-specific information. No respondent indicated that any part of the training was *un-important*.

- A total of 19 of the 22 participants who attended Basic Training deemed it to be *important*.
- A total of 20 of the 22 participants who attended the Data Collection session indicated the content was *important*.
- A total of 18 of 20 participants who attended the final session on Data Analysis thought the session was important.

Two of the three organization executive directors also provided specific feedback regarding the training content and delivery.

*It would be too time consuming to do something like BEC [comprehensive 18 month training] for all staff...we have 27 staff that we employ. The Anchoring project needed to happen **here**.*

*We chose to participate in Anchoring because we were doing a number of things differently. Any time we're designing new programs – we could get lost in the data without an analysis plan. [Anchoring] really helped me show staff that we need to focus our data collection on what we are trying to change in our programs. We would not be able to send 8 staffers out for BEC training. When we're here at Anchoring, we're all YWCA. We can encourage people who want to dismiss the importance of evaluation, to stay with it.*

### **Materials and Presentation**

Participants provided very positive feedback regarding the sessions and materials. No one rated any component of the training as *poor*. As a result, these materials are being posted on the Bruner Foundation and Evaluation Services websites.

- 20 out of 22 participants who answered rated the slides for the sessions positively including 15 who indicated they were *very good* and 5 who reported they were *good*.
- Similarly, a total of 12 of 22 participants who answered indicated the handouts were *very good*, and 9 said they were *good*.
- A total of 12 of the 23 participants agreed the activities were *very good* and 10 rated them as *good*. Further, one participant clarified that “*The activities help solidify how and why we strive to build our evaluation capacity. Using examples from our programs in these activities makes learning more practical.*”
- All participants who answered rated the delivery of the sessions positively (most – 14 of 22 respondents who answered – indicated it was *very good*), and most (12 of 20 who answered) indicated the delivery of the activities was *very good* as well. Only one participant rated these both as *fair*. No one rated the delivery of sessions or activities as *poor*. Additionally all participants indicated the combination of time spent in formal presentations, discussions and activities was *about right*.
- Interestingly, while almost all participants indicated the number and length of the sessions was about right, two participants reported the sessions were *not long enough*, and four participants indicated there were *not enough* of the sessions and another suggested additional work: “*There is so much information to learn that we should have assignments and then come back to share them so that we can make sure we are applying what we learned.*” One participant stated there was “*too much information to really sink in in a short period of time. We need more time with real life examples.*”

Participants in the training also shared several requests, including a few for additional refresher courses, one request for more information on “framing evaluation questions,” and one for advanced material about “*evaluation tools - like how to phrase the questions and developing accurate measuring scales.*”

The one critique shared by four participants (two at LCS and two at YWCA) was that the timing between the sessions was too long. Note however that the delay between the sessions at some agencies was not purposeful, rather the result of training schedule availability. This complication is difficult to avoid. Most (18 of 23 respondents) said the time between sessions was *just right* and one further clarified that one month between sessions was a good amount of time—any longer and she/he believed the lessons might “*start to fade.*”

## **Final Feedback from Participants**

Through the surveys, again staff from the agencies were clear that participating in the Anchoring Project had helped them with specific and potentially lasting evaluation skills.

- All participants indicated participation will help them commission better evaluations (13 of the 20 who could use this skill said it has helped *a lot*).
- All participants indicated participation has helped them do better evaluations of their own programs (12 of 20 said it has helped *a lot*).
- And all who answered said the project had helped them use evaluative thinking skills in multiple aspects of their work (16 of 22 said it helped *a lot*).

Additionally, all participants indicated that what they learned through the Evaluation Support Project was helping them be more evaluative in their regular work. Specifically:

- All 19 participants who could answer the question said it was helping them to ask key questions (3 said they didn't have any need to do this yet).
- Almost all participants (17 of 18) said Anchoring had helped them determine data they need to answer questions related to their work (4 said they didn't have any need to do this yet).
- Almost all participants (14 of 16) said it helped them gather data in systematic ways (5 said they didn't have any need to do this yet and 1 person did not answer the question).
- Almost all participants (16 of 18) said it helped them analyze data and share results (4 said they didn't have any need to do this yet).
- Almost all participants (15 of 16) said it helped them develop strategies to act on findings (6 said they didn't have any need to do this yet)

Staff at each agency who participated in the training could also give specific examples of changes in thinking or practice they had made as a result of the Anchoring Project. Several participants shared specific evaluation strategies they have changed or plan to change as a result of the trainings:

- *I make sure that my data is shared with my funders, I also include staff in the data collection and show them how it is important.*
- *I learned from the evaluation results that one of the sessions we facilitate needed to be reduced from 90min to 60 minutes to ensure client satisfaction.*
- *I learned a few tips on how to analyze data more effectively.*
- *In my role I work with the program folks in submitting grant applications. This is helping me to ask questions about evaluation, and helping me to use the same language they use during discussions.*
- *We are using new indicators to assess our work and we created an analysis plan prior to doing the work.*



One participant shared a detailed example of a recent application of evaluation learning:

*Just yesterday I listened with 2 colleagues to an excellent webinar from San Francisco about a survey done with the Social Network ""Grindr" attempting to get survey participation from 1,500 men. The study info presented was very useful in helping us strategize ways to better utilize our staff to do social media outreach, and even to have "me" on Grindr at particular hours to be able to immediately answer STD and HIV questions from anonymous inquiries. We were able to hear survey findings, and rethink ways that we can better serve our clients and meet our projected goals.*

A few participants agreed that the information was valuable, but they were unsure whether they would have a chance to apply it in their current roles at their agencies. For example, one participant said, *"I did learn new tools that are helpful. Not sure how often they will apply to my actual work. Overall though the information was helpful.*

### **Sustainability**

As a final issue, both participating organizational leaders and representatives from the Hartford Foundation for Public Giving were asked to comment on sustainability and usefulness of Anchoring efforts. They were also asked what else was needed regarding evaluation support. As illustrated through the following comments, leaders were clear that they had an ongoing role in sustaining evaluative capacity at their organizations and that it would be an ongoing process.

*We're not institutionalized yet. ... this effort [evaluation] has only touched some program staff. We will continue to do it. Staff need more exposure, repeated exposure. (Anchoring Organization ED)*

*Management buy-in is critical. Maybe we need to cross-train staff and continue to participate in learning groups. We also need obligations to keep sharing data to make this more sustainable. If it is not made a requirement, it might get pushed to the side. (Anchoring Organization ED)*

*I would like to replicate the Anchoring process that we went through. When we shared data with our coordinators . . . I periodically want to go through that process, and would like to universally replicate this. (Anchoring Organization ED)*

*The Anchoring project really completed our other offerings. It helps us meet the needs of the community organizations we serve, and creates a well-rounded offering of programs for the community. (Funder)*

The two areas that organizational leaders identified as needing ongoing support not directly addressed by Anchoring both included integration of evaluative capacity and evaluation skills. Two of the organizations shared concerns about building the evaluation process into their organization's existing process for new program development and all three indicated they needed ongoing help regarding information sharing both internally and externally. Representatives both saw the value in upgrading staff understanding of evaluation and recognized the need to stay vigilant to ensure that staff from various departments stayed informed about the data and evaluation needs and findings from other departments.

## Planned and Suggested Action Steps

Findings from the follow-up survey and final interviews confirmed that Anchoring was a worthwhile investment of organization staff time. Participants enhanced their skills and clarified ways they could and would continue to use the information to be more evaluative and to conduct more effective evaluation including analysis of information. They also pointed out the need and value of ongoing support, and identified some potentially valuable adjustments to the process. This is the second project with similar intent (see also Evaluation Support Project findings on the Bruner Foundation/[Effectiveness Initiatives web site](#)). As a result, the following are suggested for further consideration.

- **Interested funders should consider making evaluation support/anchoring projects an ongoing part of their grantmaking portfolios.** Anchoring participants indicated they would probably need a refresher on all three topics. They also acknowledged that the anchoring project was a supplemental effort being conducted at their organization because intensive training had also already taken place there. As clarified by a participant *“I’m not sure training just in small doses will work. You also need someone in the agency to be well trained.”* Other philanthropic and nonprofit organizations are encouraged to find access to comprehensive training first and then use anchoring training as a follow-up/extension.
- **Provide no/low cost options for nonprofit organizations to access the summarized “anchoring” training materials.** (Plans to post the materials on Bruner Foundation, *Evaluation Services* and Hartford Foundation websites are underway.)
- **Share results of this effort with colleagues and post any other web-ready materials on the Bruner Foundation, *Evaluation Services* and other websites** as appropriate.

## **Issues for Further Consideration**

While it is clear that this effort achieved desired goals, questions remain about the extent to which as with the Evaluation Support Project, project success depended on the somewhat unique characteristics of the participating agencies, their leaders, and the pre-existing relationship between them and the trainer Anita Baker. The following are also respectfully submitted for continued attention.

- 1) **Logistics are always tricky.** The identification of trainees and the use of agency-specific examples worked well in this project. There is now a definite curriculum available for use. But it may still be challenging to determine the best timing and amount of time between sessions and to weave that into existing schedules of other organizations that want to participate.
- 2) **The work is relationship dependent.** It remains unclear whether this type of support can be provided to organizations with whom there is less familiarity – even if they can demonstrate on paper or in an interview that they are “ready” to participate. Since the materials are being made available to other organizations via the internet, it will be very useful if some of those who elect to use the tools also keep track of and share how their participants assess the usefulness of the training. (To that end, the Bruner Foundation is posting a follow-up survey instrument on its website for organizations which use the materials and complete all three sessions. They are also providing some basic support for organizations to collect data about their use of the anchoring strategy.)
- 3) **Finding other evaluation consultants seems necessary but difficult to accomplish.** . It probably remains fruitful to continue development/support of the existing, long-term and productive relationship between the Bruner Foundation and Anita Baker (while remaining open to additional connections). Efforts to track evaluator use of the Anchoring materials as well as to provide specific training to other evaluation professionals regarding evaluation training for nonprofit provider organizations should be pursued.
- 5) **The durability/longevity of Anchoring outcomes is uncertain.** Even by the time of the final assessment (about 3 months after the last training), staff were challenged to remember some specifics of the training . They did describe specific examples of use however, so it’s clear that the level of effort expended for the Anchoring project, followed by Organizational-leader inspired expectation of use, will promote desired utilization/application.

Beyond the issues described above, the issue of cost-effectiveness and the search for economies of scale must be continually considered. Additionally the relationship between delivery of this type of project and overall Bruner Foundation/Effectiveness Initiatives mission must continually be scrutinized. In other words, the Anchoring project and its predecessor the Evaluation Support Project can provide much needed assistance to nonprofit grantees and can promote more evaluative thinking and better evaluation practice for those grantees (i.e., the Anchoring study provides additional evidence the project works.). But, Bruner’s promotion of evaluative thinking goes way beyond agency-by agency support, and questions of whether it’s worth the cost and/or whether self-guided use of the materials will help address ongoing needs, remain unanswered.