

# BUILDING PRACTICE

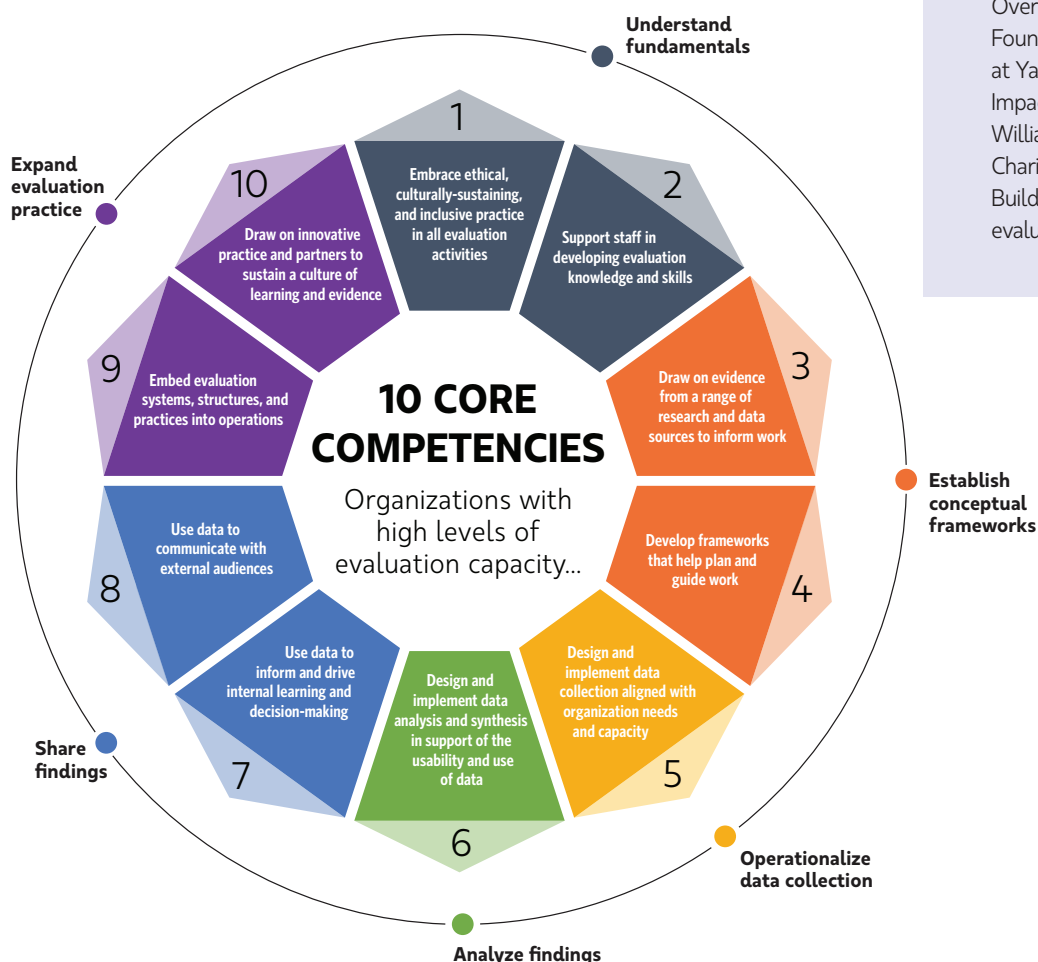
## Across 10 Evaluation Capacity Competencies

In the social sector, we use the term “evaluation” to describe a wide range of learning, reporting, and data management practices. Whenever we develop insights and use those insights to drive change, we engage in evaluation. Evaluation can be qualitative and quantitative, formal and informal; it can produce dashboard-style snapshots and academic articles; and it can serve as a vehicle for learning through challenges and sharing positive results.

**We offer this holistic framework of 10 core evaluation competencies, complete with specific practice examples, to establish a common reference point for the multitude of activities that evaluation capacity in organizations include.**

The various forms and paths of evaluation highlighted in this framework offer the potential for supporting **better data, ideas, programs, and organizations**. Evaluation provides us with a touchstone and toolkit for routine reflection and development of knowledge that can **drive positive social impact**.

At its best, evaluation becomes part of the culture of teams and organizations, serving as a pillar to the work rather than an appendage. We hope this tool helps organizations reflect on, develop, and further integrate evaluation capacity, and ultimately actualize the potential evaluation offers.



Over the last year, The Scattergood Foundation and The Consultation Center at Yale have partnered with the Social Impact Collaborative, supported by the William Penn Foundation, and The Pew Charitable Trusts’ Evaluation Capacity Building Initiative to establish this set of evaluation capacity building competencies.

## Understand Fundamentals

**COMPETENCY 1: Organization embraces ethical, culturally-responsive, and inclusive practice in all evaluation activities.**

### SAMPLE PRACTICES

- Place race and culture at the center of evaluation conversations
- Pay explicit attention to how team and participant racial and cultural identities influence the work
- Include research and data that explore race and culture in similar programs
- Integrate data collection activities in ways that minimize burden and harm to participants and maximize participation of diverse groups

**COMPETENCY 2: Core or multiple staff have evaluation knowledge and skills.**

### SAMPLE PRACTICES

- Engage multiple staff in developing evaluation knowledge and skills
- Recognize the need for broader organizational shifts to sustain a culture of evaluation and learning
- Include organization leaders, program staff, development staff members, and those in data/evaluation roles in the evaluation process

## Establish Conceptual Frameworks

**COMPETENCY 3: Organization draws on evidence from a range of research and data sources to inform work.**

### SAMPLE PRACTICES

- Use existing community research and data to deepen understanding of community context, target populations, and broader environment
- Integrate research about relevant evidence-based and promising practices
- Reflect on progress and impact data of similar organizations and programs to create benchmarks
- Engage in primary data collection to close gaps in knowledge about communities and stakeholders

**COMPETENCY 4: Organization develops frameworks that help plan and guide work.**

### SAMPLE PRACTICES

- Develop logic models and theories of change that articulate program expectations and guide more complex sets of activities across programs and the organization
- Create frameworks through collaborative processes that include the perspective and experience of various stakeholders, as well as diverse research and data sources (see Competency 3 on left)
- Use frameworks as tools to set clear implementation and impact goals at an organization level

## Operationalize Data Collection

**COMPETENCY 5: Data collection tools and systems align with organization needs and capacity.**

### SAMPLE PRACTICES

- Align data collection tools and systems with clear research questions that reflect expectations highlighted in logic models and theories of change
- Adapt and use data collection tools validated by other organizations and programs
- Empower and engage operational staff in the development and design of data collection tools and processes
- Dedicate staff time to data collection and entry, as well as data management and monitoring
- Consciously align data collection processes to organizational systems, including technology, that match the needs and the capacity of the organization

## Analyze Findings

### **COMPETENCY 6: Data analysis and synthesis tools support the usability and use of data.**

#### **SAMPLE PRACTICES**

- Empower operational staff to identify guiding analyses and research questions that align with conceptual frameworks
- Draw on a variety of analysis techniques to make use of the full range of qualitative and quantitative data collected
- Develop and customize data reports and visualizations that offer timely analyses and meet varied stakeholder needs across the organization
- Dedicate staff time to analyzing and synthesizing information using organization's analysis tools
- Consciously align data analysis processes and tools with the organization's capacity and needs

## Share Findings

### **COMPETENCY 7: Organization uses data to inform and drive internal learning and decision-making.**

#### **SAMPLE PRACTICES**

- Develop processes and structures that ensure stakeholders across the organization have access to data analyses and opportunities for developing insights from data
- Empower and encourage staff to regularly use data to ask and seek answers to questions that can inform practice
- Dedicate staff time to plan for and facilitate data use across different roles
- Refine data collection activities through regular reviews of data quality and relevance
- Develop and use a common set of organization-level implementation and impact measures to track progress across programs

### **COMPETENCY 8: Organization uses data to communicate with external audiences.**

#### **SAMPLE PRACTICES**

- Develop processes and structures that elevate internal learning for external sharing
- Develop information-sharing strategies that consider multiple stakeholders (e.g., participants, front-line staff, funders, and colleagues in the field) and multiple communication mediums (e.g., meetings, dashboards, articles, reports, videos, conceptual frameworks)
- Use both qualitative and quantitative data and evaluation to communicate with external audiences across different phases of the work, e.g., design, implementation, results/impact
- Dedicate staff time to developing products that tell the story of the organization, its programs, and its implementation experiences

## Explain Evaluation Practice

### **COMPETENCY 9: Organization embeds evaluation systems, structures, and practices into operations.**

#### **SAMPLE PRACTICES**

- Commit leadership to developing an organizational culture of evaluation
- Support individuals within the organization who champion and cultivate evaluation practices
- Integrate evaluation and data roles and responsibilities into the tasks of multiple staff members
- Sustain investments in evaluation capacity, including through dedicated staff time, professional development opportunities, and technology-based collection and analysis systems (Highlighted in Competencies 5-8)
- Include budget lines that support evaluation and data use when applying for new grant opportunities
- Advocate with funders to support evaluation capacity

### **COMPETENCY 10: Organization draws on innovative practice and partners to sustain a culture of learning and evidence.**

#### **SAMPLE PRACTICES**

- Develop an organization-level learning strategy and holistic plan for evaluation activities
- Use varied cycles of evaluation (e.g., rapid cycle and longitudinal, process and impact) to drive learning across programs and the organization
- Actively engage in professional fields, such as evaluation and change management, to support greater connection between theory and applied practice
- Connect with external evaluators and researchers to drive more rigorous research
- Connect with other organizations to share data and evaluate collective efforts