

Evaluative Thinking 101: Building a Culture of Learning and Inquiry to Improve Decision Making

Hartford Foundation for Public Giving - Nonprofit Support Program

OVERVIEW DECK

How We Will Spend Our Time Together



Defining evaluative thinking



Exploring what it looks like in practice



Discussing challenges and opportunities



Homework & next steps

What Is Evaluative Thinking?

The ability to use evaluation skills to inform learning and decision making as a matter of habit.

A disciplined approach to inquiry and reflective practice; asking thoughtful questions about ***what you do*** and ***why you do it*** to improve effectiveness.

Used to inform programs, strategies, initiatives *as well as* human resources, marketing, finance, fundraising, board management, partnerships, etc.

What Evaluative Thinking Is (And What It Isn't)

✓ A mechanism to make sound judgement and use good evidence

✓ A cultural shift within an organization

✗ An evaluation activity for a particular programmatic element

✗ Something that is static and used in isolation

What You May Hear...



What are we assuming about this program?

How could we improve this process next time?

How does this connect to the intended outcomes?

What You May See...



Formal and informal evidence gathering



Reflective conversations



Motivation for formal evaluative work



Program evolution and adaptation



Staff and program effectiveness

Why is Evaluative Thinking Important?

- **Organizational benefits**

Strategic use of resources

Increased effectiveness

Evolution/avoidance of stagnation

- **Employee/stakeholder benefits**

Opportunities for skill-building

Increased efficiency

Increased stakeholder satisfaction

Regular reflection and program refinement can lead to a more effective organization.

Five Ways to Increase Organizational Evaluative Thinking

- 1 | Lean into learning
- 2 | Ask meaningful questions
- 3 | Pick a destination
- 4 | Leverage what exists
- 5 | Identify (future) experts

Lean into learning

Paradigm shift from "judgement" to "learning"

Needs:

- A supportive learning environment
- Concrete processes and practices
- Modeled and reinforced by leadership

What does this look like in practice?

- Normalizing the half-baked draft and "yes if"
- Staff survey about HR practices, share results with team, make changes to organizational policy as a result
- Regular topical "lunch and learns" to share knowledge among individuals and across groups

Ask Meaningful Questions

Questions to ask:

- **Who** is impacted by our work?
- **What** do we expect as a result?
- **When** do we realistically expect to see change?
- **Why** do we think this will work?

What does this look like in practice?

- Logic model or theory of change that talks about relationship between activities, outcomes, and rationale
- Reporting templates that staff complete based on quarterly participant satisfaction survey results
- Marketing communications tailored to specific audiences, based on how mailing list registrants completed your registration form

Pick a destination

"If you don't know where you're going, you'll end up someplace else." - Yogi Berra

Considerations:

- Set targets; make them SMARTIE
- Should targets be kept internally?
- It's OK if you don't end up there (lean into learning!)

What does this look like in practice?

Asking (and facilitating discussion around) what we are aiming for when we kick off an initiative

- "75% of the session attendees will report they learned at least one new skill."
- "By December 31, 2025, we will grow our distribution list to 500 individuals."

Leverage what exists

Action items:

Take inventory of everything you already collect

- What is its purpose?
- What (else) can we deduce from it?

Identify gaps in existing tools

What does this look like in practice?

- Counting and tracking the types of books checked out of the library after your reading program (*quantitative data!*)
- Conducting staff exit interviews for offboarding and using data to design onboarding curriculum (*qualitative data!*)
- Asking students to write thank you notes to presenters highlighting the most important thing they learned during their presentation

Identify (future) experts

Action items:

- Look in likely and unlikely places; acknowledge and encourage them
- Support their efforts with dedicated time and professional development, and create opportunities to flex those muscles

What does this look like in practice?

- The youth counselor who conducted an impromptu focus group to decide on topics for their upcoming group series
- The program assistant who noticed a subset of participants stopped coming to programming and wondered why
- The grant writer who spent their evening redesigning a graph to make the headline more prominent and the visual more dynamic

Common Barriers and Challenges



Individual

- Confirmation bias
- Egocentrism
- Assumptions
- Groupthink
- Resistance to change

Organizational

- Lack of diverse perspectives
- Time constraints
- Resource constraints
- Conflicting priorities