

Evaluation Capacity Building: Considerations

Evaluation capacity building (ECB) can be delivered in many ways, from one-off workshops, to one-on-one coaching, to multi-contact group trainings. Regardless of the type or intensity of the engagement, below we compiled considerations from our positive and less-than-positive experiences traveling this road.

Know about your audience

Learning about the organizations we are engaging with includes making time to build relationships and assessing individual and organizational capacity.

- **Make time to build relationships, regardless of type and intensity of engagement.** Whether through a quick ice breaker or a pre-training assessment, build comfort and trust that facilitates learning.
- **Recognize pain points and expertise.** Find out who is going to be in the room and their needs or pain points regarding evaluation. Likewise, recognize and leverage individual knowledge and experience in training and ongoing support to encourage continued peer learning.
- **Assess organizational readiness and leadership involvement and investment.** Identify why the organization is investing in ECB at this point and assess capacity to engage. Is it seen as a “quick fix” to an urgent need such as creating a Theory of Change for a grant proposal or is it a longer-term commitment to developing a learning culture? Depending on length and type of engagement, consider using available assessment tools or develop your own.

In context: We were hired to conduct a one-off evaluation training. We had no prior connections to participants, with minimal incentive to build them. Furthermore, participants associated us with their funding organization. Prior to the training, we surveyed participants about their needs to better understand their starting point in evaluation and to inform our approach. During the training we explicitly addressed these needs and were careful to disassociate ourselves from the funder, promising confidentiality. These efforts helped create a more trusting, transparent relationship that enabled us to meet participants where they were.

Facilitate learning

The type of ECB, whether a standalone workshop to a longer-term engagement, is most likely dictated by budget and/or time. The more ECB can address felt needs and be designed as an interactive process built on adult learning principles, the greater chance participants will find it valuable in spite of constraints.

- **Logistics matter.** As much as possible, schedule ECB in the morning to avoid after lunch slump and choose a meeting space large enough to facilitate interactive learning exercises.
- **Good facilitation skills are important.** It’s not just the content, it’s also how it is being delivered that will determine success. Be aware of energy level in the room and be prepared to change up the agenda or break for quick energizers.
- **Less is more.** Resist the temptation of covering too much material. Consider what can realistically be absorbed by participants considering their level of knowledge and the amount of time you

have. If the group includes a diverse level of evaluation knowledge and skills, use break out groups to target learning.

- **Freely share resources and materials.** At a minimum, share materials used during the workshop and point participants to other helpful resources either as handouts or in digital format.

In context: As part of a 3-year ECB grant, participating organizations received decreasing hours of individualized support. Each year, all organizations participated in a half-day workshop on developing a logic model. We struggled to maintain momentum with lower capacity organizations who were already overwhelmed with their work. The longer-term engagement allowed us to better understand the organizations and create tools that were culturally relevant and feasible to the organization’s capacity.

Table 1 | Facilitators and Challenges to ECB

Type of ECB	Facilitators for Success	Challenges to be Addressed
Optional workshop/training	<ul style="list-style-type: none"> • ECB is tied to specific work, e.g. a new grant, the beginning of an evaluation • Leadership buy-in • Multiple engagements • Time and resources for pre-assessment 	<p>If ECB a one-off training with no pre-assessment or follow up built-in, start with interactive activity to create common ground and identify felt needs</p> <p>If not a priority for organization, get concrete quickly so participants can see relevance and benefit to specific work</p>
Required workshop/training	<ul style="list-style-type: none"> • Same as above 	<p>If participants are not bought in even if leadership may be, include trust building activities around relevant work</p> <p>Refer to pre-assessment to demonstrate how learning is tied to participant needs</p>
One on one consultation	<ul style="list-style-type: none"> • Same as above 	<p>If workload or low priority makes it difficult for participants to schedule consultation and maintain momentum, consider very brief sessions to support a discreet task</p>
Combination training and coaching	<ul style="list-style-type: none"> • Same as above • Long term engagement 	<p>If ECB gets lost in other work during a long-term engagement, making it challenging to build on previous learnings, consider timing and how to tie learning to specific needs, such as data collection or data needed for a decisions, facilitating an organizational learning or planning process such as a theory of change.</p>