

Threshold Concepts in the Practice of Evaluation Capacity Building

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Research Problem

- Limited education & PD to prepare for ECB practice
- No established curriculum to ensure quality & consistency

So...

- How do evaluators figure out how to do ECB?
- What do they learn that is most consequential for their ECB practice?

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Research Questions

1. What professional learning strategies do program evaluators use to develop their capability to build the evaluation capacity of non-evaluators?
2. What conceptions do evaluators hold about evaluation capacity building and their roles as evaluation capacity building practitioners?
3. What threshold concepts are revealed in the challenges and epiphanies evaluators experience while learning how to build the capacity of non-evaluators to do and use evaluation?

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Practitioner Assumptions

Assumption 1:

ECB requires more than technical skills in evaluation. A competent evaluator is not necessarily equally competent as an ECB practitioner (Baizerman et al., 2002; Stockdill et al., 2002).

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Practitioner Assumptions

Assumption 2:

ECB is inherently an educative act that requires knowledge and skills for teaching or training (King, 2020; LaVelle & Donaldson, 2021).

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Practitioner Assumptions

Assumption 3:

Proactive facilitation of individual and collective learning is a defining feature of ECB, setting it apart from routine evaluation practice (e.g., Preskill & Boyle, 2008).

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Quantitative-Qualitative Sequential Exploratory Design

Phase I - Quantitative

- Online survey of ECBPs
- RQ1 - Map landscape of professional learning strategies used
- RQ3 - Preview challenges of learning how to do ECB
- Descriptive & thematic analysis

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Quantitative-Qualitative Sequential Exploratory Design

Phase 2 – Qualitative Data

- One-on-one interviews via zoom
- RQ2 - Identify different ideas about ECB purpose & roles
- RQ3 - Identify challenges of learning to do ECB & pivotal insights that transform practice (i.e., threshold concepts)
- Phenomenographic analysis to capture and pool a range of distinct ideas

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RQ1. Learning Strategies

Findings:

- Most used informal (88%) and non-formal (74%) vs. formal strategies (39%)
- Informal learning takes many forms
- Common content - ECB & stakeholder engagement
- Unique to formal learning - Adult learning & org learning

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RQ1. Learning Strategies

Interpretation:

- Illustrates the piecemeal nature of preparation for ECB practice
- Little preparation related to two defining features of ECB – adult learning & organizational learning

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RQ2. Conceptions of ECB

Findings – Purpose of ECB:

- Support the evaluator
- Encourage use of findings
- Foster development & application of skills
- Cultivate conditions for sustained practice

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RQ2. Conceptions of ECB

Interpretation - Purpose of ECB:

- In practice, ECB addresses individual capacity and organizational capacity
- All conceptions of ECB purpose are consistent with ECB as a continuum of practice

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RQ2. Conceptions of ECB

Findings – ECBP roles:

- Subject matter expert
- Resource developer
- Collaborator
- Facilitator, coach, mentor
- Educator, teacher, trainer

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RQ2. Conceptions of ECB

Interpretation – ECBP roles:

- ECBPs (in this sample) embrace educative roles
- **However**, if relatively few complete education or professional development related to educating, how prepared are they for this role?

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RQ3. Challenges

Challenges to learning

- Obstacles to learning about ECB

Challenging to learn

- Challenging domains of ECB practice

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RQ3. Obstacles to Learning

Findings:

- Shortage of practical resources
- Limited access to ECB-relevant course & professional development
- Insufficient time to learn from practical experience

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RQ3.Challenging Domains of Practice

Findings:

- Securing commitment to ECB
- Tailoring interventions to specific contexts
- Adapting to existing evaluation capacity
- Communicating with non-evaluators
- Facilitating meaningful learning

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RQ3.Threshold Concepts

- Associated with one of the challenging domains of ECB practice
- Evidence of pivotal insight that transformed understanding of or approach to ECB practice

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Threshold Concept 1

Securing commitment to ECB begins with building positive working relationships at multiple levels of an organization.

- Active listening
- Building trust
- Problem-solving around pain points

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Threshold Concept 2

Tailoring ECB interventions to specific contexts requires understanding the host organization as a system of influences that shape what is realistic and feasible to accomplish.

- Learning culture
- Power dynamics
- Data infrastructure

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Threshold Concept 3

Adapting to non-evaluators' existing capacity for evaluation establishes realistic expectations and motivates participation and sustained engagement in ECB.

- Evaluation can be difficult for non-evaluators to grasp
- Assess what they are ready for

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Threshold Concept 4

Communicating with non-evaluators involves using accessible language and visual tools to encourage engagement and foster meaningful learning.

- Avoid technical language/evaluation jargon
- Data visualization, dashboarding
- Logic models, theory of change pathway models

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Threshold Concept 5

Facilitating meaningful learning calls for educative processes that extend beyond technical training to cultivate evaluative thinking and support the routine use of evaluation for learning and decision-making.

- Not a "sage on the stage"
- Evaluation capacity is not a widget

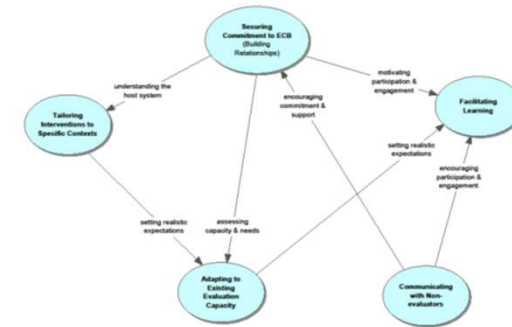
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Applications

- Developing a process theory of ECB
- Mapping competencies to domains of ECB practice
- Organizing curriculum:
 - ✓ ECB overview course
 - ✓ Professional development modules
 - ✓ Self-study program

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Integration of Concepts



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Skill-based Competency Domains

Castleman (2021), Castleman & Fierro (2024):

- Contextual
- Interpersonal
- Educative
- Technical

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Concept-based Competency Domains

Securing commitment to ECB

- Building trust and motivating others
- Knowledge of participatory evaluation practices
- Building positive working relationships at multiple levels of an organization

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Concept-based Competency Domains

Tailoring intervention to specific contexts

- Knowledge of organizational change mechanisms
- Applying a systems thinking lens to building evaluation capacity
- Applying knowledge of organizational development principles to build evaluation capacity
- Assessing readiness of system components to support ECB (e.g., leadership, learning culture, knowledge management resources)

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Concept-based Competency Domains

Adapting to Existing Evaluation Capacity

- Conducting an initial assessment of participants' existing capacity to inform ECB design
- Designing the ECB intervention, including documenting the approach

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Concept-based Competency Domains

Communicating with non-evaluators

- Using non-technical language as appropriate in written and verbal communications
- Applying data visualization skills to present and explain complex data
- Using causal mapping tools to co-construct and document shared understanding

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Concept-based Competency Domains

Facilitating meaningful learning

- Knowledge of adult learning, instructional design, and facilitation techniques
- Developing tools and templates for ongoing use in programs and organizations
- Adopting a variety of educative roles as needed, including teacher, facilitator, coach, mentor
- Evaluating the ECB intervention or approach

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Key Limitations

- Small survey sample
- Sampling frame did not include Internal Evaluation TIG
- Threshold concepts limited to individual capacity building
- Does not differentiate learning from internal vs. external or direct vs. indirect ECB experiences

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Future Research

- Testing foundational threshold concepts and the connections between them
- Exploring the next level of threshold concepts in each challenging domain of ECB practice
- Identifying foundational threshold concepts in organizational capacity building

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