INSIGHTS INTO EVALUATION CAPACITY BUILDING: MOTIVATIONS, STRATEGIES, OUTCOMES, AND LESSONS LEARNED

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Abstract: Evaluation capacity building (ECB) is a topic of great interest to many organizations as they face increasing demands for accountability and evidence-based practices. While many evaluators are engaged in evaluation capacity building activities and processes with a wide variety of organizations, we still know very little about whose capacity is being built, what strategies are being used, and the overall effectiveness of these efforts. To explore these issues, a research study was conducted with 15 organizations that have been involved in ECB efforts during the last few years. The findings reported in this article are part of a larger study, and represent interviews with 25 evaluators and 13 clients (*n* = 38), who have facilitated and supported an organization's ECB effort. We specifically focus on the participants' motivations for engaging in ECB, the teaching and learning strategies used to facilitate capacity building, their perceived outcomes of this effort, and their lessons learned.

Résumé :   Le renforcement des capacités d'évaluation (RCÉ) est d'un grand intérêt pour beaucoup d'organisations alors qu'elles font face à des demandes croissantes de pratiques basées sur la responsabilité et les données probantes. Bien que de nombreux évaluateurs soient engagés dans des activités et des processus de renforcement des capacités d'évaluation avec un large éventail d'organisations, nous savons toujours très peu sur qui bénéficie du renforcement des capacités, quelles stratégies sont utilisées, et l'efficacité de ces efforts dans leur ensemble. Pour explorer ces questions, une étude a été menée avec 15 organisations qui ont participé aux efforts de RCÉ pendant les dernières années. Les constatations présentées dans cet article font partie d'une étude plus importante et représentent les résultats d'entrevues avec

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25 évaluateurs et 13 clients (n = 38) qui ont animé et soutenu les efforts de RCÉ d'une organisation. Nous nous concentrons en particulier sur les motivations des participants pour s'engager en RCÉ, les stratégies d'apprentissage et de perfectionnement utilisées pour faciliter le renforcement des capacités, les résultats perçus de ces efforts, et les leçons retenues.

INTRODUCTION

"Evaluation capacity is all about getting people in organizations to look at themselves more critically through disciplined processes of systematic inquiry…about helping people ask these questions and then go out and seek answers" (Srik Gopalakrishnan, formerly with the Ball Foundation, Evaluator). This comment, made by one of 38 evaluators and clients we interviewed in our study on evaluation capacity building, reflects the essence of what it means to think evaluatively. Efforts to engage staff and other constituencies in evaluative thinking and practice have been of interest to many evaluators since the mid 1980s. Those using stakeholder, collaborative, and participatory forms of evaluation have often thought that engagement in an evaluation process may lead to participants learning from and about evaluation (referred to as "process use" by Patton, 1997, 2008). A growing number of evaluators, however, are now suggesting that to ensure learning occurs, we must not only be more intentional in the design and implementation of evaluations, but we should also complement participation in an evaluation process with other kinds of learning activities and processes (Calvert & Taylor-Powell, 2007; Harnar & Preskill, 2007; King, 2008; Preskill, 2007, 2008; Preskill, Zuckerman, & Mathews, 2003).

Building the evaluation capacity of non-evaluators has become a topic of great interest to the evaluation community over the last several years. Since 2000, more than 200 presentations on evaluation capacity building (ECB) have been given at the conferences of the American Evaluation Association (AEA) and Canadian Evaluation Society (CES), and there is a growing literature on the topic (Boyle & Preskill, 2007; Duffy, 2007; Preskill & Boyle, 2008; Stockdill, Baizerman, & Compton, 2002; Trevisan, 2002). In addition to studying the topic, many evaluators are finding themselves involved in facilitating evaluation capacity building activities and process. A recent survey of the AEA's membership found that 54% of the responding evaluators said that they engage in evaluation capacity building (AEA, 2008).

While various definitions of evaluation capacity building have been offered, most writers tend to agree that ECB is about building the knowledge, skills, and attitudes of organization members; the sustainability of professional evaluation practice; and providing the resources and motivations to engage in ongoing evaluation work (Gibbs, Napp, Jolly, Westover, & Uhl, 2002; Khan, 1998; Milstein & Cotton, 2000; Stockdill et al., 2002). Seeking to develop a more systematic, multidisciplinary understanding of evaluation capacity building, Preskill and Boyle (2008) offer the following definition:

> Evaluation capacity building involves the design and implementation of teaching and learning strategies to help individuals, groups, and organizations learn about what constitutes effective, useful, and professional evaluation practice. The ultimate goal of evaluation capacity building is sustainable evaluation practice—where members continuously ask questions that matter; collect, analyze, and interpret data; and use evaluation findings for decision-making and action. For evaluation practice to be sustainable, organization members must be provided leadership support, incentives, resources, and opportunities to transfer their learning about evaluation to their everyday work. Sustainable evaluation practice also requires the development of systems, processes, policies, and plans that help embed evaluation work into the way the organization accomplishes its strategic mission and goals. (p. 444)

The fundamental premise underlying this definition is that the organization is committed to internalizing evaluation processes, systems, policies, and procedures that are self-renewing and evolving. It also suggests that the organization must foster a learning culture that values trust, risk-taking, openness, curiosity, inquiry, and experimentation, and champions the ongoing learning of all its members (Preskill & Torres, 1999). As such, an evaluation culture would be reflected by shared and persisting positive beliefs about the value of evaluation to the organization, and enduring commitment to evaluation practice and the use of findings among its members (Huffman, Lawrenz, Thomas, & Clarkson, 2006; McDonald, Rogers, & Kefford, 2003).

Noting that ECB research and practice is in its "infancy" (Stockdill et al., 2002; Cousins, Goh, & Lee, 2004), there is still much for us

to explore. In an effort to contribute to building a knowledge base about evaluation capacity building, we have recently completed a mixed methods research study with 15 organizations throughout the United States. This article reports some of the findings from the interviews we conducted with 38 evaluators and clients who have been engaged in ECB within the last few years. Specifically, we will focus on (a) why these organizations have committed to building the evaluation capacity of their members, (b) which ECB teaching and learning strategies they have used and why, (c) their perceived outcomes of their capacity building efforts, and (d) their lessons learned. We conclude with recommendations for research and practice.

RESEARCH STUDY

The findings reported in this article reflect the following research questions that were part of a larger study on evaluation capacity building:

1. What motivates organizational leaders to support evaluation capacity building efforts?
2. In what ways, with whom, and to what extent are various strategies being used to build evaluation capacity?
3. To what extent, and in what ways, do various evaluation capacity building strategies contribute to individual, group, and organizational learning?
4. What advice do evaluators and clients have for those interested in implementing evaluation capacity building activities and processes?

We were interested in these questions for numerous reasons. From our professional experiences and the literature, it was clear that evaluation capacity building takes a wide variety of shapes and forms given different contexts. Our goal was to get a better sense of how factors such as motivations for engaging in evaluation capacity building, who participates in the efforts, and what they are expected to learn impact which ECB strategies are selected and implemented by organizations and their evaluators. Additionally, knowing that the literature at that time lacked specific steps for implementing ECB activities and processes, we wanted to systematically gather advice and lessons learned about implementing ECB initiatives from individuals who had first-hand experience.

Research Participants

The evaluators and their organizations involved in this study were identified through articles, presentations, papers, and professional contacts. Our criteria for inclusion included

- engagement in building evaluation capacity using one or more of the following strategies: involvement in an evaluation process, training, technical assistance, written materials, communities of practice, appreciative inquiry, internship, mentoring/coaching, use of technology, and/or meetings;
- implementation of evaluation capacity building activities and processes within the last year;
- ability to provide support and opportunity for their members to respond to two surveys (at different times, via paper or Internet, which was part of our larger study);
- willingness to participate in a 45–90 minute phone interview (both the client and the evaluator).

In most cases, the evaluator was contacted first, to discuss the details of the study and to determine if the organization might be a good fit and would be interested in participating. Once it was determined that the organization met the criteria listed above, one of the authors contacted the client to secure his or her support of the study and to discuss the data collection process. The person contacted at the client site, and later interviewed, was the manager or leader who initiated the evaluation capacity building initiative. The evaluators indicated that these individuals are "evaluation champions" at their respective organizations. They did not simply sign off on implementing evaluation learning activities and processes. They were part of the team designing the efforts and participated in the activities along with their staff.

Our sample resulted in a variety of organizations, eight of which are from the education sector. These include nonprofit or faith-based organizations in the K–12 or higher education arenas, whose programs and initiatives aim to improve literacy, support and empower students in low-income areas, and provide high quality educational opportunities to the populations they serve. The other seven sites are from the health and/or human services sectors, and include cancer prevention, county mental health, and state public health service organizations, as well as community-based organizations that promote the health of children, or provide services to the homeless and at-risk

families. Across the 15 sites, those who most often participated in the ECB activities and processes were program staff and service providers. However, numerous program managers, administrators, directors, and board members also participated in many of the ECB efforts.

The majority of these organizations have been involved in capacity building for several years. The range was from 11 months to more than 10 years, with a mean of 5 years. In 9 of the 15 organizations, the majority of evaluation capacity building activities are being facilitated by external evaluators. In the other six organizations, an internal staff member is responsible for implementing various evaluation learning processes.

The ways in which ECB activities are funded vary considerably. In six organizations, the resources for evaluation and capacity building are built into their program grants. In another four, funds comes from an outside source such as a foundation, the Centers for Disease Control and Prevention, the National Science Foundation, or county government. For four other organizations, the resources come from internal funding mechanisms within the organization. Only one site had no budget line item, and no way of incorporating evaluation and capacity building into their operating budget. In this case, all of the ECB activities and processes have been donated by a volunteer professional evaluator.

Data Collection and Analysis

Between August 2007 and April 2008, we conducted 31 semi-structured telephone interviews with 25 evaluators and 13 clients ($n = 38$). These interviews were a follow-up to a survey they had completed a few weeks before. The interviews lasted from 45 to 90 minutes and were digitally recorded with the interviewees' consent. The digital recordings were then uploaded by a transcription service that had signed a confidentiality and non-disclosure form. We also reviewed each organization's ECB planning and implementation documents.

The interview transcripts were analyzed using thematic content analysis procedures, based on themes found in the ECB literature and a model of ECB developed by the authors (Preskill & Boyle, 2008). Each of the authors coded the data independently, following the established coding schema. They then reviewed each others' analyses and discussed what, if any, revisions were necessary. This process resulted in 100% interrater agreement. Participants have granted permission to use the quotes cited in this article.

FINDINGS

Motivations for Engaging in Evaluation Capacity Building

> The ECB literature has identified several reasons an organization might be motivated to build the evaluation capacity of its members. These include (a) a need to meet accountability requirements and to be more effective or competitive in seeking new and/or increased funding (Compton, Baizerman, Preskill, Rieker, & Miner, 2001; Compton, Glover-Kudon, Smith, & Avery, 2002; Corn, Byrom, Knestis, & Thrift, 2006; Newcomer, 2004; Stevenson, Florin, Mills, & Andrade, 2002); (b) a commitment to learning from evaluation that emphasizes program improvement, developing a culture of inquiry, and organizational effectiveness (Gibbs et al., 2002; Solomon & Chowdhury, 2002; Stevenson et al., 2002; Taut, 2007); (c) a desire to communicate more effectively about a program's process, progress, and impact with external audiences (Mackay, 2002; Newcomer, 2004); and (d) the need to diffuse evaluation skills, knowledge, and attitudes throughout an organization or multiple programs and sites (Brandon & Higa, 2004; Donaldson & Gooler, 2003; Forss, Kruse, Taut, & Tenden, 2006; Huffman et al., 2006; Taylor-Powell & Boyd, 2008). The analysis of our interviews illustrated that our interviewees' motivations closely reflected those cited in the literature.

> Of the 15 organizations we studied, 10 stated that, at least in part, their reasons for wanting their staffs to develop some level of evaluation knowledge and skills stemmed from a need to meet their funders' requirements, and to be more effective and competitive in their grant applications. They explained it in the following ways:

> - [We were] starting to get pressures from the funding source, hey, you need to be doing this. You need to be coming up with your outcomes and your accountability if you want to keep getting this funding. (Venango County, Barb Feroz, Client)
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> - It had always been something that we knew we needed to get better at and it was prompted by a request from our largest foundation funder who asked us to consider working collaboratively with other arts education organizations to raise the rigor and professionalism of our evaluations. (Arts Corps, Lisa Fitzhugh, Client)

> In addition, some of those who rely on government funding see it as having little to no choice.

- Some of our funding comes from Maternal-Child Health, which is a federal program that has block grants that go to every state … I think there is no question that the drive on it was accountability to external funders and to our legislators … they really want to know that the money makes a difference. (Office of Family Health, Oregon Public Health Division, Katherine Bradley, Client)

- Whether it is government contracts or the United Way or corporate philanthropy, there is a huge accountability movement. (Neighborhood House, Renae Oswald-Anderson, Client)

We also found that in addition to wanting their staffs to know more about evaluation for very practical reasons such as securing more resources, they also saw the value of evaluation as a means of achieving ongoing program improvement and organizational effectiveness. For example:

- I really see it as building knowledge and skills and organizational support to promote and sustain evaluation as part of an organization's function. I don't think of evaluation just in terms of an evaluation study, or as an evaluation project. I see evaluation more as critical thinking, as a process of inquiry, of asking questions and thinking about what we are doing and why are we doing it, and how can we improve? (University of Wisconsin Extension, Ellen-Taylor Powell, Internal Evaluator)

- What we tried never to say is, "Funders want it this way, we have to do this because of our funding." We would always go back and say, we need to do this because of our commitment to quality. (Neighborhood House, Renae Oswald-Anderson, Client)

Also discussed was an interest in distributing evaluation knowledge and skills throughout the organization or with various programs.

- There was an attempt to look across the office at what we could do to support evaluation across the office regardless of what the individual funding structure was for each program … it wasn't that evaluation wasn't being done, but kind of a consistent picture of it, the value of it, the way it's integrated into decision-making in the office. (Office of Family Health, Oregon Public Health Division, Internal Evaluator)

- I realized very early that I couldn't do evaluations or assessments, or even come up with division-wide assessment plans, because all of these different entities were unique. Although they came under the umbrella of Student Affairs, they had very different charges or missions. So the challenge was, how can I best serve them in terms of assessment needs? I can't do it all, and so I moved to this notion of building the capacity of directors and their staff to plan and conduct their own evaluations, so that they can make informed decisions about their programs and services. I decided that was the best way for me to proceed, being a one-person office. (University of Illinois at Urbana-Champaign, Tom Grayson, Internal Evaluator)

While the majority of the sites started implementing evaluation capacity building activities in response to funding requirements, most have evolved their thinking about evaluation, and they see capacity building as a means for growing and learning, in addition to using the results of evaluation for accountability and communication functions.

Evaluation Capacity Building Strategies

Based on our reading of the ECB literature and personal experiences, we have identified 10 teaching and learning strategies that can help people learn about and conduct evaluations (Preskill & Boyle, 2008). While they may be labelled differently in some organizations, and are often used in overlapping ways, we think it is useful to articulate them in the following way:

1. *Involvement in an evaluation process*: participating in the design and/or implementation of an evaluation
2. *Training*: attending classes/workshops on evaluation
3. *Technical assistance*: receiving help from an internal or external evaluator
4. *Written materials*: using a variety of written documents to learn about evaluation
5. *Communities of practice*: sharing evaluation experiences, practices, information, and readings at self-organized meetings by those who have an interest and/or need to engage in evaluation work
6. *Appreciative inquiry*: using an assets-based, collaborative approach to learning about evaluation that focuses on what has worked well, as well as strengths within the organization

7. *Technology*: using online sources such as websites and/or e-learning programs to learn about evaluation
8. *Internship*: participating in a formal program that provides practical evaluation experience for novice evaluators
9. *Mentoring/coaching*: building a relationship with an evaluation expert who provides individualized technical and professional support
10. *Meetings*: allocating time and space to discuss evaluation activities specifically for the purpose of learning from and about evaluation.

Although the literature suggests that most ECB efforts involve using more than one of these approaches, the strategies most commonly discussed are (1) *involvement in an evaluation process*, (2) *training*, (3) *technical assistance*, and (4) the use of *written materials* (Arnold, 2006; Brandon & Higa, 2004; Corn et al., 2006; Duignan, 2003; Gibbs et al., 2002; Huffman et al., 2006; Mackay, 2002; Miller, Kobayashi, & Noble, 2006; Taylor-Powell & Boyd, 2008).

As we asked our evaluator and client interviewees to describe how they chose their ECB methods, we were struck by how many said that it was a very "organic" process. Not one of the sites we studied began with an overall evaluation capacity building plan. And few had prespecified particular learning objectives, although a few took into account adult learning principles and individual learning styles in the design and implementation of their ECB efforts. The following quotes illustrate the evolving nature of these sites' capacity building initiatives.

- There were not conversations such as "because this is evaluation capacity building, we need to build a learning activity"; that was never said. It was looking at the course of the year, and these are the things that we would like to accomplish. It makes sense for you to do this part and for me to do this part, from a time management and financial planning perspective … It's been more organic. (Arts Corps, Mary Murray, External Evaluator)

- We did propose having them engaged in a logic modeling process; so all the terminology that goes along with understanding a logic model, your inputs and resources, your strategies, and activities, your outputs, impacts. So we knew we were going to use that as sort of a focal point to extending the work they have done, their strategic management efforts into more of an evaluative framework … We've now

been asked to review some existing tools … So I think that's playing out in real time. (Office of Catholic Schools, Allison Crean, External Evaluator)

- We haven't had a strategic evaluation plan … We kind of know what it looks like out there ahead of us, where we want to be, what the situation and needs are, but I don't think that we have ever really well articulated or shared that … Individuals, program areas, districts, and administration make requests or identify needs that we consider relative to our skills, resources, existing work, perceptions of need and priorities. Based on those various kinds of inputs, including from the educators themselves, we work to build capacity. (University of Wisconsin Extension, Ellen Taylor-Powell, Internal Evaluator)

In several cases, the interviewees emphasized that not all staff need the same level of evaluation knowledge and skills (i.e., capacity building), but they had yet to determine a means for matching participants' learning needs with specific kinds of ECB strategies.

As noted earlier, all of the sites used one or more of the 10 evaluation capacity building strategies. As can be seen in Table 1, more than half of the 15 sites have used *training*, *technical assistance, written materials, technology, mentoring* or *coaching,* and *meetings* to help others learn about and engage in evaluation practice. While we have identified technical assistance as a discrete ECB strategy, our interviewees' use of technical assistance takes various shapes and forms, and usually includes some form of technology.

Table 1
Frequency of ECB Strategies

ECB Strategy	Number of Sites Using
Involvement in an evaluation process	15
Training	13
Technical assistance	13
Written materials	13
Technology	12
Mentoring/coaching	10
Meetings (workgroups, task force, committees)	9
Communities of practice	6
Internships	6
Appreciative inquiry	5

Which strategy they used and when seems to be largely serendipitous and opportunistic. The following quotes illustrate their use of these ECB strategies:

- We realized pretty quickly that we needed to do some evaluation technical assistance … We might do an event like a conference call or a webcast. Or, when we have our annual meetings, we would do maybe a workshop on, for example, culturally competent evaluation, or using evaluation findings, or how to use evaluation findings in your annual reports. (Education Development Center, Leslie Goodyear, External Evaluator)

- We do training and I work with the girls to help them generate the questions and create action plans, and then after that the girls work with the local staff to collect data. And I visit them again to help the girls analyze their data, and then they put together a PowerPoint presentation. After that, they do a presentation to their local audiences. (Girls Inc., PeiYao Chen, Internal Evaluator)

- A big piece of what I do is evaluation mentoring. I do a fair amount of TA and peer review—here is what I'm thinking for my evaluation protocol, give me some feedback. So, we do a lot of that kind of peer exchange, but it's very informal. (Office of Family Health, Oregon Public Health Division, Collette Young, Internal Evaluator)

- Every year they have an Evaluation 101, and they have an Evaluation 201, which is on logic models … and then they have this all-day training which is usually different from that … and all of it is done by them. I think they have standardized the materials. They are also very systematic about sending people to evaluation trainings. (Neighborhood House, Jean A. King, External Evaluator)

- Sometimes each of the departments have retreats for their staff at different times of the year, and I'll be invited to come in and either facilitate the entire retreat on occasion or talk for a day. I did this with Campus Recreation and they wanted all their staff to learn about Appreciative Inquiry. (University of Illinois at Urbana-Champaign, Tom Grayson, Internal Evaluator)

- I think that's the beauty when you do the two activities together: training and evaluation. We make sure that what they learn in the training will be related to where they are in their evaluation process. (The Children's Health Council, Luba Botcheva, Internal Evaluator)

These findings appear to echo what others have written in the ECB literature; that is, evaluation capacity building is a multifaceted and evolutionary process. Learning from and about evaluation tends to take place when evaluators and clients perceive a need (sometimes confirmed by a needs assessment) and, in response, consider available resources and the evaluator's expertise and availability.

Evaluation Capacity Building Outcomes

It is important to remember that evaluation capacity building reflects an intention to increase participants' knowledge and skills, and to generate more positive attitudes toward evaluation. Various authors writing about their ECB experiences have described individual-level cognitive, behavioural, and affective outcomes of evaluation capacity building activities and processes, yet our review of 46 ECB articles found only 11 that provided empirical data on these outcomes (Boyle & Preskill, 2007). Authors writing about empirical outcomes, as well as those who discuss outcomes more anecdotally, have found an increased knowledge and understanding of evaluation concepts, terms, and approaches (Arnold, 2006; Kiernan & Alter, 2004; Trevisan, 2002; Valery & Shakir, 2005). Others have identified behavioural outcomes such as (a) increased evaluation skills, (b) the ability to develop logic models and design data collection instruments, (c) the ability to collect valid and reliable data, (d) the ability to analyze data, and (e) the ability to teach others about evaluation (Arnold, 2006; Atkinson, Wilson, & Avula, 2005; Brandon & Higa, 2004; Trevisan, 2002; Valery & Shakir, 2005). And some have reported achieving affective outcomes including (a) an increased commitment to evaluation (Compton et al., 2001; Dabelstein, 2003), (b) stronger positive beliefs about data and evaluation (Atkinson et al., 2005; Brandon & Higa, 2004; Solomon & Chowdhury, 2002), and (c) decreased evaluation anxiety and fear (Kiernan & Alter, 2004; McDonald et al., 2003). In addition to these individual-level outcomes, some authors have noted that ECB has contributed to (a) increased success at attracting external funds (McDonald et al., 2003), (b) enhanced credibility and accountability within partner organizations (Solomon & Chowdhury, 2002), and (c) improved program quality (Tang et al., 2002).

While these articles address different kinds of outcomes, we were unable to locate any literature that offered a comprehensive list of learning objectives or outcomes associated with ECB. Therefore, we developed the list in Table 2, and asked the evaluators and clients to consider these individual-level learning objectives/outcomes during our interview (Preskill & Boyle, 2008).

Table 2
Evaluation Capacity Building Objectives/Outcomes

Knowledge - ECB participants understand:
- That evaluation involves purposeful, planned, and systematic activities.
- Evaluation terms and concepts.
- The relationship between research and evaluation.
- How evaluation processes and findings can contribute to decision-making.
- The strengths and weaknesses of different evaluation approaches.
- The strengths and weaknesses of different data collection methods.
- How to apply basic statistical analyses to quantitative data.
- How to apply basic content and thematic analyses to qualitative data.
- How politics can affect evaluation processes and findings.
- The importance of using culturally appropriate and responsive evaluation approaches and methods.
- What constitutes ethical evaluation practice.
- That various stakeholders may have differing opinions, experiences, and perspectives about an evaluand.
- The relationship between a program's goals, objectives, activities, and expected outcomes.
- What knowledge, skills, and experiences to look for when hiring an evaluator.

Skills (Behaviours) - ECB participants are able to:
- Develop a program logic model.
- Develop key evaluation questions.
- Write an evaluation plan.
- Design data collection instruments.
- Choose appropriate and relevant data collection methods.
- Collect credible and reliable data.
- Analyze quantitative data.
- Analyze qualitative data.
- Interpret results and draw conclusions.
- Develop an evaluation budget.
- Communicate and report evaluation processes and findings using a variety of strategies.
- Use the *Program Evaluation Standards* and/or the *AEA Guiding Principles for Evaluators.*
- Teach others about evaluation.
- Develop an evaluation strategic plan.
- Manage the evaluation process.

Affective - ECB participants believe that:
- Evaluation yields useful information.
- Evaluation can be a positive experience.
- Evaluation should be part of a program's design process.
- Evaluation contributes to a program's success.
- Evaluation adds value to the organization.
- Evaluation is an important part of their work.
- Evaluation is worth the time and money.

Although few of our interviewees designed their evaluation capacity building activities with predetermined objectives, they do believe that their ECB efforts have increased their participants' evaluation knowledge and skills, as well as helping them think more positively about evaluation. For example, the majority of evaluators and clients believe that participants understand (a) how to develop logic models, (b) basic evaluation terms and concepts, (c) the importance of using findings for decision-making, (d) various data collection methods, and (e) the overall evaluation process. Those who have provided training on cultural competency in evaluation and/or ethics also think their participants understand what it means to conduct culturally competent evaluations and to engage in ethical evaluation practice.

In addition to having knowledge about evaluation concepts and practices, all of the interviewees were able to identify specific skills ECB participants have developed. For example, most thought that their staff now ask better and more frequent questions about their programs and use evaluation findings more often. Moreover, for some, their participants are better able to design data collection instruments and communicate and report more effectively with their stakeholders. A change in attitudes was also cited as a major outcome of their evaluation capacity building efforts. Nearly all of the interviewees mentioned that participants appear more willing to engage in evaluation-related work and seem to believe that evaluation contributes to the organization's success. A few also mentioned a decreased fear of evaluation and an increased demand for evaluation, again illustrating a more positive attitude toward evaluation practice. The following quotes illustrate some of the knowledge, skills, and attitudinal outcomes:

- I think that they are more competent at asking the right questions on surveys … and now they're very intentional about program goals. They ask, what questions we can ask about each of those goals … they get the value of piloting and revising and revising, and really making sure that the survey is [good] … I think that they are getting better at evaluation use. (Arts Corps, Mary Murray, External Evaluator)

- I think the members of the partnership team have developed their own capacity around being very thoughtful and understanding of the significance of quality questions. That the depth and the meaningfulness of the question that you ask often helps determine what path you will take. (The Ball Foundation, Janice Crawford, External Evaluator)

- The underlying concept is that this is a strength-based process … When we first started, there was a little bit of that hesitation. I think there was a lot of ambivalence … fear about evaluation … But I think that kind of disappeared over time as the tone was set by everyone … and everybody concentrated on "this is a process to help the staff do their job, to help improve where the organization's going, and it's not meant as punitive in any way, shape, or form." (Decatur Cooperative Ministry, Maureen Wilce, External Evaluator)

- I think my knowledge and skills have improved … developing a logic model, knowing what outcomes I want to measure … laying out that roadmap kind of helped to know what I needed to do next. (Emory Prevention Research Center & the YBH Project, Pamela Green-Jackson, Client)

In addition to affecting individuals' knowledge, skills, and attitudes, the interviewees also described the impact evaluation capacity building has had on their organizations:

- We had a retreat with our staff to work toward a strategic plan, and as we began, the conversation spun around, redirecting them to working with the logic models, so that we're actually doing that … they are putting in place a model they can use for the purpose of doing evaluation. (32nd Ave. Jubilee, Christopher Johnson, Client)

- The Organizational and Program Assessment Group creates continuity … the Organizational and Program Assessment Group always has a Board member on it and an established set of volunteers. I think they would carry the evaluation forward. There is a desire to keep going, so I think there is some commitment in the organization that is well beyond me." (Decatur Cooperative Ministry, Beth Vann, Client)

- It was just their own sort of realization or ah ha around what existed in their own district. So, there was a whole thing about, "Wow, I just didn't know how much that we are doing or how much good stuff existed," and it was an affirmation. I think that when they got that affirmation, they realized that the process that we put in place enabled them to come to that. So that made them appreciate what appreciative inquiry could do … you get at the assets or you find out what's positive and what's working. Then you really latch onto the

> notion of finding what's positive and what's working, so that we can build on that. (The Ball Foundation, Rex Babiera, External Evaluator)

While most of the interviewees could cite individual- and organizational-level outcomes of their ECB efforts based on their personal experiences, few of the sites have developed formal evaluation processes that track the impact of their capacity building efforts. At the same time, several mentioned that they conduct evaluations of annual meetings and training workshops, and have plans for establishing more comprehensive, systematic evaluations in the near future.

Lessons Learned

The evaluators and clients we interviewed were not novices in this work; most have been engaged in evaluation capacity building for a number of years. In an effort to benefit from their wisdom and experiences, we asked them what advice they would give to other evaluators and clients who wanted to build the evaluation capacity of their members and constituencies. In other words, we wanted to know their lessons learned as they reflected back on their experiences. Their comments and recommendations clustered into the following 10 themes and, in general, support what others have noted in the literature (Baizerman, Compton, & Stockdill, 2002; Chen, 2001; Compton et al., 2002; Corn et al., 2006; Dabelstein, 2003; Donaldson & Gooler, 2003; Kiernan & Alter, 2004; King, 2002; Mackay, 2002; Milstein, Chapel, Wetterhall, & Cotton, 2002).

Create interest, motivation, and buy-in. Nearly half of our interviewees emphasized the importance of demonstrating the value of evaluation early on in the ECB effort. This involves obtaining the support of the organization's leaders and ensuring that they and others create a climate supportive of the evaluation capacity building activities and processes. While some recommended providing incentives to encourage participation, others suggested that it was important to show, in tangible ways, how and why evaluation would benefit the participants' programs (as well as themselves) and their organization overall.

Understand the organization. Many of the interviewees stressed how important it is that ECB facilitators understand the organization's prior experiences with evaluation, the participants' level of ECB readiness, as well as the organization's political and cultural context.

In fact, some of the evaluators conducted in-depth organizational and evaluation capacity assessments before beginning the ECB efforts, and pointed out that organizations and their staff members start evaluation capacity building initiatives at very different levels. They suggested that it is critical to be aware of and build on the existing internal assets and resources of the organization and "meet them where they're at."

Plan for and design the ECB effort. While those interviewed for this study typically described their ECB efforts as evolving and organic, many advised other ECB facilitators to design their capacity building activities in ways that engage participants, are appropriate for their level of need, cover key concepts early on, are based on goals, and are practical. Some emphasized the importance of not prolonging the logic model development process, as they have seen many efforts get bogged down in the details, resulting in participants' loss of interest in and decreased motivation for engaging in evaluation work.

View evaluation capacity building as a learning process. It was clear that our interviewees understood that ECB is fundamentally a learning process, and believe it is important for others to understand this as well. This advice highlights the need for evaluators and clients to be cognizant of adult learning principles, effective instructional design practices, and the need to be flexible, adaptable, and patient as the ECB effort unfolds. As one person explained, "You can't drive it; you can't force it down people's throats."

Secure sufficient resources for evaluation capacity building and evaluation. Several evaluators and clients talked about the need to make sure that funds are available to support evaluation and any related capacity building activities. Whether it is to hire external evaluators, to purchase database software, to send staff to evaluation workshops, or to hire an internal evaluator, it is critical that funds be available. This might involve building ECB efforts into new grants, securing funding from other sources, or establishing a line item within the organization's budget.

Build strong relationships and develop rapport. In many ways, learning from and about evaluation is an intensely personal experience. Someone (usually an expert) is typically teaching someone else (a novice) about a new concept or practice. This requires change, admitting a lack of knowledge or experience, and trusting that the change will be worth the effort and cost. As such, our interviewees explained that evaluators must demonstrate respect for those with whom they

are working, and that they must listen carefully, ask questions, and be open-minded.

Understand that evaluation takes time. Like any organizational change effort, changing people's knowledge, skills, and attitudes is a complex process that requires time and patience. Unfortunately, in the fast-paced world in which we live, new ideas or initiatives are rarely given the time they need to fulfill their promise. As such, several interviewees emphasized the need for time when engaging in ECB. Repeatedly they said that it takes much more time than anyone expected, and that tolerance and perseverance is vitally important for sustainable evaluation practice.

Use participatory approaches. Several of the interviewees spoke about the importance of engaging the whole system—as many people as possible—in the evaluation capacity building initiative. They felt that if staff were not involved every step of the way, and if staff did not see themselves as partners in this endeavour, then whatever gains might be made would likely be transitory.

Use an assets- and strengths-based approach. The five sites that described using an assets-based approach to their ECB work believe that this strategy was instrumental in changing people's perceptions about the value of evaluation and how it can serve the organization's mission. They suggested that by having participants focus first on their programs' strengths, participants were able to see how inquiry and data could help them address issues and challenges in a very different way. As Bob Hill from the Ball Foundation explained, "Our team supports transformational change rather than reform when working alongside our school district partner. The emergence required in transformation is only possible in a new story of abundance, which requires that the work be built on assets rather than deficits."

Identify evaluation champions. While we could have subsumed this finding in the first theme of creating interest, motivation, and buy-in, we thought it was important to call this out on its own. Several of the interviewees talked about the importance of identifying evaluation champions within the system or organization. These champions may not be the titled leaders; instead, they might be members who have an interest in and energy for evaluation. Enlisting these people in motivating others to engage in evaluations, encouraging them to ask the critical questions, helping them implement and act on the evaluation findings, and providing support and resources for evalu-

ation work are all ways in which internal champions can serve the evaluation capacity building effort.

The following quotes reflect several of the core findings just discussed:

- Go slow. Have a practical orientation rather than a theoretical orientation. Respect what people are doing. Don't make too many assumptions about where you think they are at, in terms of understanding and using evaluative information … I have learned to be very careful with the use of language and jargon and terminology … you have to use their language and try to understand where they are going. (University of Illinois at Urbana-Champaign, Tom Grayson, Internal Evaluator)

- Knowing how they've done it in the past … who's got the most knowledge and experience with it. How it's been used in the past and then how it's been shared … a lot of it has to do with question-asking. It's a lot of what evaluation is all about, isn't it? (Neighborhood House, Barbara Merrill, Internal Evaluator)

- I would tell them to be more explicit in teaching the concepts up front … "This is what we're going to do now," and I think some people catch on and probably can replicate it from just watching that experience. But knowing now what I do about how you train people to do evaluation, I would have incorporated more of that. I would have given out some more materials to explain the fundamentals of evaluation. I would have been more explicit on teaching than just learning by doing. (Decatur Cooperative Ministries, Maureen Wilce, External Evaluator)

- I think we really need to see evaluation capacity building as a learning process; that we are learning together in that process and be really flexible, and always listen to what the people's needs are instead of imposing your own agenda. (Girls Inc., PeiYao Chen, Internal Evaluator)

- They need to dedicate money to making it so—whether it's hiring a consultant to help them or an outside evaluator or making sure that they are paying their staff to make it happen. (Arts Corps, Tina LaPadula, Client)

- It's all about relationships; it's all about the amount of time you can spend building trust, getting people to understand that you're not there to be the expert and tell them they're doing things wrong, or to get them to do things in one way, but to really help find out what their issues and questions are. (Education Development Center, Joyce Malyn-Smith, Principal Investigator responsible for evaluation capacity building)

- This has really gone so much further than I expected it to. That's because we have ended up having some terrific champions that have really been able to take this and run with it. It was really staff driven from the beginning. (Office of Family Health, Oregon Public Health Division, Katherine Bradley, Client)

In the next section, we synthesize our primary insights from these interviews and offer a set of recommendations for those interested in planning and implementing evaluation capacity building activities and processes.

DISCUSSION

In this article, we have focused on the findings from interviews with 25 evaluators and 13 clients who have been committed to building evaluation capacity in 15 different organizations and systems over the last few years. While many evaluation researchers have written about ECB, few appear to have conducted empirical studies on the process or outcomes of this work. We believe that the findings reported in this article contribute to our expanding knowledge and practice about evaluation capacity building.

Implications for Research

It is interesting to note that, in spite of the fact that trained evaluators typically facilitate ECB efforts, so few have instituted formal evaluations of their work. Given the relative newness of this line of practice and research, it perhaps is no surprise that our interviewees raised a lot of questions that, to our knowledge, have not been addressed in the ECB literature. One issue that stands out for us is that evaluation capacity building activities and processes tend to evolve and are not planned in any systematic or strategic way. While

such an organic process certainly has its merits (e.g., just-in-time learning), there may be costs associated with this laissez-faire approach to learning. For example, when we do not specify objectives, when we have not clearly identified whose capacity needs to be built, why, and to what depth, when we choose an approach because it is what we know or feel comfortable doing, there are likely unwanted consequences. While the field lacks empirical data on any long-term effects of ECB, we cannot say for sure what these consequences might be. However, we would speculate that participants' new evaluation knowledge and skills may not be transferable or sustainable over time. Issues of design and implementation matter; as evaluators know all too well, fidelity of implementation is a serious issue in assessing program outcomes. Although we were able to ascertain some level of understanding about how the organizations' ECB activities were designed and implemented, we were not observers of their processes. Consequently, our understanding is limited to what they were able to share with us. Studies of the finer details of designing and implementing various teaching and learning strategies would contribute to the field's understanding of the nuances and necessary conditions for developing and sustaining evaluative thinking and practice.

Another issue that deserves more attention is the influence of the organization's leadership, culture, systems, structures, and communication channels. These elements of an organization's infrastructure can profoundly influence the effectiveness of any evaluation capacity building effort. While the interviewees often mentioned the importance of internal champions, leadership support, and creating a culture of inquiry, we need to study both the readiness of an organization to engage in evaluation capacity building and how these different organizational elements affect when, how, where, and why people learn from and about evaluation.

Future ECB evaluations and research studies should also examine short- and long-term outcomes related to specific strategies, especially those that have been implemented less often in practice and have received only modest attention in the ECB literature. For example, there is a substantiated need for further research on how to use Appreciative Inquiry and other assets or strength-based processes in building evaluation capacity. While some of the sites used Appreciative Inquiry and emphasized the effectiveness of using an assets-based approach for learning from and about evaluation, much more can be done to develop an in-depth understanding about how to design and implement an Appreciative Inquiry for this purpose,

as well as what types of outcomes should be expected. As mentioned earlier, *involvement in the evaluation process*, *training*, *technical assistance*, and *written materials* appear to be the most commonly used ECB strategies. Additional studies that focus on the relative strengths and weaknesses of the 10 strategies may help ECB practitioners determine when, where, and with whom to use certain strategies, given the desired ECB goals and objectives.

Implications for Practice

> Learning is not attained by chance; it must be sought for with ardor and attended to with diligence. (Abigail Adams, 1780)

This quote captures an essential finding from our interviews and the extant literature. That is, evaluation capacity building activities and processes should be conceptualized, designed, and implemented in ways that maximize participants' learning. While all of the sites we studied are doing important, relevant, and, in many ways, effective capacity building work, we are concerned that they and others are not being strategic and systematic in the ways in which they are approaching learning from and about evaluation practice. This is especially critical when resources are limited and opportunities for ECB are few. We would like to encourage ECB facilitators to work with their clients in helping them develop a systemic view and systematic approach to evaluation capacity building. This includes considering the organization's context and readiness for ECB, articulating specific goals and objectives to be achieved, determining whose capacity is to be developed and why, choosing which of the 10 strategies will be most effective, and ensuring that participants' transfer of learning will be supported. If our goal is sustainable evaluation practice, then we must bring together all aspects of the system to support this effort. As Fullan (2008) writes,

> Capacity building concerns competencies, resources, and motivation. Individuals and groups are high in capacity if they possess and continue to develop knowledge and skills, if they attract and use resources (time, ideas, expertise, money) wisely, and if they are committed to putting in the energy to get important things done *collectively* and *continuously* (ever learning). This is a tall order in complex systems, but it is exactly the order required. (p. 57, italics in the original)

As evaluators, we should not leave learning from and about evaluations to chance. Again, quoting Fullan, "you don't make a pig fatter just by weighing it or by trying to scare it into eating" (2008, p. 63). In other words, evaluators must seek out learning with "ardor" and "diligence," and make learning a primary goal of our work. If we truly believe that evaluation has the ability to improve lives and organizations, and ameliorate some of today's most serious problems, then it is our duty to continue to develop, empirically test, and apply frameworks, theories, indicators, and strategies to improve our understanding and practice of evaluation capacity building.

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