

[Manage an evaluation or evaluation system](#)

Managing an evaluation involves agreeing on how decisions will be made for each cluster of the evaluation (from framing an evaluation to reporting and supporting use) and ensuring they are implemented well.

As you work through the process of planning and implementing the evaluation, you may need to revisit and revise the choices you have made.

[Understand and engage stakeholders](#)

Stakeholders are people with a stake in the evaluation, including primary intended users and others.

Understanding and taking into account the priorities and concerns of different stakeholders informs evaluation planning, communication strategies during and after the evaluation and supports the utilisation of evaluation findings.

The primary intended users - people who will be making decisions on the basis of the evaluation findings - are a key group of stakeholders. ([Identifying primary intended users](#) is its own important task).

Other stakeholders include people who will be affected by decisions made during or after the evaluation (program staff, program participants and beneficiaries) and secondary users of the evaluation findings. Evaluation findings are often of interest to policy makers and advocates for or against a particular course of action.

Different stakeholders can be engaged for different purposes and at different phases of evaluation planning and implementation. It may not be feasible or appropriate to engage all potential stakeholders.

Involving stakeholders during evaluation planning and implementation can add value by:

- providing perspectives on what will be considered a credible, high quality and useful evaluation
- contributing to the program logic and framing of key evaluation questions
- facilitating quality data collection
- helping to make sense of the data that has been collected
- increasing the utilization of the evaluation's findings by building knowledge about and support for the evaluation.

Engaging stakeholders is also important for managing risks especially when evaluating a contentious program or policy in which key stakeholders are known to have opposing views. It is important to understand different perspectives on what will be considered credible evidence of outcomes and impacts.

Methods

Understand stakeholders

- [Community scoping](#)

Community profiles are good for developing a more in-depth understanding of a community of interest.

- [Existing documents](#)

Reviewing documents produced as part of the implementation of the evaluand can provide useful background information and be beneficial in understanding the alignment between planned and actual implementation.

- [Stakeholder mapping and analysis](#)

Stakeholders are individuals or organizations that will be affected in some significant way by the outcome of the evaluation process or that are affected by the performance of the intervention, or both.

Engage stakeholders

- [Community fairs](#)

A community fair is an event organised within the local community with the aim of providing information about a project and raising awareness of relevant issues.

- [Fishbowl technique](#)

The fish bowl activity is used to manage group discussion.

- [Formal meeting processes](#)

Studies have demonstrated that attendance at meetings and conferences, planning discussions within the project related to use of the program evaluation, and participation in data collection foster feelings of evaluation involvement among stakeholders (T

- [Informal meeting processes](#)

Informal meetings can simply be a conversation between an evaluator and a key stakeholder that is not conducted in a formal way.

- [Launch workshop](#)

A launch workshop is a meeting of key stakeholders to both assess and build readiness for evaluation.

Establish decision making processes

A variety of groups may be established within the governance structure in order to advise on the evaluation.

Evaluation decisions are often made by a steering committee, with representatives from different stakeholder groups. An expert or technical reference group or an advisor with specific expertise might provide targeted advice. A diverse range of stakeholders with different perspectives might also be consulted about the scope of the evaluation or on specific issues such as the accuracy of the program logic or the interpretation of findings.

Control may be centralized in a specific manager or committee or it may be shared by a working party involving representatives from many different stakeholders.

It is important to be clear about the roles and responsibilities of steering committees and other stakeholders. They might have the following roles:

- Advise - review material and make suggestions to others who make the decisions
- Recommend - review material and suggestions and make recommendations to others who make the decisions
- Decide - have final control over decisions in the evaluation

Methods

Types of structures

- [Advisory group](#)

An advisory group can be established to provide advice on an individual evaluation, a series of evaluations, or the evaluation function within an organization.

- [Citizen juries](#)

Citizen juries are a method to engage citizens from the wider community in decision-making processes.

- [Steering group](#)

Evaluation management often involves a steering group, which makes the decisions about the evaluation. It is important to distinguish between a steering group (which makes decisions) and an advisory group (which provides advice).

Ways of exploring issues

- [Formal meeting processes](#)

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- [Informal meeting processes](#)

Informal meetings can simply be a conversation between an evaluator and a key stakeholder that is not conducted in a formal way.

- [Round robin](#)

The “round robin” method is a technique for generating and developing ideas in a group brainstorming setting.

- [Six thinking hats](#)

The Six Thinking Hats method encourages participants to cycle through six different ways of thinking, using the metaphor of wearing different conceptual “hats”.

Ways of making decisions

- [Consensus decision making](#)

Consensus decision is a decision-making method that involves reaching agreement between all members of a group with regards to a certain issue.

- [Hierarchical decision making](#)

Hierarchical decision-making involves making decisions based on formal positions of authority.

- [Majority decision making](#)

Majority decision-making involves making decisions based on the support of the majority of the decision-makers.

Approaches

- [Participatory evaluation](#)

Participatory evaluation is an approach that involves the stakeholders of a programme or policy in the evaluation process.

Decide who will conduct the evaluation

Evaluations can be conducted by a range of different actors including: external contractors; internal staff; those involved in delivering services; by peers; by the community; and by a combined group.

Therefore it is important to make decisions about who is best to conduct the evaluation.

Consider the relative importance of different types of expertise. Relevant expertise may include skills and knowledge in evaluation, in the specific domain (eg education) or program (e.g. delivering health services), or the local culture and context.

Consider the balance of distance and involvement that will be most suitable and that will support use of the evaluation findings. An external, unaligned evaluator may be viewed as more (or less) credible by different stakeholders. Involving staff and communities may be important for supporting cultural change, knowledge building and supporting the utilization of the evaluation findings.

Different management tasks arise depending on who is involved in which evaluative activities. For example, when using an external evaluator you will need to develop a process for selecting and managing them. If internal staff and/or intended beneficiaries are involved there may be a need to ensure processes are well documented and that relevant training in specific evaluation options is conducted to ensure that quality and ethical standards are maintained.

Decisions about who will conduct an evaluation, or components of an evaluation, will also be informed by timelines, resources, and the purpose of the evaluation.

Methods

- [Community](#)

The community, particularly intended beneficiaries of an intervention, can undertake an evaluation or contribute to a combined team.

- [Expert review](#)

Expert review involves an identified expert providing a review of draft documents at specified stages of a process and/or planned processes.

- [External consultant](#)

An external consultant is someone external to the organization who is contracted to conduct the evaluation.

- [Hybrid - internal and external staff](#)

A hybrid evaluation involves both internal and external staff working together.

- [Internal staff](#)

Conducting an evaluation using staff from the implementing agency rather than hiring external consultants.

- [Joint evaluation design](#)

A collaboration is involved in designing the evaluation, which might involve an implementing agency, an evaluation team and/or a community working together.

- [Learning alliances](#)

Learning alliances involve a structured partnership between two or more organisations with the aim of working together to build and share knowledge around topics of mutual interest.

- [Peer review](#)

Conducting an evaluation using individuals/organizations who are working on similar projects.

Approaches

- [Horizontal evaluation](#)

Horizontal evaluation is an approach that combines self-assessment by local participants and external review by peers.

- [Positive deviance](#)

Positive deviance (PD), a behavioural and social change approach, involves learning from those who find unique and successful solutions to problems despite facing the same challenges, constraints and resource deprivation as others.

- [Participatory evaluation](#)

Participatory evaluation is an approach that involves the stakeholders of a programme or policy in the evaluation process.

Resources

Guides

- [NSW Government evaluation toolkit](#)

This web-based toolkit has been developed to help program managers in New South Wales (Australia) government agencies manage evaluations (including those undertaken by internal or external evaluators, or by a combination of both).

- [Key considerations for managing evaluations](#)

This guide from Pact South Africa is aimed at providing an overview of the key considerations that need to be assessed before and during the evaluation process.

- [The program manager's guide to evaluation](#)

This comprehensive guide from the US Administration for Children and Families provides a step-by-step outline of the evaluation process from purpose to reporting.

Blog post

- [Is independence always a good thing?](#)

This blog post from Howard White (May 1, 2014) argues that the benefits of an independent evaluation team can sometimes be overstated. He presents three arguments to support this contention: Institutional independence does not necessarily safeguard against biases toward positive evaluation; independence comes at a cost; and what agency evaluation departments do is only a small part of the evaluation story.

[Determine what constitutes high quality evaluation](#)

For any evaluation, there needs to be clarity about what will be considered a quality and ethical evaluation.

Different criteria can be used to determine what constitutes a good quality evaluation, including ethical practice. The options listed below are different criteria that can be used to define what constitutes high-quality evaluation. They are sometimes labelled as evaluation standards or norms.

These can be operationalised through processes and tools. You can read about various ways of doing this on the page [Review Evaluation Quality](#).

Methods

Criteria relating to products

- [Accessibility](#)

Accessibility of evaluation products includes consideration of the format and access options for reports, including plain language, inclusive print design, material in multiple languages, and material in alternative formats (such as online, audio, or braille).

- [Accuracy](#)

Accuracy refers to the correctness of the evidence and conclusions in an evaluation. It may have an implication of precision.

- [Credibility](#)

Credibility refers to the trustworthiness of the evaluation findings, achieved through high-quality evaluation processes, especially rigour, integrity, competence, inclusion of diverse perspectives, and stakeholder engagement.

- [Transferability](#)

Transferability involves presenting findings in a way that they can be applied in other contexts or settings, considering the local culture and context to enhance the utility and reach of evaluation insights.

Criteria relating to processes

- [Bias reduction](#)

Bias reduction involves identifying possible sources of bias and taking steps to reduce it. This is one way of improving the validity of an evaluation.

Types of bias include:

- [Common good and equity](#)

Consideration of common good and equity involves an evaluation going beyond using only the values of evaluation stakeholders to develop an evaluative framework to also consider common good and equity more broadly.

- [Competence](#)

Competence refers to ensuring that the evaluation team has or can draw on the skills, knowledge and experience needed to undertake the evaluation.

Competence is one of the guiding principles of the American Evaluation Association:

- [Cultural competency](#)

Cultural competency involves ensuring that evaluators have the skills, knowledge, and experience necessary to work respectfully and safely in cultural contexts different from their own.

- [Ethical practice](#)

Ethical practice in evaluation can be understood in terms of designing and conducting an evaluation to minimise any potential for harm and to maximise the value of the evaluation.

- [Evaluation accountability](#)

Evaluation accountability relates to processes in place to ensure the evaluation is carried out transparently and to a high-quality standard.

- [Feasibility](#)

Feasibility refers to ensuring that an evaluation can be realistically and effectively implemented, considering factors such as practicality, resource use, and responsiveness to the programme's context, including factors such as culture and politics.

- [Human rights and gender equality](#)

Human rights and gender equality refer to the extent to which an evaluation adequately addresses human rights and gender in its design, conduct, and reporting.

- [Impartiality](#)

Impartiality in evaluation refers to conducting an evaluation without bias or favouritism, treating all aspects and stakeholders fairly.

Key aspects of impartiality in evaluation can include:

- [Inclusion of diverse perspectives](#)

Inclusion of diverse perspectives requires attention to ensure that marginalised people and communities are adequately engaged in the evaluation.

- [Independence](#)

Independence can include organisational independence, where an evaluator or evaluation team can independently set a work plan and finalise reports without undue interference, and behavioural independence, where evaluators can conduct and report evaluati

- [Integrity](#)

Integrity refers to ensuring honesty, transparency, and adherence to ethical behaviour by all those involved in the evaluation process.

Integrity is one of the guiding principles of the American Evaluation Association:

- [Professionalism](#)

Professionalism within evaluation is largely understood in terms of high levels of competence and ethical practice.

- [Propriety](#)

Propriety refers to ensuring that an evaluation will be conducted legally, ethically, and with due regard for the welfare of those involved in it and those affected by its results.

- [Respect for people](#)

Respect for people during an evaluation requires those engaged in an evaluation to respect the security, dignity, and self-worth of respondents, program participants, clients, and other

evaluation stakeholders.

- [Rigour](#)

Rigour involves using systematic, transparent processes to produce valid findings and conclusions. There are significant differences in what this is understood to mean in evaluation.

- [Strengthening national evaluation capacities](#)

Strengthening national evaluation capacities refers to the ways in which an evaluation can have broader value beyond a single evaluation report by increasing national capacities.

- [Systematic inquiry](#)

Systematic inquiry involves thorough, methodical, contextually relevant and empirical inquiry into evaluation questions.

Systematic inquiry is one of the guiding principles of the American Evaluation Association:

Systematic Inquiry

- [Transparency](#)

Transparency refers to the evaluation processes and conclusions being able to be scrutinised.

- [Utility](#)

Utility standards are intended to increase the extent to which program stakeholders find evaluation processes and products valuable in meeting their needs.

- [Validity](#)

Validity refers to the extent to which evaluation findings are correct.

In the Evaluation Standards produced by the Joint Committee on Educational Evaluation, standards relating to this were labelled as Accuracy Standards:

Resource

- [What counts as good evidence?](#)

This paper, written by Sandra Nutley, Alison Powell and Huw Davies for the Alliance for Useful Evidence, discusses the risks of using a hierarchy of evidence and suggests an alternative in which more complex matrix approaches for identify

Determine and secure resources

The purpose and scope of the evaluation needs to be considered when determining the budget.

The amount of resources available may influence the level of an evaluation's rigor or the certainty of its findings. The importance of the program, existing knowledge about the program from previous evaluations and the decisions to which the evaluation will contribute are important factors to consider.

A program that has been thoroughly tested in a context similar to the current implementation setting may require fewer resources to satisfy information needs. A higher proportion of funds may be warranted for:

- Evaluations that will contribute to important decisions, such as whether to roll out a program on a large scale
- Evaluations that require highly defensible findings or will come under scientific scrutiny
- Programs that have not been evaluated before

Very often the available resources (time, money and expertise) will restrict the scope of the evaluation (the number of questions, size of the sample, data collection and analysis options) or influence the choice of evaluation designs. Some organizations have a policy of setting aside a certain percentage of the total program budget for evaluation. Organizations often use a "rule of thumb" to specify considerations in making a budget estimate. Common budget estimates range between 5 - 20% of program costs.

When commissioning an evaluation it is wise to start the budgeting process by consulting with the budget, procurement and/or human resource offices within the organization in order to verify and understand budget process, rules, and stipulations. Engage project staff, stakeholders, and M&E staff or professionals to ensure that the budget is comprehensive and accurate.

The process of developing an evaluation budget may be an excellent opportunity to encourage stakeholders to agree on the value of the evaluation and the amount and type of resources necessary to support it. Sometimes after intended users are engaged and the evaluation purpose and questions decided there is scope to add additional resources in order to undertake the type of evaluation that is required.

Budgets are just as critical for planning an internal evaluation as an external one. Although an internal evaluation draws primarily from resources within the organization, getting agreement on available resources will ensure the evaluation runs much more smoothly. For example, staff may be more flexible than consultants, but developing an accurate calculation of staff time costs early in the process helps to enlist their commitment.

Methods

Determine resources needed

- [Evaluation budget matrix](#)

An evaluation budget matrix specifies various items that need to be costed as individual line items.

- [Evaluation costing](#)

Evaluation expenses are highly situational and there are no magic formulas for calculating costs.

- [Resources stocktake](#)

The resources available for evaluation include people's time and expertise, equipment and funding.

Secure resources needed

- [Designated staff time for evaluation](#)

This strategy for securing sufficient resources for conducting evaluation involves allocating a specified amount of staff time (hours or days per week) to work on evaluation.

- [Grant funding for evaluation](#)

You may also consider approaching a foundation or other donor agency for the funds to undertake an evaluation.

- [Work with universities to staff the evaluation](#)

This strategy requires management leadership and uses the rule of thumb approach to estimate the percentage of project funds to spend on evaluation which could be done more accurately by developing an initial evaluation budget.

- [Institutionalized budget allocation](#)

This strategy requires management leadership and uses the rule of thumb approach to estimate the percentage of project funds to spend on evaluation.

This could be done more accurately by developing an initial evaluation budget.

- [Leveraged partnerships to carry out the evaluation](#)

As many projects are undertaken by a consortium of organisations working together, sometimes it is worthwhile to consider approaching your implementing partners to pool resources and carry out the evaluation jointly.

- [Strategies to reduce costs](#)

Reducing costs is something to consider if evaluation costs outweigh the predicted benefits or available resources.

Document management processes and agreements

It is important to document decisions about the management of evaluative activities, including any processes for monitoring compliance with ethical and quality standards during the evaluation.

These documents will also ensure that different stakeholders, whether funders, partner organisations, communities or expert advisors are clear about what is being done, how and when, and their responsibilities and accountabilities for the evaluation.

Different organisations have different forms of documents and different labels for the document that describes what is to be done - the purpose, Key Evaluation Questions and timeline.

Sometimes this document is referred to as Terms of Reference (ToR), Scope of Work (SOW), Statement of Work (SOW), Request for Proposal (RFP), Request for Quotation (RFQ), Invitation To Tender (ITT) or the evaluation brief.

This document can be used for any type of evaluation (internal, external, self-evaluation) but they are particularly useful as part of the process of engaging an external evaluator.

Other types of documents might be developed to formalise the relationships between different organisations working together on the evaluation. These could include a Memorandum of Understanding or a Contractual Agreement.

Methods

Document what is needed in an evaluation

- [Expression of interest](#)

An expression of interest (EoI) is a way for an organisation to publish its intention to appoint an evaluation team to conduct an evaluation of a specific project or program.

- [Request for proposal \(RFP\)](#)

A Request for Proposal (RFP) is a formal request for evaluators to prepare a response to a planned evaluation and are generally used to select the final evaluator for the evaluation.

- [Scope of work](#)

A Scope of Work (SOW) is a plan for conducting an evaluation which outlines the work that is to be performed by the evaluation team.

- [Terms of reference](#)

A Terms of Reference (ToR) document provides an important overview of what is expected in an evaluation.

Document how different organisations will work together

- [Contractual agreement](#)

A formal contract is needed to engage an external evaluator and a written agreement covering similar issues can also be used to document agreements about an internal evaluator.

- [Memorandum of understanding](#)

A Memorandum of Understanding (MOU) outlines an agreement between two collaborating bodies in order to identify the working relationships and guidelines that exist between them.

Develop planning documents for the evaluation or M&E system

An [evaluation plan](#) (for a particular evaluation) usually specifies: what will be evaluated; the purpose and criteria for the evaluation; the key evaluation questions; and how data will be collected, analyzed, synthesized and reported. It may include a program theory/logic model.

An [evaluation framework](#) (sometimes called a Monitoring and Evaluation framework, or more recently a Monitoring, Evaluation and Learning framework) provides an overall framework for evaluations across different programs or different evaluations of a single program (e.g. process evaluation; impact evaluation). This can include guidance on data sources and management processes, as well as an overall program theory/logic model.

However sometimes the term 'evaluation framework' is used to refer to a plan for a single evaluation or to an organisational policy.

Methods

- [Aide memoire](#)

An aide-memoire generally refers to a document that is produced to summarise key findings and important recommendations of an evaluation.

- [Evaluation framework](#)

An evaluation framework (sometimes called a Monitoring and Evaluation framework, or more recently a Monitoring, Evaluation and Learning framework) provides an overall framework for evaluations across different programs or different evaluations of a sing

- [Evaluation plan](#)

An evaluation plan sets out the proposed details of an evaluation - what will be evaluated, how and when.

- [Evaluation work plan](#)

An evaluation work plan involves the development of clear timeframes, deliverables and milestones.

- [Inception report](#)

An inception report of an evaluation is prepared by an evaluator after an initial review of relevant documentation.

[Review evaluation quality](#)

Evaluating the quality of an evaluation can be done before it begins (reviewing the plan) or during or after the evaluation (reviewing the evaluation products or processes). This is sometimes called a quality review or meta-evaluation.

Some organisations require formal review of evaluations at specific stages. This is often focused on the evaluation design or plan, the inception report (which might include revising the evaluation design), and the evaluation report or reports. Knowing that specific outputs, such as an evaluation plan, will be subject to external scrutiny can also improve its quality.

Reviewing the evaluation plan and inception report can potentially improve the quality of the evaluation, as it is still possible to revise the design and implementation plans.

Reviewing the evaluation report can lead to improvements in how messages are communicated but there is often limited ability to address any deficiencies in the evaluation. It can however ensure that the key messages from the evaluation are clear and consistent with the findings. A formal review of an evaluation report can be particularly important where its findings are likely to be contentious.

Reviewing the evaluation will also help to identify how key messages may be interpreted, if there are any concerns about the methodology that need to be discussed, and possible ways that the findings will be used. Being mindful of how the evaluation findings could be received helps in presenting the findings in a way that is likely to support use.

Involving the primary intended users and other key stakeholders in a review of the evaluation also supports the use of the evaluation findings by building the 'personal factor' - the involvement of people who care about the evaluation and how the findings will be used.

The options listed below are different processes and tools for evaluating evaluations. The criteria for evaluating evaluations are shown on the page [Determine what constitutes high-quality evaluation](#).

Methods

- [Advisory group](#)

An advisory group can be established to provide advice on an individual evaluation, a series of evaluations, or the evaluation function within an organization.

- [Ethical guidelines](#)

Ethical guidelines are designed to guide ethical behaviour and decision-making throughout evaluation practice.

- [Evaluation standards](#)

Evaluation standards identify how the quality of an evaluation will be judged. They can be used when planning an evaluation as well as for meta-evaluation (evaluating the evaluation).

- [Expert review for meta-evaluation](#)

An expert review involves experts reviewing the evaluation, drawing in part on their expertise and experience of the particular type of program or project.

- [Group critical reflection](#)

This method involves facilitating group stakeholder feedback sessions on evaluation findings.

- [Individual critical reflection](#)

This method involves facilitating independent feedback from particular individual stakeholders.

- [Institutional review board](#)

Institutional Review Boards (IRBs) are committees that are set up by organizations to review the technical and ethical dimensions of a research or evaluation project.

- [Peer review for meta-evaluation](#)

Reviewing the evaluation by using peers from within or outside of the organisation.

- [Validation workshop](#)

A validation workshop is a meeting that brings together evaluators and key stakeholders to review an evaluation's findings.

[Strengthen evaluation capacity](#)

An important aspect of monitoring and evaluation (M&E) 'systems' is strengthening the M&E capacity of individuals, organisations, communities and networks.

While there are other terms used for this, we suggest using the term 'evaluation capacity strengthening' to emphasise the value of recognising, reinforcing and building on existing capacity.

Understanding capacity

M&E capacity is not just about developing competencies for doing monitoring and evaluation. It also includes competencies in effectively designing, managing, implementing and using monitoring and evaluation. It includes strengthening a culture of valuing evidence, valuing questioning, and valuing evaluative thinking. This can include the capacity of evaluators, as well as the capacity of evaluation and programme managers, internal staff, and community members.

When we think about evaluation capacity, it's more than an individual or organisation's ability to undertake technical tasks; it also includes a range of areas such as interpersonal communication and group facilitation, as well as the ability to frame evaluations, make sense of them, support their appropriate use.

Kinds of capacity

When we talk about strengthening evaluation capacity, we refer to building three types of capital:

- **Human capital** — knowledge and skills and the ability to apply them in contextually appropriate ways
- **Social capital** — supportive networks of trust and reciprocity to support work
- **Organisational capital** — including infrastructure and organisational culture

Change theories for capacity strengthening

It can also be useful to consider three broad change theories (drawing on Mitchie et al. 2011 meta-theory of behaviour change):

- increasing motivation
- increasing capacity
- increasing opportunity -including an enabling environment for M&E

Evaluation capacity strengthening is not just about training

One-off training is a common approach to evaluation capacity strengthening but it may not be the most appropriate way to address a capacity strengthening need.

Individuals, groups and organisations should think about different types of capacity strengthening activities and support and consider how these can be integrated to best address their specific needs.

We invite you to explore the full range of methods and processes available to you. Let us know if you have any further suggestions.

Methods

Increasing skills and knowledge

A range of methods related to various strategies to increase skills and knowledge - among evaluators, others doing evaluation, and people who oversee monitoring and evaluation systems (for example, program managers).

Competency assessment

- [Self-assessment](#)

Self-assessment is an individual reflection on one's skills, knowledge and attitudes related to evaluation competencies.

This can be a useful tool to identify professional development needs and to plan the composition of evaluation teams.

- [Peer-assessment](#)

Peer assessment can provide additional benefits beyond self-assessment - in particular, the opportunity for peer learning through the review process.

Knowledge, skills, attitudes (KSA) development and ongoing development

- [Coaching](#)

Coaching can involve supporting an individual during training or development in order for them to reach a specific personal or professional goal, or providing expert and practical help to improve and apply specific skills and knowledge.

- [Dialogues](#)

Dialogues refer to a range of learning conversations that go beyond knowledge transfer to include knowledge articulation and translation.

- [Expert advice](#)

Expert advice provides advice in response to specific queries.

It might include a process to clarify and reframe the question that is being asked.

- [Fellowship](#)

A fellowship is an extended position that provides paid employment and support for people who have completed formal coursework in evaluation.

- [Internship](#)

An internship is a paid or unpaid entry-level position that provides work experience and some professional development.

- [Mentoring](#)

Mentoring is a process where people are able to share their professional and personal experiences in order to support their development and growth in all spheres of life.

- [Learning circle](#)

A Learning Circle allows a group of individuals to meet and explore an issue and learn from each other in the process.

- [Peer learning](#)

Peer learning refers to a practitioner-to-practitioner approach in which the transfer of tacit knowledge is particularly important (Andrews and Manning 2016).

- [Reflective practice](#)

Reflective practice involves an individual reflecting on their work allowing them to learn from their own experiences and insights and engage in a practice of continual learning.

- [Self-paced learning](#)

Viewing learning materials, such as previously recorded webinars, at your own pace.

- [Supervised practice in teams](#)

Supervision of practice is an approach often used in social work where it is expected that all practitioners will engage in regular discussions of and reflections on their practice; it is not an approach only intended to support novices.

- [Professional development courses](#)

Professional development courses can be a useful way to develop people's knowledge and skills in conducting and/or managing an evaluation.

Building and sharing knowledge

- [Community of practice](#)

A community of practice allows a group of people with a common interest or concern to share and learn through a series of interactions, thus reflecting the social nature of human learning.

- [Conferences](#)

Attendance at professional conferences to understand how other evaluators frame and discuss their findings is a key component of building evaluation capacity.

- [Evaluation library](#)

In many organisations, a print or digital collection of books, manuals and other documents has been gathered to form an evaluation library that can be jointly accessed.

Decisions to be taken include:

- [Evaluation journals](#)

Evaluation journals play an important role in documenting, developing, and sharing theory and practice. They are an important component in strengthening evaluation capacity.

- [Learning partnerships](#)

Learning partnerships involve structured processes over several years to support learning between a defined number of organisations working on similar programs, usually facilitated by a third party organisation.

- [R&D projects](#)

Evaluation associations can leverage their membership to engage in knowledge construction through research and development.

Other strategies

Reference points for professional practice

These reference points can be used to guide activities aimed at increasing capacity – for example, when developing a training course or a peer learning program – or activities aimed at increasing motivation – for example, supporting a shared professional identity to motivate individuals.

- [Ethical guidelines](#)

Ethical guidelines are designed to guide ethical behaviour and decision-making throughout evaluation practice.

- [Competency frameworks](#)

Competencies are the skills, knowledge, attributes and behaviours needed to fulfil particular roles.

- [Distinct occupational category](#)

A distinct occupational category or role title recognised at a national or organisational level.

- [Expectation of ongoing competency development](#)

An expectation that members of an association or organisation will engage in ongoing competency development.

- [Organisational M&E policy](#)

Organisational monitoring and evaluation policies are the set of rules or principles that an organisation uses to guide its decisions and actions with respect to monitoring and evaluation across programs and departments.

- [Evaluation standards](#)

Evaluation standards identify how the quality of an evaluation will be judged. They can be used when planning an evaluation as well as for meta-evaluation (evaluating the evaluation).

Engagement with professional associations

Professional associations play an active role in supporting capacity development – for example, by offering workshops and encouraging the development of supportive professional relationships. They can also contribute to motivation by providing inspirational exemplars of practice and practitioners.

- [Evaluation societies and associations](#)

Evaluation societies and associations play a significant role in strengthening national M&E systems.

- [Other professional associations](#)

Associations from different but related sectors and fields can be good places to find useful events and training, network connections, and ideas.

Public recognition of good practice

- [Awards](#)

An award is a formal recognition by peers of outstanding individuals or practice.

Some awards are made for cumulative good practice, and others are for exemplars of good practice, such as awards for the best evaluation.

- [Fellows](#)

Fellow is a category of membership of an association or society, often awarded to an individual based on their contributions to evaluation.

Increasing opportunity for professional practice

A range of methods for building a better informed and motivated demand side of evaluation and a more conducive enabling environment. Some relate to educating the public and evaluation managers and users about evaluation and evaluators, and others relate to engaging in wider organisational and public processes with implications for evaluation practice.

Educating the public, evaluation managers and users

- [Public information about evaluation](#)

An important part of evaluation capacity strengthening is providing a clear definition or explanation of evaluation in online and printed materials.

- [Public information about professional practice](#)

As part of its public advocacy role, a professional association can provide potential clients with information about engaging with evaluators effectively.

Strengthening the enabling environment for good evaluation practice

- [Engagement in relevant organisational processes](#)

For evaluation to be truly useful it needs to be embedded in organisational processes.

Particularly relevant issues include strategic changes to how government and non-government organisations plan, manage and implement.

- [Engagement in relevant public processes](#)

For evaluation to be truly useful it needs to engage in public discussions about relevant issues.

Review of practice

Some methods which relate to the task 'Evaluate evaluation' can be used as part of evaluation

capacity strengthening, as they can both improve a specific product and also develop internal skills and knowledge.

- [Expert review](#)

Expert review involves an identified expert providing a review of draft documents at specified stages of a process and/or planned processes.

- [Peer review](#)

Conducting an evaluation using individuals/organizations who are working on similar projects.

[Develop a design for the evaluation](#)

An evaluation design sets out how data will be collected and analysed in terms of the methods used and the research design.

Evaluation designs should suit the particular evaluation in terms of the nature of the evaluation, the nature of what is being evaluated and the availability of resources:

- **The nature of the evaluation:** In particular, answering the [key evaluation questions](#) that have been identified, with methods that will answer different types of questions - [descriptive, causal, and evaluative](#).
- **The nature of what is being evaluated:** Especially in terms of [complicated or complex aspects](#) that need to be addressed.
- **The availability of resources:** Especially [time, money and existing data](#).

Methods

There are different ways to go about the task of designing an evaluation.

When the evaluation design is developed

- [Upfront evaluation design](#)

An upfront evaluation design is done before or near the beginning of the evaluation and then implemented as designed or as revised at the end of the inception period.

- [Iterative evaluation design](#)

An iterative evaluation design begins with an initial design or process from which a more detailed design is created iteratively as the evaluation progresses in response to emerging findings and information needs.

Who develops the evaluation design

- [Commissioner-led evaluation design](#)

The organisation commissioning an evaluation develops an evaluation design as part of setting out the terms of reference for the evaluation.

- [Evaluator-led evaluation design](#)

An evaluation team develops an evaluation design in response to an evaluation brief which sets out the purposes of the evaluation.

- [Community-led evaluation design](#)

A community develops an evaluation design, sometimes with facilitation or technical support.

- [Joint evaluation design](#)

A collaboration is involved in designing the evaluation, which might involve an implementing agency, an evaluation team and/or a community working together.

Combining evaluation methods and approaches

- [Single evaluation approach design](#)

The evaluation design is based on selecting a single existing evaluation model or approach and using it for an evaluation.

- [Bricolage evaluation design](#)

A bricolage evaluation design flexibly combines and adapts various data collection and analysis methods, approaches, and conceptual and value frameworks to suit the specific context of the evaluation.