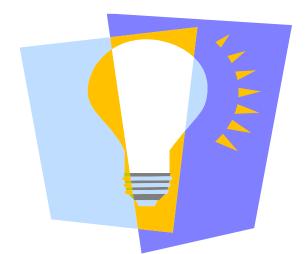# Evaluation Use in Philanthropy

Evaluative Thinking for Grantmakers

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Evaluative Thinking Defined

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

Evaluative Thinking For Organizations

An ongoing process for understanding critical issues

An approach that is fully integrated with an organization's work practices

An approach to improve

➔ Decision-making

➔ Learning

➔ Action

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Adapted from Russ-Eft and Preskill, 2009

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Key Components of Evaluative Thinking

1. Ask questions of substance

2. Determine data needed to address questions

3. Gather appropriate data in systematic ways

4. Analyze data and share results

5. Develop strategies to act on findings

Evaluative Thinking and Organizational Effectiveness

★ *Organizational effectiveness is the ability of an organization to fulfill its mission through a blend of sound management, strong governance, and a persistent rededication to achieving results.* Grantmakers for Effective Organizations

★ Evaluative thinking contributes to all three. It allows organizations to determine the soundness of their management, the strength of their governance and their capacity regarding achievement of results.

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Organizations that Regularly use Evaluative Thinking Also . . .

▶ think carefully about developing plans and assessing actions

▶ incorporate evaluation findings into decision-making and planning

▶ develop written, logical plans; follow plans; have strategies in place to modify plans based on findings

▶ involve significant others when planning and revising plans

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Assessing Evaluative Thinking in your Organization . . .

▶ helps to identify organizational capacity areas where evaluative thinking is more or less prominent (or even non-existent)

▶ informs the setting of priorities regarding how to enhance or sustain evaluative thinking

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Bruner Foundation Evaluative Thinking Tool Assessment* Areas

▶ Mission

▶ Grantee/Client Relation-ships

▶ Leadership

▶ Governance

▶ Fund Development

▶ Evaluation

▶ Finance

▶ Communication & Marketing

▶ Technology Acquisition & Training

▶ Staff Development

▶ Human Resources

▶ Alliances/Collaborations

▶ Program/Project/Initiative Development

*The automated assessment tool is also available as a resource in the *Evaluative Thinking* section of the Bruner Foundation website, www.Brunerfoundation.org/ei.

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How Does Evaluative Thinking Relate to Evaluation Questions*?

➢ You can and should ask questions of substance about any core organizational competency (e.g., HR, Program Development, Finance).

➢ Carefully selecting evaluation questions, according to clear criteria,* will guide efforts to systematically collect and use data.

*Evaluation Question Criteria: It is possible to obtain data to answer the question; there is more than one possible "answer" to the question; the information to address the question is wanted and needed; it is known how resulting information will be used; the questions are aimed at malleable aspects of activity. See also Evaluative Thinking in Philanthropy: *Basic Concepts for Grantmakers* on the Bruner Foundation Website. www.Brunerfoundation.org/ei

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How Does Evaluative Thinking Relate to Logic Models*?

➤ Working through a logic model or logical formulation encourages logical thinking, reflection and when necessary, systematic collection and use of data/information.

➤ Logic models require thinking about inputs, activities and outcomes and the relationships between them. Assessing the specific relationships in logic models requires evaluative thought.

A Logic Model is a simple description of how a Grantmaker or Grantee program is understood to work to achieve outcomes for participants. See also Evaluative Thinking in Philanthropy: *Using Logic Models* on the Bruner Foundation Website. www.Brunerfoundation.org/ei.

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How Does Evaluative Thinking Relate to Data Collection and Analysis*?

➢ Making choices about whether and when to use surveys, interviews, observation or record review to collect data requires evaluative thought.

➢ Planning for and conducting analyses of all data collected requires evaluative thought too.

For more details about using surveys, interviews, observations and record reviews, see also Evaluative Thinking in Philanthropy: *Evaluation Data Collection, and Participatory Evaluation Essentials: An Updated Guide for Nonprofit Organizations and their Partners, 2010,* the Bruner Foundation Website. www.Brunerfoundation.org/ei

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ASSESSMENT EXAMPLE:
Thinking Evaluatively about Programs/Projects/Initiatives

	Does_(Grantee/Grantmaker)_____	Rarely/ Never/ **No**	Some times/ **Sort of**	Mostly/ Always/ **Yes**
1	Identify gaps, conduct needs assessment before planning something new			
2	Incorporate existing findings from prior evaluations into the planning process			
3	Involve multiple stakeholders in developing and revising plans			
4	Develop written plans including a logical formulation			
5	Follow plans where possible and insure that there are strategies in place to determine and execute modifications in a timely fashion if needed			
6	Other:			

ASSESSMENT EXAMPLE:
Thinking Evaluatively about Staff Development

Does _(Grantee/Grantmaker)	Rarely/ Never/ **No**	Some times/ **Sort of**	Mostly/ Always/ **Yes**
1	Conduct formal staff development needs assessments			
2	Develop plans for staff development based on the findings from assessments			
3	Insure that there are regular staff development opportunities			
4	Provide opportunities for staff to assess staff development			
5	Use the results to influence future staff development training offerings			
6	Other:			

What Can Organizational Leaders do to Enhance Evaluative Thinking?

▶ learn about and use evaluative thinking

▶ support staff development about evaluative thinking

▶ conduct, share and use results from an evaluative thinking assessment

▶ develop action plan(s) to help the organization become more evaluative

▶ actively encourage and support a culture of asking key questions, gathering/analyzing data and use the data for decision-making – a culture of learning

Other Tools Available
www.Brunerfoundation.org/ei

Evaluative Thinking Bulletins: brief descriptions and tips regarding use of evaluative thinking across organizational areas.

Planning Worksheet for Assessment of Evaluative Thinking

Automated Evaluative Thinking Assessment Tool for Organizations

Sample Report of Evaluative Thinking Assessment Results Generated by Automated Evaluative Thinking Assessment Tool