



PLANNING FOR AN EVALUATIVE THINKING ASSESSMENT MEETING

Bruner Foundation
Rochester, New York

SUGGESTED STEPS TO TAKE BEFORE THE MEETING

1. Determine whether the assessment will be conducted for the whole organization or a department.
2. Revise instrument language if needed. (Think about how “brave” the organization is and what will be needed to have individuals respond honestly to the items.)
3. Determine who will fill out the assessment. (See #2 above)
4. Develop a cover letter with instructions for completing the instrument, returning completed instruments and attending the meeting (if appropriate).
5. Determine when the instruments will be administered (distribution and collection dates) and whether they will be anonymous or confidential.
6. Determine dates for the meeting.
7. Send out invitation memos and reminders. Clarify the purpose and duration of the meeting.
8. Identify a facilitator for the meeting.
9. Determine who will have final decision-making authority regarding whether items on the tool exist. (Determine whether you are interested in perceptions, truths, both.)
10. If feasible/desirable, enlarge tool to facilitate **recording of responses during meeting.**

SUGGESTED STEPS TO TAKE DURING THE MEETING

1. Specify the purpose of the meeting.
2. Allow participants to record their responses to the tool. (Allow for the responses of those not at the meeting to be recorded.)
3. Review all responses during the meeting. Look for:
 - discrepancies (some people in agreement, some not),
 - (+) similarities (most in agreement)
 - (-) similarities (most disagree)
 - items where there are large numbers of people who answered NA
4. Discuss review findings to make sure that all participants interpreted the items similarly. Make corrections as needed and record any explanatory or contextual comments.

SUGGESTED STEPS TO TAKE AFTER THE MEETING

1. Score the completed instruments (calculate scores and summarize priorities).
2. Distinguish between items that require a communications response and a strategic response.
3. Share the findings (with Executive Director/Senior Mgmt, other key stakeholders)
4. Develop an action plan to address priority items.

Conducting Evaluative Thinking Assessments: A Planning Guide

1. The assessment will be conducted with:

whole organization department(s) _____

2a. Who will fill out the assessment (mark all that apply and specify names)

	Position	Individuals
<input type="checkbox"/>	Executive Director	
<input type="checkbox"/>	Management Staff	
<input type="checkbox"/>	Program Staff	
<input type="checkbox"/>	Board Members	
<input type="checkbox"/>	Consumers/clients	
<input type="checkbox"/>	OTHER	
<input type="checkbox"/>	OTHER	

2b. What preparation/framing is necessary before invitations to participate are made?

3. Administration Date(s) _____ Collection Date(s) _____

* Describe plan for making sure that there is sufficient response.

4. Surveys are to be anonymous confidential

5. Meeting date _____ Alternate _____

6. Meeting facilitator _____
(specify name/title)

7. Final decision-making authority _____
(specify name/title)