

**Bruner Foundation**  
Rochester, New York

# Organization Mission

## Organizations That Use Evaluative Thinking . . .

- ▶ Develop mission statements specific enough to provide a basis for implementation through 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 . . .

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



# Governance

## In Organizations That Use Evaluative Thinking . . .

- ▶ There is a systematic process in place to assess the performance of the board as a whole based on established goals.
- ▶ The board regularly evaluates the organization's progress relative to own goals/workplan/structure.
- ▶ The relationship between organization mission and strategic direction are assessed regularly.



# Governance

## In Organizations That Use Evaluative Thinking . . .

- ▶ 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

## In Organizations That Use Evaluative Thinking . . .

- ▶ 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.



# Finance

## Organizations That Use Evaluative Thinking . . .

- ▶ Systems are in place to provide appropriate financial information to staff; board members use relevant data to inform sound financial decisions.
- ▶ A comprehensive operating budget (ie: costs for all programs, management and fundraising expenses, and 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

## Organizations That Use Evaluative Thinking . . .

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





# Finance

## Organizations That Use Evaluative Thinking . . .

- ▶ 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 specific plan identifying actions to take in the event of a reduction or loss in funding.



# Leadership

## Leaders in Organizations That Use Evaluative Thinking . . .

- ▶ Support program evaluation and evaluative thinking.
- ▶ Educate staff about the value of evaluation and how to participate effectively in evaluation efforts.
- ▶ 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.)
- ▶ Modify the organizational structure as needed in response to evaluation findings.



# Leadership

## Leaders in Organizations That Use Evaluative Thinking 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.
- ▶ Systematically assess the costs and benefits for fund raising events and activities.



# Evaluation

## Organizations That Use Evaluative Thinking . . .

- ▶ 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; and collecting/analyzing program evaluation data.
- ▶ Share results of program evaluations with leaders, staff, clients, board members and funders as appropriate.
- ▶ Use results of program evaluation to drive continuous improvement of programs.



# Evaluation

## Organizations That Use Evaluative Thinking. . .

- ▶ 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 whose 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.
- ▶ Provide training for enough staff members to insure that evaluation use is a standard practice.



# Client Interaction

## In Organizations That Use Evaluative Thinking . . .

- ▶ 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 . . .

- ▶ 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; insure that there are strategies in place to modify program plans if needed.





# Communications and Marketing

## Organizations That Use Evaluative Thinking . . .

- ▶ Have a marketing and communications plan which is linked to the organization's strategic plan and will be used to help the organization achieve its mission.
- ▶ Involve multiple stakeholders including staff, board members, clients 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 and Training

## In Organizations That Use Evaluative Thinking . . .

- ▶ Assessment processes are 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 are able to provide data to evaluate client outcomes.



# Technology Acquisition and Training

## In Organizations That Use Evaluative Thinking . . .

- ▶ Technology systems are able to provide data as necessary (e.g., financial information, time tracking) to evaluate organizational outcomes.
- ▶ Technology systems are regularly assessed to see if they support evaluation.
- ▶ Staff technology needs are regularly assessed.



# Staff Development

## Organizations That Use Evaluative Thinking . . .

- ▶ Conduct formal staff development needs assessment annually (based on staff and organizational needs).
- ▶ Develop a comprehensive plan for staff development based on needs assessment data.
- ▶ Provide opportunities for staff to assess staff development training.
- ▶ Provide opportunities for organization to assess staff development plan.
- ▶ Use results of assessments to influence future staff development.



# Human Resources

## Organizations That Use Evaluative Thinking . . .

- ▶ 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; use the information 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.

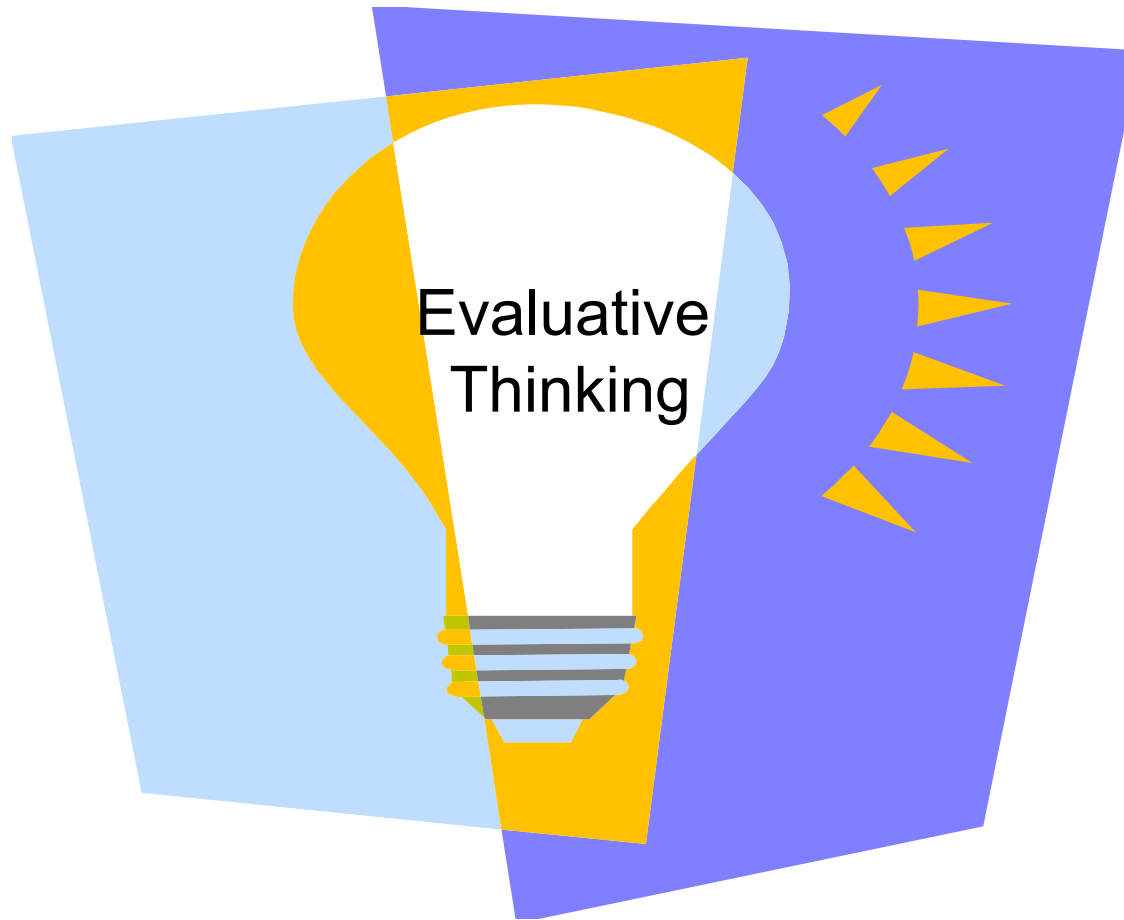


# Alliances and Collaboration

## Organizations That Use Evaluative Thinking . . .

- ▶ Regularly assess existing partnerships/alliances/collaborations to determine if they are functioning effectively and if they continue to meet the organization's mission and strategy.
- ▶ Develop a process to identify additionally needed partnerships/ alliances/collaborations.





Evaluative  
Thinking