



BUDDIES PROJECT

*Building **U**tilization-focused **D**evelopmental
Disabilities **I**mpact **E**valuation **S**kills*

YEAR 4 EVALUATION TECHNICAL ASSISTANCE AND TRAINING REPORT

March 2026

BUDDIES PROJECT

Year 4 Evaluation Technical Assistance and Training Report

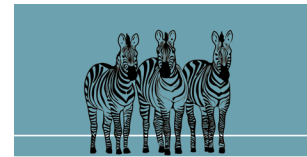
Prepared by:

Michelle Mitchell, MSocSc
Michelle Munsey, MA

Partnerships For Health
112 State Street

Augusta, ME 04330

www.PartnershipsForHealth.org



PFH PARTNERSHIPS
FOR HEALTH

Prepared for:

Sheryl Matney
Amy Deaville

Information & Technical Assistance
Center for Councils on
Developmental Disabilities

<https://itacchelp.org/>



Sara Newell-Perez

Office of Intellectual and
Developmental Disabilities,
Administration for Community Living

<https://acl.gov/about-acl>



CONTENTS

PROJECT BACKGROUND..... 1

YEAR 4 BUDDIES ACTIVITIES..... 2

 BUDDIES Sessions..... 2

 BUDDIES Tools 2

EVALUATION OF BUDDIES..... 5

 Evaluation Design 5

 Data Collection..... 5

 Analysis..... 5

FINDINGS 6

 Session Attendance 6

 Session Satisfaction 7

 Meeting BUDDIES Objectives 8

 Councils’ Organizational Evaluation Capacity 9

 Change in Council Staffs’ Evaluation Competencies10

RECOMMENDATIONS12

 Council Staff Suggestions12

 Planned Activities12

CONCLUSION12

LIMITATIONS.....13

REFERENCES.....14

PROJECT BACKGROUND

Developmental Disabilities Councils. Developmental Disabilities (DD) Councils were established under the Developmental Disabilities Assistance and Bill of Rights Act of 2000 (42 U.S.C. §§ 15001 et seq., 2000) to support and advocate for individuals with intellectual and/or developmental disabilities (I/DD) and their families. Located in each U.S. state and territory, these Councils work to improve the lives of individuals with I/DD in a variety of ways. Their efforts include promoting inclusive policies, helping to improve access to needed services and supports, and engaging in evaluation activities to better understand and respond to the needs of the communities they serve (Administration on Intellectual and Developmental Disabilities, 2021).

Councils are generally composed of individuals with I/DD, family members, and professionals with experience in the field, ensuring that a range of perspectives informs their work (Administration on Intellectual and Developmental Disabilities, 2021). Through advocacy and systems improvement efforts, DD Councils contribute to shaping policies and practices that affect individuals with I/DD. In doing so, they help support community participation, protect individual rights, and encourage greater inclusion.

The Office of Intellectual and Developmental Disabilities (OIDD), within the Administration for Community Living (ACL) at the U.S. Department of Health and Human Services, administers the DD Councils' initiatives. OIDD contracts with the Information and Technical Assistance Center for Councils on Developmental Disabilities (ITACC) to provide technical assistance and support. ITACC works with Councils to strengthen performance, support day-to-day operations, enhance program outcomes, and maintain alignment with OIDD requirements.

Evaluation capacity building. Evaluation capacity building refers to efforts to strengthen an organization's ability to apply evaluative thinking and conduct meaningful evaluations that will guide decision-making and program improvement (Patton, 2011). These efforts may include training, resources, and ongoing support to build skills in evaluation design, data collection, analysis, and interpretation (Stufflebeam & Shinkfield, 2007). Building this capacity can help foster a culture of learning, support program refinement (Scheirer, 2005), and encourage ongoing reflection and improvement (Morariu, 2012).

BUDDIES Project. The Building Utilization-focused Developmental Disabilities Impact Evaluation Skills (BUDDIES) Project is designed to support DD Councils in strengthening their evaluation capacity through training, technical assistance, and practical resources. This report focuses on Year 4 BUDDIES technical assistance and training activities and related evaluation findings.

YEAR 4 BUDDIES ACTIVITIES

The BUDDIES Project is intended to strengthen evaluative skills among DD Council staff and enhance evaluation capacity at the organizational level through training, technical assistance, and resource development. In Year 4, the Project focused on delivering targeted BUDDIES sessions, refining the curriculum based on Council input, and developing practical tools to support evaluation and planning work.

BUDDIES Sessions

At the start of Year 4, Councils were invited to share feedback on priority learning topics and useful resources. Based on that input, the Year 4 curriculum emphasized data collection methods, data visualization, surveys, Institutional Review Boards (IRBs), and strategic goal setting. Six BUDDIES sessions were conducted in Year 4 (see Table 1).

BUDDIES Tools

In addition to implementing BUDDIES Sessions, Year 4 of the project included the development of some practical tools that Councils could use to strengthen their planning and evaluation work. Two key resources were created:

The Strategic Alignment Matrix (SAM) Workshop Guide. The SAM Workshop Guide is a step-by-step resource designed to help Council staff facilitate strategic planning discussions with Council members, partners, community members, and other stakeholders. The Guide outlines a structured workshop process built around a decision-support tool that enables participants to review relevant data, generate potential goal areas, and evaluate them using shared criteria. The SAM process helps Councils move from a broad set of ideas to a focused set of high-priority goal areas grounded in data and community input. As of April 2026, the SAM Guide was downloaded from the ITACC website 565 times.

BUDDIES Survey Questions Bank. The Survey Bank provides Councils with a collection of plain-language survey questions aligned with federal performance measures. The document includes multiple question formats and response options for key reporting areas such as demographics, advocacy outcomes, and systems-change activities. By offering adaptable question wording while maintaining alignment with federal reporting requirements, the Survey Bank helps Councils collect consistent, accessible data that can be easily incorporated into evaluation efforts and federal reporting processes. The Survey Bank was posted on the ITACC website as a resource for Councils and was downloaded 517 times as of April 2026.

BUDDIES PROJECT

Year 4 Evaluation Technical Assistance and Training Report

Table 1. Description of Year 4 BUDDIES Sessions

DATE	TOPIC	NUMBER OF PARTICIPANTS	NUMBER OF COUNCILS	DESCRIPTION
Sept 2024	Data Collection Methods	20	11	The session introduced participants to key considerations for planning data collection and highlighted five methods: surveys, focus groups, World Café, Ripple Effects Mapping, and polling. Participants then engaged in an interactive activity in which they reviewed several scenarios and used Mentimeter to select and discuss which data collection methods would be most appropriate.
Feb 2025	Year 4 Planning	17	15	The first session of 2025 focused on planning for Year 4 of the BUDDIES Project and gathering participant input on future training topics. Participants reviewed results from the Evaluation Needs and Interests Survey and participated in small-group discussions to explore priority topics. Small group discussions were reported to the large group to share ideas and identify potential objectives to guide future sessions and resources.
May 2025	Data Visualization	23	15	This May session offered insight on how visual displays of data can support understanding, engagement, and decision-making. Participants learned about different types of data visuals and discussed best practices for creating clear and accessible data visuals. Based on participant interest, the session also included an impromptu tutorial on how to create maps using Microsoft Excel.

BUDDIES PROJECT

Year 4 Evaluation Technical Assistance and Training Report

DATE	TOPIC	NUMBER OF PARTICIPANTS	NUMBER OF COUNCILS	DESCRIPTION
June 2025	Goal Setting with the DD Councils: The SAM Workshop Guide	110	39	This session introduced the SAM Workshop Guide. The presentation provided an overview of the six-step SAM workshop process used to generate ideas, assess them against shared criteria, and prioritize initiatives for inclusion in the Council’s strategic plan. The session also highlighted facilitation strategies and tools to support inclusive, criteria-based decision-making and to document Council priorities.
July 2025	Surveys	28	18	The July session focused on designing, developing, and distributing effective surveys to collect evaluation and performance measures data. Participants learned key considerations for survey preparation, question development, common pitfalls, and strategies for improving response rates. The session also introduced the Survey Bank resource and included an interactive ‘Jeopardy’ activity that allowed participants to apply concepts related to survey design, question development, and survey implementation.
Sept 2025	Institutional Review Boards (IRBs)	27	14	This session introduced Institutional Review Boards and their role in protecting human participants in evaluations. Participants learned about the differences between research and program evaluation, levels of IRB review, and key factors, such as minimal risk, identifiable data, and vulnerable populations, that influence whether IRB review is required. The session also highlighted practical tools and resources to help Councils determine when IRB review may be needed and navigate the process more efficiently.

EVALUATION OF BUDDIES

Evaluation Design

A prospective mixed-methods evaluation was designed to assess the effectiveness of the Year 4 technical assistance and training and to support ongoing quality improvement.

Data Collection

PFH invited Councils to take part in two evaluation activities. The University of Southern Maine Institutional Review Board reviewed this work and determined it did not constitute human subjects research (Protocol #: 042922-60).

BUDDIES Post-Session Survey. A brief, six-question survey was distributed to participants after each session to gather feedback on their experience, the usefulness of the content, and suggestions for future topics. Across the Year 4 sessions, a total of 36 surveys were completed by participating Councils, resulting in an average response rate of 28.3%. Response rates for individual Year 4 sessions are presented in Table 2.

Table 2. Year 4 BUDDIES Sessions - Post-Session Survey Response Rates

DATE	TOPIC	NUMBER OF SURVEY RESPONSES	RESPONSE RATE
September 2024	Data Collection Methods	4	20.0%
February 2025	Year 4 Planning	6	19.4%
May 2025	Data Visualization	11	47.8%
July 2025	Surveys	8	28.6%
September 2025	Institutional Review Boards	7	25.9%

BUDDIES Annual Survey. To assess the annual effectiveness of the BUDDIES sessions, all Councils were invited to complete a brief survey in September 2025. PFH developed outreach language, and ITACC supported recruitment by conducting direct email outreach and communicating with Councils. PFH also distributed a reminder through the ITACC listserv. The survey was open from September 9 to September 26 and received a total of 8 responses.

Analysis

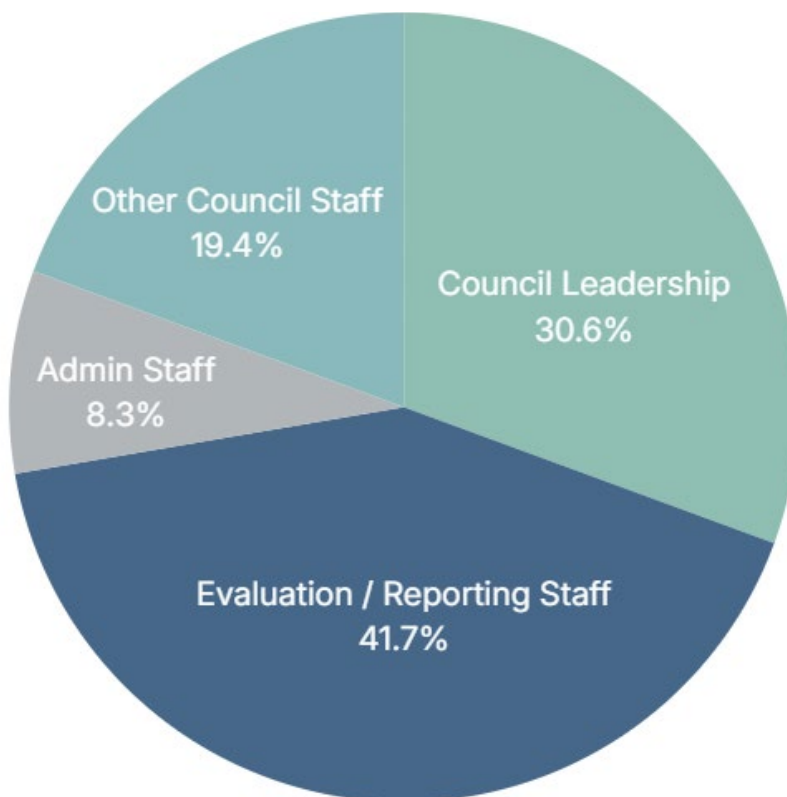
Each survey was analyzed using descriptive statistics. When applicable, Year 4 (2024 – 2025) results were compared against Year 3 (2023 – 2024) to note annual changes. In addition, an inductive thematic analysis was undertaken on qualitative data to explore emerging themes.

FINDINGS

Session Attendance

In Year 4, 115 individuals¹ representing 34 unique Councils attended the virtual BUDDIES sessions. Most Councils (44.1%) attended only one of the Year 4 sessions and just under one-third attended two or three sessions (32.4%). Only two Councils attended all sessions in Year 4 (5.9%)². As shown in Figure 1, Year 4 sessions were attended primarily by Council staff responsible for evaluation and data reporting (41.7%) and Council leaders (30.6%).

Figure 1. Year 4 Virtual BUDDIES Session Attendance, by Council Role (n=36 session survey participants)



¹ Participation numbers may be duplicative. Some individuals may have attended multiple sessions.

² Excluding the session conducted as part of the 2025 TAI.

Session Satisfaction

Overall, Council's reported higher satisfaction with BUDDIES sessions in Year 4 than in Year 3. The majority of Council participants indicated that they were actively engaged during the Year 4 sessions (86.1%) and that the information presented was relevant and applicable to their work (83.3%). Participants also noted that the session structure allowed sufficient time for both questions (88.9%) and group discussion (88.9%). Most participants felt that the sessions met their expectations for learning (80.6%), as detailed in Table 3.

Table 3. Summary of Training Satisfaction (Year 3 vs. Year 4)

STATEMENT	YEAR 3 % AGREE (n=28)	YEAR 4 % AGREE (n=36)
Engaged in session	71.4%	86.1%
Enough time for discussion	75.0%	88.9%
Enough time for questions	81.5%	88.9%
Learned what they expected to	67.9%	80.6%
Learned something from the session that could be applied to their work	75.0%	83.3%
Would recommend the session to a colleague	60.7%	83.3%

Councils reported that the BUDDIES sessions were informative and provided helpful learning opportunities. Participants noted that the sessions provided clear explanations and helpful resources that could support their work. Some participants indicated that the session content did not always meet the needs of all Councils. Some respondents felt the sessions were too introductory, while others found them too advanced.

“The information that's shared via the BUDDIES project has been invaluable. It's great to have this resource available to us.”

“The level of technical expertise needed to understand a lot of the research methods and concepts make them out of reach for many council staff.”

“This seemed [like a] very basic presentation...”

Councils expressed satisfaction with sessions that included practical demonstrations, tools, and examples they could apply directly to their work. Sessions focused on specific tools, such as Excel features and data visualization techniques, were particularly well received and helped Councils think more intentionally about how to present and communicate data to different audiences.

“The Excel mapping function and tutorial was fantastic.”

“This was a fantastic session that really helped me think more [intentionally] about how to best use graphics and charts based upon audiences and types of data being reported.”

Councils noted that their satisfaction with sessions increased when sessions were interactive and engaging. Activities that encouraged participation, such as games or interactive discussions, were viewed positively and helped participants stay engaged with the material. However, some Councils noted that activities could benefit from clearer introductions to help ensure participants understand the purpose of the session and remain engaged.

“Excellent training. I liked the Jeopardy game idea to encourage engagement and learning. Our Council will benefit from this training.”

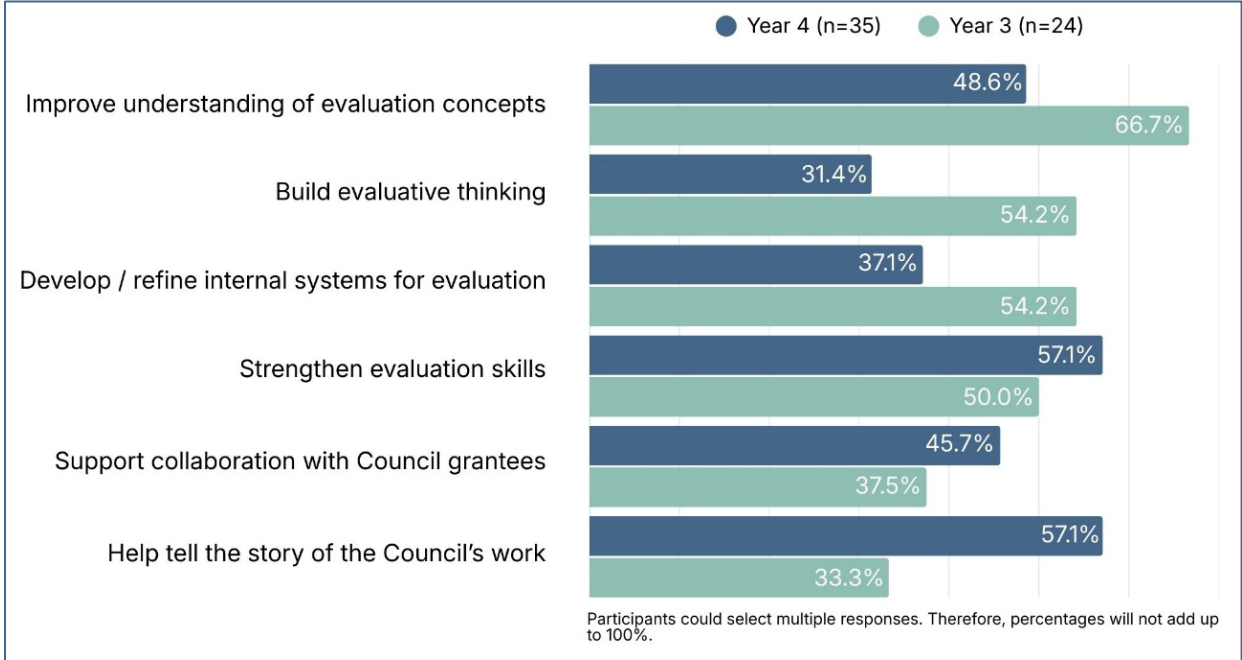
“If presenters could guide the conversation more by reminding participants of what we are doing, that will greatly improve the session.... People didn't participate at first, because we had to figure out what was going on.”

Meeting BUDDIES Objectives

As shown in Figure 2, the most commonly reported Council benefits in Year 4 were strengthening evaluation skills (57.1%) and helping Councils tell the story of their work (57.1%). Year 4 also saw a modest increase in the proportion of Councils reporting that sessions supported collaboration with Council grantees (45.7%), compared to Year 3. Several participants noted that the session on IRBs was particularly helpful in supporting their work with grantees. Participants who frequently fund universities reported that understanding IRB processes and timelines will help them better anticipate potential delays and ask more informed questions during future Request for Application (RFA) processes.

Compared to Year 3, fewer Councils reported that sessions improved their understanding of evaluation concepts, built evaluative thinking, or supported the development of internal evaluation systems. These results may reflect a shift in how participants experienced the Year 4 sessions, with sessions perceived as more applicable to practical skills, communicating evaluation findings, and supporting work with grantees.

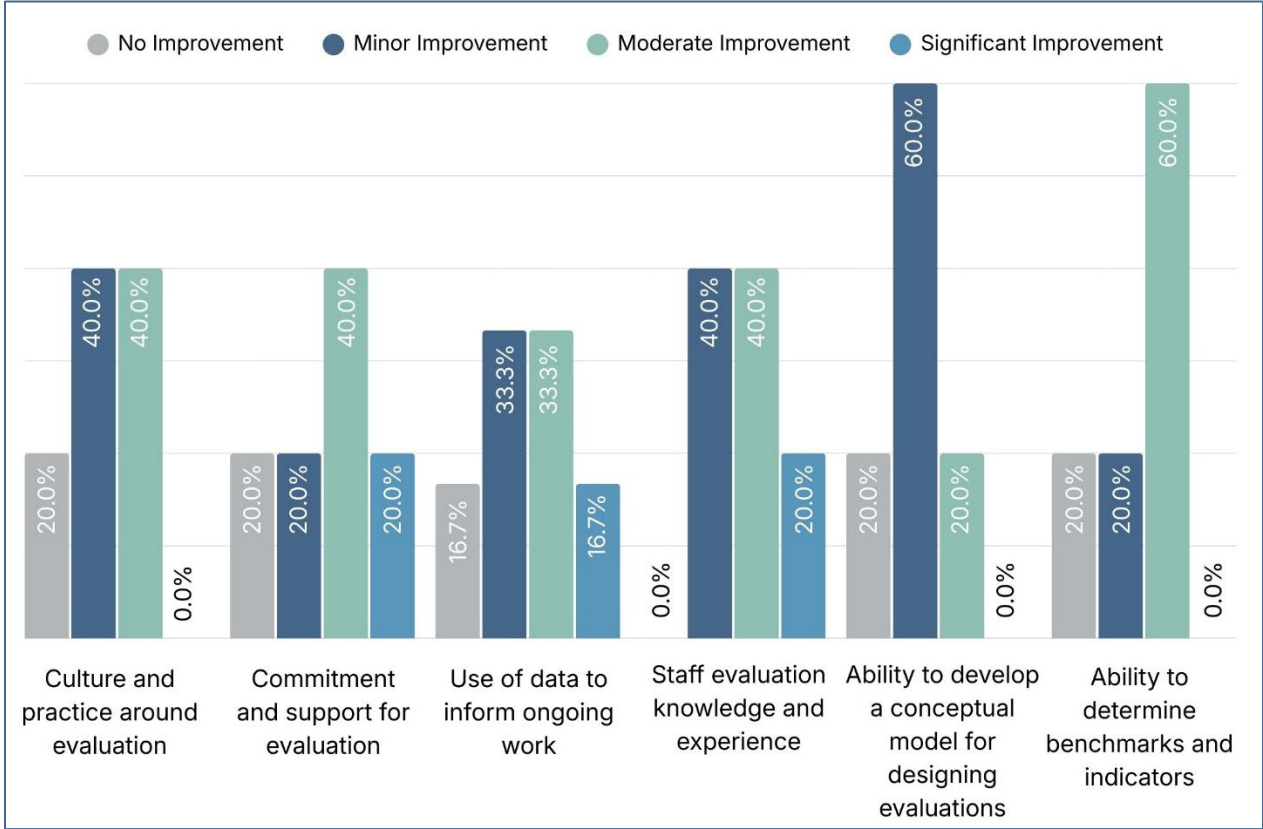
Figure 2. Councils’ Perspectives on the Overall Influence of BUDDIES Sessions – Year 3 vs. Year 4



Councils’ Organizational Evaluation Capacity

In Year 4, most Councils reported some level of improvement in organizational evaluation capacity across several areas (see Figure 3). Improvements were most frequently reported in staff evaluation knowledge and experience, ability to develop conceptual models for designing evaluations, and the ability to determine benchmarks and indicators. Councils also reported improvements in culture and practice around evaluation, use of data to inform ongoing work, and commitment for evaluation. Relatively few Councils reported no improvement, suggesting perceived gains in organizational evaluation capacity among respondents.

Figure 3. Influence of Year 4 BUDDIES Sessions on Councils’ Organizational Evaluation Capacity (n=5)



Change in Council Staffs’ Evaluation Competencies

In Year 4, most respondents reported improvements in evaluation competencies. Staff most commonly indicated some level of improvement in areas such as engaging local partners (80.0%) and community members in evaluation (80.0%), as well as analyzing data and assessing contextual factors that influence programs. All Year 4 respondents (100%) reported improvement in their ability to collect data and to report and share evaluation findings. Some staff also reported significant improvement in their ability to learn from evaluation findings. See Table 4.

Table 4. Influence of Year 4 BUDDIES Sessions on Council Staff's Individual Evaluation Competencies (n=5)

	NO IMPROVEMENT	SOME IMPROVEMENT	SIGNIFICANT IMPROVEMENT
Engaging local partners in evaluation	20.0%	80.0%	0.0%
Engaging community members in evaluation	20.0%	80.0%	0.0%

BUDDIES PROJECT

Year 4 Evaluation Technical Assistance and Training Report

	NO IMPROVEMENT	SOME IMPROVEMENT	SIGNIFICANT IMPROVEMENT
Assessing the contextual factors that may influence programs	40.0%	60.0%	0.0%
Describing programs	40.0%	40.0%	20.0%
Designing evaluations	0.0%	100.0%	0.0%
Collecting data	0.0%	100.0%	0.0%
Analyzing data	20.0%	80.0%	0.0%
Reporting and sharing findings	0.0%	100.0%	0.0%
Learning from evaluation findings	20.0%	60.0%	20.0%
Meeting federal requirements	20.0%	60.0%	20.0%

RECOMMENDATIONS

Year 4 feedback identified several areas to carry forward into future BUDDIES activities, particularly the need to more clearly connect session content to federal reporting requirements.

Council Staff Suggestions

The primary recommendation shared by Council staff in Year 4 was to more clearly align BUDDIES content with federal reporting requirements. While the BUDDIES Project is intended to strengthen Councils' evaluation knowledge, capacity, and skills, some participants reported difficulty applying the information when it was not directly connected to required reporting processes. Several Councils noted that information would be more useful if it was more closely aligned with reporting expectations, particularly the Program Performance Reports (PPRs).

“I continue to struggle with BUDDIES sessions because I do not feel they are an accurate reflection of the federally mandated PPR we are required to complete at the end of each year.”

“Tie evaluation methods directly to the outcomes listed in the PPR.”

Planned Activities

Year 5 of the BUDDIES Project will focus on providing targeted resources and guidance to help Councils apply evaluation practices within their ongoing work. Planned activities include the development of an evaluation plan guide, which will provide practical resources and guidance for Councils and will be presented during a BUDDIES session, followed by office hours to support implementation and address Council questions.

In addition, the BUDDIES Project will conduct an outcome evaluation using Ripple Effects Mapping, which will be facilitated as a final BUDDIES session to help identify and document the broader impacts of the Project.

Year 5 activities are intended to wrap up the evaluation training and technical assistance provided throughout the five-year BUDDIES Project and leave Councils with practical tools, guidance, and resources to support high-quality evaluation moving forward.

CONCLUSION

Overall, findings from the Year 4 evaluation activities suggest that the BUDDIES Project continues to provide meaningful support to Councils as they strengthen their evaluation capacity. Councils reported high levels of satisfaction with the Year 4 sessions, with most participants indicating that they were engaged during the sessions and that the information presented was relevant to their work. Participants highlighted the value of sessions that included practical tools, demonstrations, and interactive activities that could be applied

directly to their evaluation and reporting responsibilities. The development of resources such as the SAM Workshop Guide and the Survey Questions Bank also provided Councils with practical materials to support planning, data collection, and evaluation activities.

Findings also indicate continued progress in both organizational evaluation capacity and individual staff evaluation competencies. Organizationally, Councils reported improvements in several areas, including staff evaluation knowledge and experience, the ability to develop conceptual models for evaluations, and the use of data to inform program activities. At the individual level, staff reported improvements in collecting and analyzing data, engaging partners in evaluation, and communicating evaluation findings. While Councils generally valued the training and resources provided through the BUDDIES Project, some participants noted opportunities to further strengthen the connection between session content and federal reporting requirements. This feedback offers a useful direction for future BUDDIES activities and resource development.

LIMITATIONS

Council representation. Although all Councils were invited to attend the Year 4 BUDDIES sessions, access resources, and participate in the annual evaluation activities, participation was voluntary. As a result, not all DD Councils took part in the BUDDIES Project offering. Consequently, the perspectives of some Councils and their staff are not reflected in these findings, and the Year 4 evaluation results may not fully represent the experiences of all Councils.

Time. Building evaluation capacity is an ongoing process and is unlikely to produce substantial changes in skills, competencies, and organizational practices in a short period of time. Capacity-building efforts require sustained participation and engagement in learning activities. Therefore, this evaluation focuses on understanding how the BUDDIES sessions may have contributed to Councils' evaluation capacity and competencies to date, while recognizing that both individual- and organizational-level outcomes may continue to develop over time.

External context. During Year 4, Councils continued to operate within a broader federal environment in which priorities and processes evolved over time. These contextual factors may have influenced how Councils engaged with BUDDIES sessions or the extent to which they were able to apply the information to their evaluation activities during the reporting period. As such, Year 4 findings should be interpreted with the understanding that external factors may have influenced how capacity-building efforts were experienced and implemented by Councils.

REFERENCES

Administration on Intellectual and Developmental Disabilities. (2021). About AIDD. U.S. Department of Health and Human Services. <https://www.acl.gov/about-acl/administration-intellectual-and-developmental-disabilities-aid>

Developmental Disabilities Assistance and Bill of Rights Act of 2000, 42 U.S.C. §§ 15001 et seq. (2000). <https://www.congress.gov/bill/106th-congress/house-bill/5658/text>

Morariu, J. (2012). Evaluation Capacity Building: Examples and Lessons from the Field. Innovation Network.

Patton, M. Q. (2011). Developmental Evaluation: Applying Complex Concepts to Enhance Innovation and Use. New York, NY: Guilford Press.

Scheirer, M. (2005). Is Sustainability Possible? A Review and Commentary on Empirical Studies of Program Sustainability. American Journal of Evaluation, 26(3). <https://doi.org/10.1177/1098214005278752>

Stufflebeam, D.L., & Shinkfield, A.J. (2007). Evaluation Theory, Models, and Applications. San Francisco, CA: Jossey-Bass.