BUDDIES PROJECT (2022 - 2026)

Phase 1: Assessment Findings

October 2022

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BACKGROUND

Developmental Disabilities Councils. The phrase "nothing about us, without us" was originally coined by disability advocates to promote and ensure that the voices of the individuals living with intellectual and developmental disabilities and their families were included in policy efforts that would impact their lives (Charlston, 1998). It implies that individuals with the lived experience know what is best for themselves and should have a say in relevant policies. Through the Developmental Disabilities Act of 2000, the national Developmental Disabilities Councils (DDCs) were created to ensure that all policies include the input of people with lived experience (Association of University Centers on Disabilities, 2011).

Each state and territory in the United States (U.S.) has a DDC, by statute. In total there are 56 DDCs across the country (Association of University Centers on Disabilities, 2011). While each DDC determines the relevant priorities and strategies for their states, all DDCs share a core purpose which is to partner with individuals with intellectual and developmental disabilities, their families, and state-wide agencies to identify barriers to and promote inclusivity, self-determination, and integration (American Community Living, 2021). With federal funding established in the Developmental Disabilities Act of 2000, DDCs act as self-governing organizations that focus on advancing public policy with their state and affecting positive, systems and individual level changes (ibid).

Information and Technical Assistance Center for Councils on Developmental Disabilities. Contracted by the Office of Intellectual and Developmental Disabilities (OIDD) across multiple funding cycles, the Information and Technical Assistance Center for Councils on Developmental Disabilities (ITACC) facilitates technical assistance (TA) and training to all DDCs. This TA is typically focused on supporting DDCs to improve their general performance, day-to-day operations, and programmatic outcomes; maintain compliance with OIDD requirements; and act as leaders and agents of change in their states and communities.

Need for evaluation capacity building. In the latest funding cycle for DDCs, evaluation capacity was identified as a core component and area of need for DDCs. In response to this,, ITACC contracted with Partnerships For Health (PFH) to implement the Building Utilization-Focused Developmental Disabilities Impact Evaluation Skills (BUDDIES) Project.
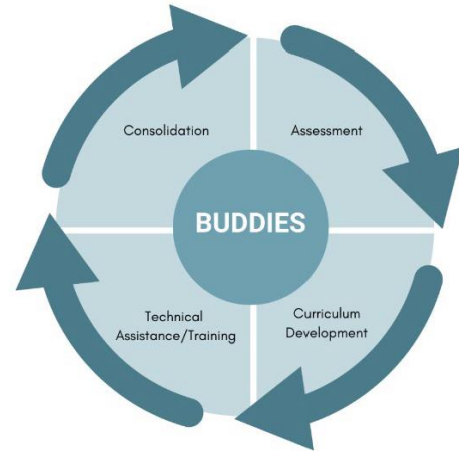
BUDDIES Project. The aim of the BUDDIES Project is to build individual evaluative skills and organizational capacity within DDCs across the U.S. and territories through trainings and evaluation technical assistance (TA).

To do this, the BUDDIES Project consists of four iterative phases.

- *Phase 1: Assessment* – During Phase 1, DDC staff will be invited to complete two assessments to obtain a better understanding of their current evaluation capacity and competencies.
- *Phase 2: Curriculum Development* – Based on the results from the assessments and discussions with DDCs, Phase 2 will focus on developing an evaluation TA and training curriculum. This will include identifying the training topic areas and materials.
- *Phase 3: Technical Assistance/Training* – Using the establishing curriculum, the Project will offer three years of Technical Assistance and Training sessions using the Project ECHO[1] structure.
- *Phase 4: Consolidation* – At the end of the TA/Training phase, the BUDDIES Project will consolidate all knowledge and experience shared by developing a glossary of evaluation terms and a compendium of training materials.

This report summarizes the results of Phase 1 of the BUDDIES Project which was completed in Year 1 (March – September 2022).

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[1] See the Project ECHO website for more information: https://hsc.unm.edu/echo/

METHODOLOGY

A mixed methods study was conducted in 2022 to identify strengths and opportunities at both an organizational and individual level. Activities were guided by the following evaluation questions:

1. What are DDCs' current organizational evaluation capacity? Where are strong areas of capacity and areas for improvement?
   a. To what extent does the size of the organization impact capacity?
2. What are individual DDC staff's current evaluation competencies? Where are strong areas of competencies and areas for improvement?
3. How do DDCs define the success of evaluation technical assistance/training?

Instruments

In the Spring 2022, PFH developed two surveys and one focus group protocol.

ITACC Organizational Evaluation Capacity Survey. The assessment was adapted from the Informing Change Evaluation Capacity Diagnostic Tool and captures information on organizational context and the evaluation experience of staff. The electronic survey was distributed to all 56 DCCs, 37 of whom completed the survey, resulting in a 66.0% response rate.

ITACC Individual Evaluation Competencies Assessment Survey. The assessment was adapted from the U.S. CDC Asthma Control Program and aligned to the U.S. CDC Framework for Program Evaluation in Public Health. The electronic survey asked DDC staff to self-assess their evaluation competencies in engaging stakeholders, describing their program, evaluation design, data collection, analysis, and reporting. In May 2022, the survey was shared with individuals at each DDC who attended previous trainings with ITACC, as well as the DDC leadership. Each DDC was encouraged to share the survey with other staff members. A total of 42 individuals completed the survey.

In addition to distributing the survey via email, PFH held an introductory webinar, as well as a session during the ITACC Technical Assistance Institute. These were facilitated to encourage DDC staff to complete the survey and provide additional support.

Creating a Shared Vision of Success Workshop. In August 2022, PFH presented the results of the assessments to the DDCs and facilitated small group discussions on potential factors of success and how they could be measured. 29 individuals from 23 DDCs attended the Workshop.

Analysis

A number of quantitative and qualitative analyses were undertaken. Results were triangulated.

Weighted average scores. For both Surveys, a standardized scoring system was implemented using the weighted averages of individual responses (see Appendix A for details). For the ITACC Organizational Evaluation Capacity Survey, three scores and six sub-scores were calculated to measure organizational context around evaluation, evaluation experience of DDC staff, and overall DDC-level evaluation capacity. For the ITACC Individual Evaluation Competencies Assessment Survey, an overall score of evaluation competency was calculated, as well as seven sub-scores based on the various evaluation activities.

Inferential analysis. Inferential analysis was undertaken with the ITACC Organizational Evaluation Capacity Survey results to quantify the relationship between DDC size (as measured by the number of staff) and scores. One-way ANOVA tests were run to identify and explore significant differences in average scores based on three categories of DDC sizes, as shown below in Table 1.

Table 1. DDC Size Categorization

DDC Size	Number of Staff
Small	0 – 3 staff
Medium	4 – 8 staff
Large	9+ staff

Descriptive statistics. For both Surveys, descriptive and summary statistics were used to analyze survey responses relating to current evaluation projects; time spent on evaluation; and projected time spent on evaluation technical assistance.

Organization- and Individual-level perspective. The second part of the ITACC Organizational Evaluation Capacity Survey asked respondents to estimate staff evaluation competencies. Results from this section was compared to responses from the ITACC Individual Evaluation Competencies Assessment Survey by converting the scores to equivalent percentages.

Thematic analysis. For various open-ended survey questions on both Surveys, thematic analyses were conducted to identify emerging themes surrounding barriers and expectations for evaluation TA. In addition, a thematic analysis of the discussions facilitated during the Creating a Shared Vision of Success Workshop was conducted.

Dissemination of Findings

Prior to the Creating a Shared Vision for Success Workshop, a PowerPoint containing preliminary findings was developed and presented to ACL and ITACC staff for reflection and contextualization.

All Survey respondents could opt in to receive their results compared to their peers. A total of 25 organizational summaries (See Appendix B for example) and 22 individual summaries (see Appendix C for example) were compiled and distributed. To maintain confidentiality of scores, these summaries were shared only with respondents and were not made available to ITACC or OIDD staff.

RESULTS

Current Evaluation Activities

Time spent engaging in evaluation. During the past 12 months, DDCs reported spending between 9 and 10 hours per month implementing an average of 7 - 9 evaluations. On an individual level, the majority of respondents (55.0%) reported spending a quarter (or less) of their regular work hours on evaluation. Respondents shared examples of their current and/or upcoming plans for evaluation activities, as shown in Table 2.

Table 2. Summary of Current/Planning Evaluation Activities

Organization-Level Examples	Individual-Level Examples
• Surveying partners and grantees • Implementing assessments on health disparities • Assessing the COVID-19 response, as it related to individuals with developmental disabilities • Launching satisfaction surveys among project/program participants • Conducting community needs assessments • Conducting interviews with individuals with developmental disabilities and their families	• Assessing effectiveness of trainings through process evaluations • Conducting outcome evaluations focused on various projects • Implementing public policy evaluations • Assessing COVID-19 responses • Undertaking partner/stakeholder analysis • Implementing pre- and post-assessments • Launching Knowledge, Attitude, and Practice (KAP) surveys

Use of evaluation software. The majority of respondents (88.6% - 97.1%) reported using electronic survey platforms, like SurveyMonkey, to collect and/or analyze data for their organization. Fewer used software for quantitative (14.3% - 17.1%) or qualitative (8.6% - 11.4%) analysis. Usage was higher among respondents to the individual competencies assessment.

Organizational-Level Evaluation Capacity

Level of Evaluation Capacity

Organizational evaluation capacity was measured by the strength of the organizational culture towards evaluation, as well the perceived evaluation skills of its staff. Table 3 summarizes the average score for each.

Organizational context. Generally the Organizational Context score represents DDCs' perceived value of evaluation to their work. The majority of respondents fell into the moderate level of capacity (average: 2.93), with the greatest strength appearing in their current organizational culture and practices around evaluation (average: 3.09).
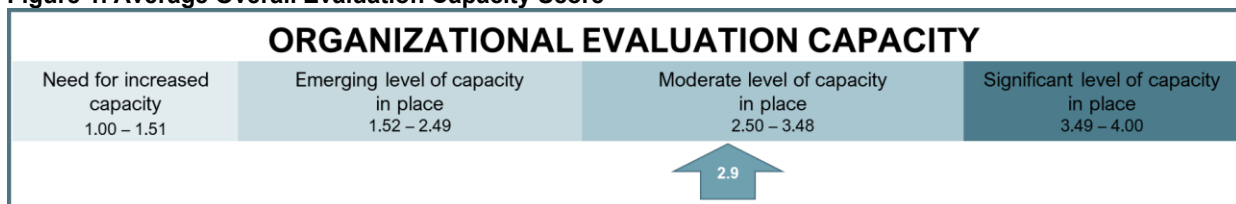
Evaluation experience of staff. The score for evaluation experience includes staff knowledge and experience of evaluation; their ability to design evaluations; and their identification of key evaluation benchmarks and indicators. On average, DDC leaders reported a score of 2.86

Table 3. Organizational-Level Evaluation Capacity Scores

	Average (min – max)
Organizational Context:	**2.93 (2.03 – 3.83)**
Established organizational culture and practice around evaluation	3.09 (2.20 – 4.00)
Extent of organizational commitment and support for evaluation	2.72 (1.88 – 3.50)
Frequency of using data to inform ongoing work	2.97 (2.0 – 4.00)
Evaluation Experience of Staff:	**2.86 (2.24 – 3.74)**
Existing evaluation knowledge and experience	2.91 (2.17 – 4.00)
Experience designing evaluations	2.82 (2.00 – 4.00)
Experience defining benchmarks and indicators	2.84 (2.00 – 3.80)

Overall evaluation capacity. An overall score was calculated by averaging the *Organizational Context* and *Evaluation Experience of Staff* scores. Across all participating DDCs, the average score was 2.9 (range: 2.13 – 3.58) out of a maximum of 4. This placed DDCs in the moderate level of evaluation capacity (see Figure 1), suggesting an existing level of evaluation capacity that may include performance tracking as well as impact evaluation.

Figure 1. Average Overall Evaluation Capacity Score

ORGANIZATIONAL EVALUATION CAPACITY

Need for increased capacity 1.00 – 1.51	Emerging level of capacity in place 1.52 – 2.49	Moderate level of capacity in place 2.50 – 3.48	Significant level of capacity in place 3.49 – 4.00

2.9

Relationship between organizational capacity and DDC size. As shown in Table 4, evaluation capacity did not appear to vary much across DDC sizes. This was confirmed using One-Way ANOVA testing which showed no statistically significant differences in average scores based on size.

Table 4. Average Organizational Scores, by DDC Size

DDC Size	AVERAGE SCORES		
	Organizational Context	Evaluation Experience	Overall Evaluation Capacity
Small (1 – 3 staff) *n = 12*	2.87	2.83	2.84
Medium (4 – 8 staff) *n = 12*	3.13	2.87	3.00
Large (9+ staff) *n = 13*	2.81	2.87	2.84

Individual-Level Evaluation Competencies

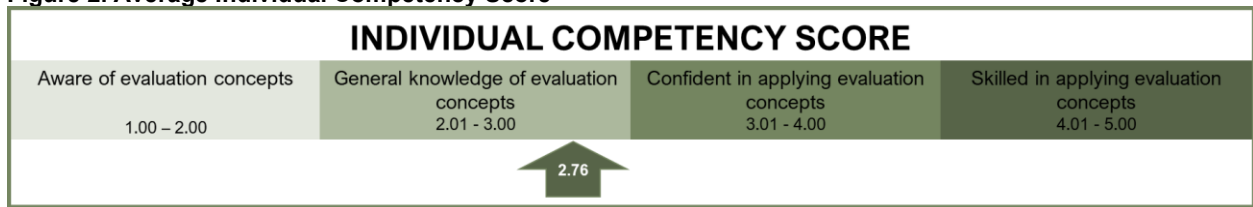### Level of Evaluation Competencies

Activity-specific competencies. Across the various evaluation activities, respondents' self-assessment typically placed them in the higher end of the general knowledge level of evaluation competency (see Table 5). While respondents' overall strengths appear to lie in engaging stakeholders and describing their programs, their competencies for analyzing that data and managing evaluations tended to lower (2.24 and 2.42 respectively).

Table 5. Individual-Level Evaluation Competency Scores

Evaluation Activity	Average (min – max)
Engaging stakeholders	2.96 (1.00 - 5.00)
Describing the program	3.02 (1.00 – 5.00)
Designing evaluations	2.74 (1.00 – 5.00)
Collecting data	2.85 (1.13 – 5.00)
Analyzing data	2.24 (1.00 – 4.17)
Reporting and disseminating findings	2.93 (1.00 – 5.00)
Managing the evaluation	2.42 (1.00 – 4.71)

Evaluation competencies. As shown in Figure 2, Overall, respondents scored an average of 2.76 (range: 1.15 – 5.00) for their evaluation competencies (maximum score: 5). This suggests that respondents have a strong working knowledge of various evaluation concepts but could use additional support to put their knowledge into practice.

Figure 2. Average Individual Competency Score

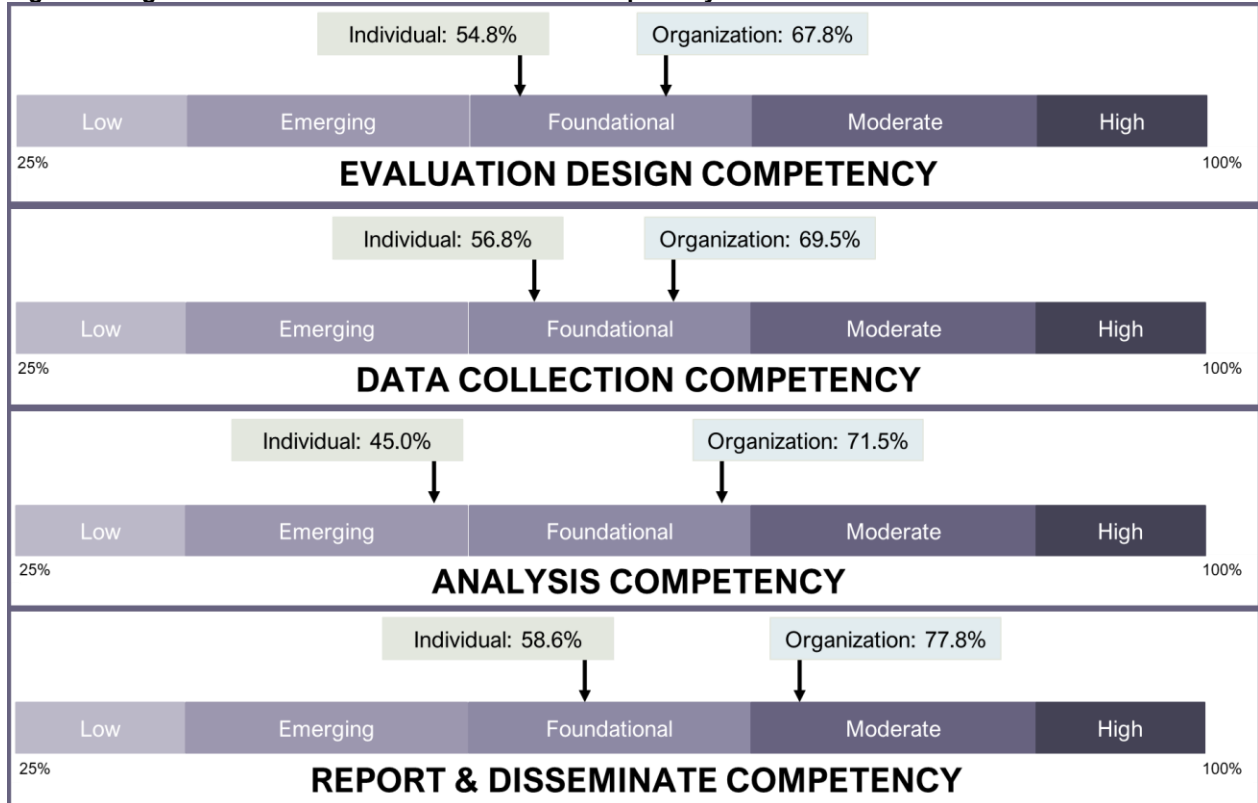| INDIVIDUAL COMPETENCY SCORE			
Aware of evaluation concepts 1.00 – 2.00	General knowledge of evaluation concepts 2.01 - 3.00	Confident in applying evaluation concepts 3.01 - 4.00	Skilled in applying evaluation concepts 4.01 - 5.00

2.76

Organization Perceptions vs Individually Assessed Evaluation Competencies.

Secondary analysis was undertaken to assess the extent to which the DDCs' perceptions of evaluation competencies aligned with individuals' self-assessed competencies. Overall, DDCs tended to rate their staff's evaluation competencies higher than individual respondents. This was evident across all major evaluation phases, as shown in Figure 3. However, there was the most discord around data analysis competencies (organizational: 71.5% vs individual: 45.0%) and reporting / dissemination (organizational: 77.8% vs individual: 58.6%).

Figure 2. Organizational vs. Individual Evaluation Competency Scores

BUDDIES Project Shared Vision of Success

Value of BUDDIES Project. Respondents identified numerous outcomes they hope to see at the end of the Project.

Increased evaluative thinking. DDCs identified evaluative thinking as an area where they would like to increase their evaluative approach. They hope to be able to improve their evaluation critical thinking skills to better understand the 'whys' and 'how's of their work. In addition, DDCs wanted to be able to use evaluation findings to inform projects/programs and link them back to the logic model or theory of change that guides their work.

Additional internal evaluation structures built. In an attempt to make evaluation more accessible to their staff, DDCs want to be able to create streamlined and easy-to-use evaluation processes within their organizations that can be easily integrated into various projects and programs. This may include general evaluation checklists, standardized satisfactions assessments, and so on. In addition, DDCs expressed an interest in improving their internal documentation of evaluation processes, lessons learned, and strategies.

Increased staff evaluation technical skills. DDCs hope to increase their technical skills as a result of participating in the BUDDIES Project. This included the following:
- Evaluation planning: study design options, going beyond surveys, limitations of designs.
- Theoretical frameworks: frameworks for evaluating outcomes, impacts, processes, public policy.
- Data collection: developing tools, using innovative approaches, streamlining data collection.
- Data analysis: analysis techniques, pre- and post-analysis, data interpretation.
- Cultural competencies in evaluation: health equity, translations of tools, race/ethnicity data.

Increased ability to tell their story. At the end of the BUDDIES Project, DDCs would like to be more effective in sharing their evaluation results. For many DDCs, this includes determining the right balance between federal reporting requirements to simply check a box and DDCs' ability to share the outcomes and impacts of their work. DDCs would like to increase their ability to use and translate the data they collect to tell the story of their effort and outcomes. Part of this includes communicating about what life would look like for individuals with developmental disabilities and their families in their state without the work of the DDC.

Increased collaboration and learning from other DDCs. DDCs expressed a desire to use the BUDDIES Project training sessions as a way to collaborate with, and learn from, their peers. During discussions, DDCs asked: What are other DDCs doing around evaluation? How are other DDCs evaluating their projects and programs? What tools are other DDCs using to collect data? What opportunities are there for DDCs to share tools and resources?

Time commitment to the BUDDIES Project. Respondents estimated that, as an organization, they could allocate approximately 10 hours per month to the Project. On an individual level, this was projected to be between 2 and 4 hours per month.

Potential barriers. As shown in Table 6, Survey respondents and Workshop participants reported numerous barriers to participating in the BUDDIES Project and proposed mitigating strategies.

Table 6. BUDDIES Project Barriers and Mitigation Strategies

Barrier	Mitigating Strategy
Varying levels of evaluation experience between DDCs may result in different technical assistant needs.	• The training sessions will start with basic concepts and progress over time. • A schedule of training topics will be provided annually so that each DDC can plan to attend sessions that will be most beneficial to them.
Scheduling conflicts and competing priorities.	• The training sessions will be held in the late afternoon Eastern Standard Time. • A recording of each session will be made available so that DDCs who are unable to attend can view the recording.
Hesitation to make internal changes in evaluation processes and/or approaches within DDCs.	• The training sessions will include small group discussions on how to implement changes and overcome resistance.
Financial resources for evaluation, including participating in the BUDDIES Project is limited.	• A schedule of training topics will be provided annually so that each DDC can plan to attend sessions that will be most beneficial to them. • A recording of each session will be made available so that DDCs who are unable to attend can view the recording.

CONCLUSION

Overall, DDCs s and staff generally reported a general capacity and knowledge of evaluation. The Overall Evaluation Capacity score from the ITACC Organizational Capacity Survey highlighted a key theme – DDCs clearly value the important role of evaluation in their work but don't always have the internal capacity to prioritize it. This was evident in DDCs' interest in developing their internal evaluation structures and creating easy to use evaluation systems that are embedded within their current practices to make evaluation activities more accessible to all staff.

There were some differences in perspectives between DDCs and individual staff members, with DDCs tending to report higher evaluation-related capacity and competencies, as compared with individual staff. There was some discussion with DDCs that these discrepancies may be the result of evaluation activities that are contracted out to 'evaluation experts'.

The differing perspectives highlighted the importance for the BUDDIES Project that the evaluation TA and trainings sessions should aim to build competencies for DDCs and individual staff. This may include an initial focus on evaluative thinking to help support organizational development in evaluation processes, systems and structures, followed by more in-depth, technical evaluation skill-building sessions focused on supporting individual staff's growth.

These results represent the baseline of DDC and staff evaluation-related capacity and competencies. The Surveys will be completed again at the conclusion of the BUDDIES Project to assess changes in evaluation knowledge, skills, and confidence.

LIMITATIONS

Standardized tools. To maintain fidelity to the concepts of organizational and individual evaluation-related capacity and competencies, standardized Surveys were used for the BUDDIES Project. In doing so, the tools and response options within may not always perfectly fit the needs of all respondents. This limitation was noted and discussed with DDCs during their process of completing the Surveys.

Council representation. While all DDCs and staff were invited to complete the Surveys and attend the August 2022 Developing a Shared Vision of Success Workshop, participation in these activities was not required and there were therefore some DDCs that did not take part. All DDCs across the country and territories are unique in their own ways and there are many factors that may influence their perspectives. Without participation from all DDCs, the results are not completely representative of the entire group.

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APPENDIX A. ORGANIZATIONAL & INDIVIDUAL SURVEY SCORE SUMMARIES

ITACC ORGANIZATIONAL EVALUATION CAPACITY SURVEY SCORES	
RELEVANT SCORE/SUB-SCORE	**SCORE COMPONENTS**
Overall Evaluation Capacity Score	
The Overall Evaluation Capacity Score is a composite score based on the: • Organizational Context Score (see components below) • Evaluation Experience of Staff Score (see components below)	
Organizational Context Score	
Evaluation Culture & Practice	Organization sees evaluation as a tool that is integral to their work
	Organization models a willingness to be evaluated by ensuring that evaluations, both their process and findings, are routinely conducted and visible to others within and outside the organization
	Organization has an effective communication and reporting capability to explain evaluation processes and disseminate findings, both positive and negative, within and outside the organization
	Organization promotes and facilitates internal staff members' learning and reflection in meaningful ways in evaluation planning, implementation, and discussion of findings ("learning by doing")
	Organization values learning, as demonstrated by staff actively asking questions, gathering information, and thinking critically about how to improve the work
Organizational Commitment & Support	Key leaders in the organization support evaluation
	Organization has established clear expectations for the evaluation roles of different staff
	Organization ensures that staff have the information and skills that they need for successful participation in evaluation efforts (e.g., access to evaluation resources through Web sites and professional organizations, relevant training)
	Organization allows adequate time and opportunities to collaborate on evaluation activities, including, when possible, being physically together in an environment free from interruptions
	Organization provides financial support (beyond what is allocated through grants) to integrate evaluation into program activities
	Organization has a budget line item to ensure ongoing evaluation activities
	Organization has existing evaluation data collection tools and practices that can be applied/adapted to subsequent evaluations
	Organization has integrated evaluation processes purposefully into ongoing organizational practices
Use of Data to Inform Work	Organization modifies its course of action based on evaluation findings (e.g., changes to programs or organizational changes).
	Evaluation findings are integrated into decision making when deciding what policy options and strategies to pursue
	Managers look to evaluation as one important input to help them improve staff performance and manage for results

ITACC ORGANIZATIONAL EVALUATION CAPACITY SURVEY SCORES	
RELEVANT SCORE/SUB-SCORE	SCORE COMPONENTS
Evaluation Experience of Staff Score	
Evaluation Knowledge and Experience	Organization has staff that have a basic understanding of evaluation (e.g., key evaluation terms, concepts, theories, assumptions)
	Organization has staff that are experienced in designing evaluations that take into account available resources, feasibility issues (e.g., access to and quality of data, timing of data collection) and information needs of different evaluation stakeholders
	Organization can identify which data collection methods are most appropriate for different outcome areas (e.g., changes in norms require determining what people think about particular issues, so surveys, focus groups and interviews are appropriate)
	Organization has staff with experience developing data collection tools and collecting data utilizing a variety of strategies, such as focus group sessions, interviews, surveys, observations, and document reviews
	Organization has staff that know how to analyze data and interpret what the data mean
	Organization has staff that are knowledgeable about and/or experienced at developing recommendations based on evaluation finding
Evaluation Design	Organization has articulated how it expects change to occur and how it expects specific activities to contribute to this change
	Organization has clarity about what it wants to accomplish in the short term (e.g., one to three years) and what success will look like
	Organization has articulated how its policy change goals connect to broader social change
	Organization's evaluation design has the flexibility to adapt to changes in the policy environment and related work as needed (e.g., benchmarks and indicators can be modified as the project evolves)
	Organization has tools and methods for evaluating the unique and dynamic nature of advocacy work
Benchmarks and Indicators	Organization measures outcomes, not just outputs
	Organization can identify outcome indicators that are important/relevant for its work
	Organization has identified what indicators are appropriate for measuring the impact of its work (e.g., did the work change attitudes?, did it change policy?, did it raise money or increase volunteer hours?)
	Organization can identify what indicators are appropriate for measuring how it completes work (e.g., has the organization strengthened its relationships with elected officials?)
	Since policy goals can take years to achieve, the organization identifies and tracks interim outcomes that can be precursors of policy change, such as new and strengthened partnerships, new donors, greater public support, and more media coverage, that tell if progress is being made and it the organization is on the right track

ITACC INDIVIDUAL EVALUATION COMPETENCIES ASSESSMENT SURVEY	
RELEVANT SCORE/SUB-SCORE	**SCORE COMPONENTS**
Individual Competency Score	
The Individual Competency Score is a composite score based on the evaluation stages: • Engaging Stakeholders • Describing the Program • Designing the Evaluation • Collecting Data • Analyzing Data • Reporting and Disseminating Data • Managing the Evaluation	
Engaging Stakeholders	Involving stakeholders in the evaluation planning process and throughout implementation, as appropriate
	Describing the benefits and uses of program evaluation to program staff and other stakeholders
	Engaging stakeholders to discuss evaluation purpose, user(s), and use of the evaluation and its findings
	Recognizing and using strategies to reduce 'evaluation anxiety' in stakeholders
	Assessing the evaluability of the program
Describing the Program	Identifying the appropriate tool(s) to describe the program (e.g. narrative description, logic model, system map)
	Identifying documents and materials useful for creating a program logic model or roadmap
	Creating a logic model or roadmap
	Identifying contextual factors that could affect program implementation
	Identifying potential unintended consequences of the program (positive and negative)
Designing the Evaluation	Using program descriptions, logic models, or roadmaps to guide the development of evaluation questions
	Delineating the scope / boundaries of the evaluation (i.e. identifying what is critical to include in a particular evaluation)
	Formulating meaningful evaluation questions that capture stakeholder needs
	Choosing an evaluation design best suited for your evaluation questions, considering factors such as the range of study designs and methods, resources available, levels of evidence needed
	Planning studies with various evaluation designs, such as experimental, quasi-experimental, non-experimental
	Designing studies using quantitative, qualitative, or mixed methods
	Assessing whether existing indicators will suffice or whether new ones must be developed to answer evaluation questions
	Identifying existing monitoring data / systems that can provide input into the evaluation

ITACC INDIVIDUAL EVALUATION COMPETENCIES ASSESSMENT SURVEY	
RELEVANT SCORE/SUB-SCORE	**SCORE COMPONENTS**
Collecting Data	Adapting existing data collection instruments for evaluation purposes
	Identifying and using existing data for evaluation purposes (e.g. surveillance, program monitoring systems, program documents, medical records)
	Developing quantitative data collection instruments (e.g. surveys and questionnaires)
	Developing qualitative data collection instruments (e.g. interviews, focus groups and observational protocols)
	Collecting data using data collection instruments
	Adapting data collection instruments to occur using virtual platforms (e.g., conducting a focus group through zoom rather than in-person)
	Creating and maintaining secure databases
	Identifying the need for relevant approval packages and preparing them (e.g. Institutional Review Boards)
Analyzing Data	Assessing data quality (completeness, validity, etc.)
	Cleaning data
	Using data analysis software
	Analyzing quantitative data using statistics (e.g. descriptive, correlational, comparison of means, regression, etc.)
	Analyzing qualitative data including creating codebooks and coding for themes
	Interpreting and synthesizing all findings to create a unified narrative
Reporting and Disseminating Data	Summarizing the evaluation and its findings in user-friendly products
	Using data visualization techniques to clearly communicate findings and support interpretation
	Tailoring the presentation of evaluation findings to multiple audiences
	Using a variety of formats to communicate evaluation findings and recommendations
	Facilitating conversations with stakeholders to reflect on findings and formulate actionable steps or recommendations
	Working with stakeholders to integrate evaluation findings into program planning
Managing the Evaluation	Budgeting for evaluation
	Identifying the appropriate mix of skills needed for a specific evaluation (e.g., interpersonal, technical skills)
	Hiring or contracting for evaluation
	Establishing and using systems to document evaluation implementation
	Monitoring and communicating progress to stakeholders
	Addressing ethical or political issues that arise
	Evaluating your evaluation (i.e., meta-evaluation)

APPENDIX B. EXAMPLE OF ORGANIZATIONAL SUMMARY

Organizational Evaluation Capacity

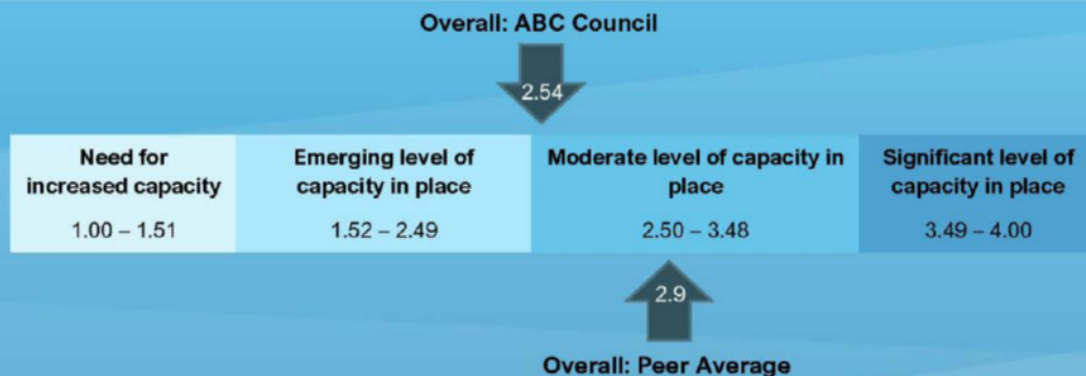### Results from Spring 2022 Assessment for the ABC Council

In Spring 2022, Partnerships For Health (PFH) on behalf of ITACC, undertook a national assessment of the evaluation capacity of Developmental Disability Councils in the United States and territories. The findings were used to develop an evaluation training curriculum. Two-thirds (66%) of Councils completed the Organizational Evaluation Capacity Survey. Using a standardized scoring methodology and descriptive statistics, PFH established average scores to measure Councils' overall evaluation capacity, as well as the organizational culture around evaluation and the evaluation experience of staff. This report aligns the ABC Council's results with their peers' averages.

Organizational Context

	ABC Council	Peer Average
Culture and practice around evaluation	3.18	3.09
Commitment and support for evaluation	2.12	2.72
Use of data to inform ongoing work	2.25	2.97
Overall Score	*2.52*	*2.93*

Evaluation Experience of Staff

	ABC Council	Peer Average
Existing evaluation knowledge and experience	1.94	2.91
Ability to develop a conceptual model for designing evaluations	2.02	2.82
Ability to define benchmarks and indicators	3.69	2.84
Overall Score	*2.55*	*2.86*

Overall: ABC Council

⬇ 2.54

Need for increased capacity	Emerging level of capacity in place	Moderate level of capacity in place	Significant level of capacity in place
1.00 – 1.51	1.52 – 2.49	2.50 – 3.48	3.49 – 4.00

⬆ 2.9

Overall: Peer Average
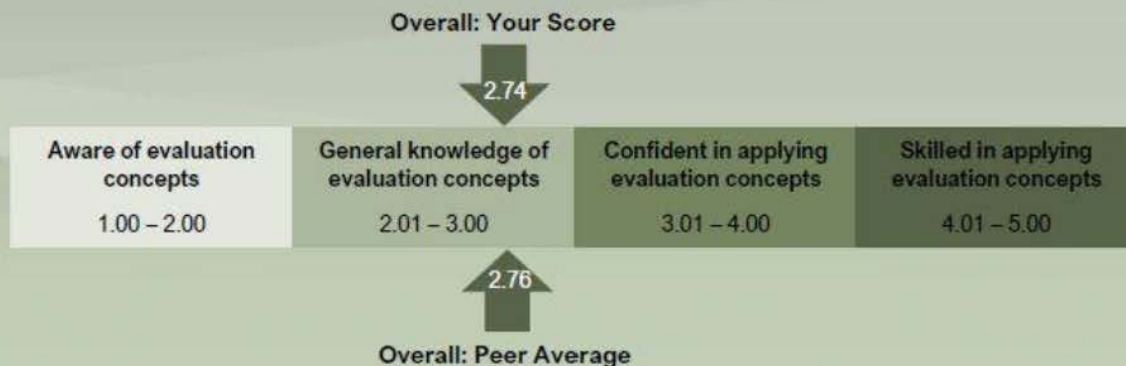
APPENDIX C. EXAMPLE OF INDIVIDUAL SUMMARY

Individual Evaluation Competencies

Results from Spring 2022 Assessment for
John Doe from the ABC Council

In Spring 2022, Partnerships For Health (PFH), on behalf of ITACC, undertook a national assessment of the evaluation competencies of individual staff members at Developmental Disability Councils in the United States and territories. The findings were used to develop an evaluation training curriculum. 42 individuals from varying Councils completed the Individual Evaluation Competencies Survey. Using a standardized scoring methodology and descriptive statistics, PFH established average scores to measure individuals' competencies at each stage of the evaluation process. This report aligns your scores with your peers' average.

Evaluation Competencies

	Your Score	Peer Average
Engaging evaluation stakeholders	3.17	2.96
Describing your work	3.28	3.02
Designing the evaluation	2.42	2.74
Collecting data	2.76	2.85
Analyzing data	1.98	2.24
Reporting and sharing evaluation findings	3.01	2.93
Managing the evaluation	2.59	2.42

Overall: Your Score

2.74

Aware of evaluation concepts	General knowledge of evaluation concepts	Confident in applying evaluation concepts	Skilled in applying evaluation concepts
1.00 – 2.00	2.01 – 3.00	3.01 – 4.00	4.01 – 5.00

2.76

Overall: Peer Average

FOR MORE INFORMATION:

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