

Rethinking Evaluation Competencies for the Transformational Imperative

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Background: Evaluation must adapt to escalating social, environmental, and technological disruption and instability that characterize the global polycrisis. Existing evaluation competency frameworks remain valuable but can be complemented with orientations that better support evaluation's engagement with transformational, systemic change.

Purpose: To articulate competencies and enabling conditions that better equip evaluation to engage with the transformational imperative—the urgent need for systemic, just, and regenerative change in response to the global polycrisis—by offering an adaptable framing that fosters openness, reflexivity, and values-driven practice, dialogue and learning across the evaluation ecosystem.

Setting: The global evaluation ecosystem, including evaluators, commissioners, managers, users, and educators.

Intervention: Not applicable.

Research Design: Conceptually informed synthesis combining foresight analysis, targeted literature review, and practitioner experience.

Data Collection and Analysis: Three Horizons foresight inputs, selective literature synthesis, and iterative thematic analysis supported by AI-assisted clustering.

Findings: The article identifies a competency gap relative to the demands of the transformational imperative and proposes eleven competencies that bridge conventional evaluation practice and transformation-focused aspirations. Scenario-based illustrations demonstrate application across roles. The 3Cs framework—competencies, capacities, and capabilities—emphasizes that meaningful application depends on institutional and systemic conditions that enable rather than constrain practice.

Keywords: *evaluation competencies; transformational change; polycrisis; systems thinking; evaluation capacity development; institutional capability; values-driven evaluation; evaluation ecosystem.*

The new classes of expert professionals have been trained to focus on narrow, specialized knowledge independent of social ideas or conceptions of the common good.... They have no concept, thanks to the education they have received, of how to replace a failed system with a new one. They are petty, timid, and uncreative bureaucrats superbly trained to carry out systems management. They only see piecemeal solutions that will satisfy the corporate culture.... The human consequence never figures into their balance sheets. The democratic system, they believe, is a secondary product of the free market—which they slavishly serve. (Hedges, 2009, pp. 110–111)

The above critique of narrow, technocratic expertise underscores challenges facing evaluation today: without reoriented competencies, evaluators risk becoming technicians of business-as-usual rather than contributors to transformational change in the face of escalating global crises.

The evaluation community has made notable progress in defining professional competencies (e.g., AEA, 2018; CES, 2018; UNEG, 2016; GEI, 2025). Yet many existing frameworks, though valuable, are not meeting the moment (JMDE, 2023). They risk reinforcing business-as-usual approaches if applied without deeper reflection on the values and systems within which evaluation occurs (Leeuw & Pleger, 2023; Schwandt, 2015a, b). Some focus primarily on individual evaluators rather than the broader constellation of actors who commission, manage, use, and educate others in evaluation, thereby limiting evaluation's systemic reach and potential to contribute to meaningful change. Others emphasize technical proficiency over ethical, relational, and systemic awareness, underscoring the need for a broader, more forward-looking orientation. Competencies can therefore become more futures-oriented, equipping evaluation to better anticipate and engage with rapidly evolving challenges and navigate the profound disruptions of our time.

Evaluation thus stands at a crossroads. As global systems face an intensifying polycrisis, marked by climate instability, deepening inequality, epistemic injustice, and other interlinked crises, evaluative practice must evolve from a primarily technical craft toward a form of public learning and stewardship for the common good. The COVID-19 crisis has already pushed the field to reconsider its relevance and its

competencies (JMDE, 2023). Schwandt's (2019) call for "post-normal evaluation" is especially apt, underscoring that business-as-usual approaches are inadequate in the face of complexity, uncertainty, and contradiction, and that evaluation's resilience depends not only on methodological innovation but on an ethical responsibility to the common good.

Meeting this challenge requires a reorientation of competencies away from mechanistic expertise and toward integrated competencies that are systemic, adaptive, and values-driven. As the *Blue Marble Evaluation* principle of "skin in the game" reminds us, evaluation actors themselves have a stake in the transformations needed for a just and regenerative future (Patton, 2019a).

In this article, the **transformational imperative** refers to the urgent, collective need for systemic change to address the interconnected global challenges of the polycrisis. It is inseparable from the idea of **transformational change**, understood here as a deep and fundamental change in a system's form, function, or processes (CIF, 2021). Together, these concepts underscore that responding to today's global challenges requires reimagining not only what evaluation does, but also how it thinks, learns, and acts within complex systems.

Values are the normative anchors that give direction and purpose to evaluation. They express what evaluation stands for and why it matters.

Principles translate these values into guiding orientations for evaluative judgment and behavior. **Competencies**, in turn, represent their applied expression: the combinations of knowledge, skills, and attitudes through which evaluative values and principles are enacted in practice.

The competency framework advanced in this article is therefore grounded in values that respond to the transformational imperative and the realities of the global polycrisis—values such as equity, inclusivity, respect for diverse knowledges, sustainability, and commitment to the common good, in pursuit of just and regenerative futures for both people and planet. These reflect and extend principles articulated across many evaluation associations, societies, and initiatives worldwide (e.g., AEA, 2018; IDEAS, 2019; GEI, 2025), positioning evaluation not merely as a technical function but as an ethical and civic responsibility.

This article is not a general discussion of evaluator competencies or evaluation capacity development (ECD), understood here as the

intentional process of strengthening individuals, organizations, and systems to conduct and use quality evaluation. Rather, it calls for a shift in evaluation practice—across the entire ecosystem of evaluators, commissioners, users, and educators—toward supporting transformational change for the common good. Competencies are the means through which values are enacted, but their potential depends on whether institutions and systems foster the **capacities** and **capabilities** needed to activate and sustain them. This dual emphasis, on reorienting competencies and embedding them in enabling ecosystems, underpins the central premise of the article.

The sections that follow elaborate this premise. We first outline our methodological approach, which combined foresight, literature review, and collaborative analysis. We then identify the competency gap revealed through this process, showing how current practice falls short of the transformational imperative. Following that, we present the proposed competency framework and the values guiding it. We ground the framework in practice by offering illustrative, scenario-based examples of how the competencies can manifest across different evaluation roles, and then we extend the analysis to the systemic capacities and capabilities that support the competencies—the **3Cs framework**. We conclude with reflections on implications for evaluation capacity development and the future of the field.

Approach

This article is grounded in a participatory, systems-oriented inquiry into the competencies and enabling conditions needed for evaluation to contribute meaningfully to the transformational imperative. It offers a conceptually informed synthesis—not an empirical study—drawing on professional experience, collaborative foresight, and targeted literature to explore which competencies, and which capacities and capabilities, are most relevant for transformational change. Because such competencies are dynamic and deeply contextual, we adopted a pragmatic and pluralistic stance, emphasizing reflexivity and inclusion in interpreting insights from these complementary sources.

Rather than seeking linear causality or universal agreement, the inquiry embraced complexity and diversity of perspective to illuminate not only which competencies appear desirable in theory but also which seem most feasible and urgent in practice across varied roles, systems, and geographies. Central to this inquiry was the intentional inclusion of a diverse author team, reflecting a range of lived experiences and professional perspectives across geography, generation, gender, and cultural orientation. This diversity was essential to ensure that our synthesis drew upon multiple ways of knowing, situated insights, and grounded judgment shaped by varied contexts of evaluative practice.

Our approach built upon work by the International Evaluation Academy (IEAc) and its *Transforming Evaluation Initiative*, which applied a Three Horizons foresight exercise (Ofir et al., this issue).¹ Three Horizons explores present needs and future potential through three temporal frames: Horizon 1 (current systems), Horizon 2 (transition), and Horizon 3 (emergent futures). It was particularly well suited for examining long-term transformation trajectories, bridging perspectives across time horizons to identify the competencies and conditions needed to strengthen evaluation's potential to respond to the transformational imperative.

The process drew on over 1,300 individual survey responses from 39 respondents, included 61 persons directly involved in shaping the results—about half from the Global South—and incorporated additional input from more than 300 participants worldwide through eight webinars and conference sessions. Artificial intelligence (AI) tools were also used selectively to assist in the Three Horizons exercise with data organization, clustering of competency concepts, and iterative thematic synthesis. Further methodological detail on the AI-assisted analysis, interviewee demographics, and participant sampling for the Three Horizons exercise is provided in Ofir and colleagues' companion article in this special issue.

We complemented the foresight process with a **targeted literature synthesis**, drawing on existing evaluator competency frameworks, recent scholarship on evaluation capacity development, transformation-oriented evaluation, and relevant cross-disciplinary sources on leadership, systems thinking, and

¹ <https://ieac.global/catalysing-transformational-change-ieac-showcases-the-three-horizons-initiative-at-the-samea-conference/>

learning. The specific sources informing this synthesis are cited in the sections that follow.

Generative AI tools such as ChatGPT and Gemini were also used individually by the authors to support the synthesis and editorial process, specifically to enhance textual coherence and readability while preserving the authors' original analytical intent.

While this approach sought to balance breadth, depth, and inclusivity, several limitations of perspective are acknowledged. Engagement was bounded by time and resource constraints, and while the foresight process involved a purposeful sample of evaluators, perspectives from some communities—notably Indigenous evaluators—were initially underrepresented, though that underrepresentation was later partially addressed through follow-up dialogues. The literature synthesis was selective rather than exhaustive and reflects the positionalities and transdisciplinary orientations of the author team. Finally, the systems mapping and AI-assisted synthesis entailed interpretive judgment; the findings should thus be understood as a curated synthesis for dialogue and learning, rather than a definitive or consensus model.

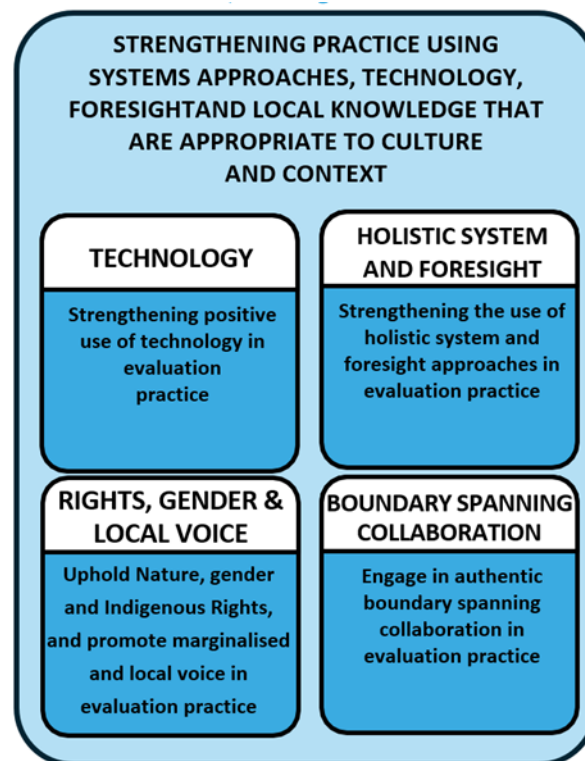
The Competency Gap

The IEAc's Three Horizons exercise produced rich material for reflection. Notably, it confirmed

that the current state of evaluation practice (Horizon 1) is not fit for purpose and requires systemic change at a global level if evaluation is to contribute to just and regenerative transformation—rather than perpetuating the status quo that sustains and exacerbates the polycrisis. This analysis underscored that if evaluation is to support the transformational imperative, it must undergo transformation itself, recognizing that evaluation is not external to the systems in need of change but is instead an integral part of those systems and that change.

This transformation entails rethinking not only how evaluations are conducted, but also who participates, what knowledge is valued, and what purposes evaluation serves. With regard to evaluation competencies, Horizon 2 of the Three Horizons exercise identified specific areas for development to help achieve the aspirational future outlined in Horizon 3. These include competencies related to complexity and systems thinking, futures thinking and foresight, understanding and ethical use of AI and data science technology, greater integration of Indigenous and local voices, and authentic boundary-spanning collaboration. The Horizon 2 road map also highlights the importance of engaging new groups of evaluators and raising awareness of ongoing transformation initiatives. These focal areas, summarized in Figure 1, inform the competency areas elaborated later in this article.

Figure 1. Excerpt: Horizon 2 Competency Development Areas



From Ofir et al., this issue

A growing body of scholarship corroborates this article's central premise that evaluation competencies must be reoriented in response to escalating global complexity, uncertainty, and systemic crises. Evaluation competencies remain contested and are often entangled in debates over professionalization and evaluator identity, particularly as the field is increasingly expected to engage with complex systems, address persistent societal and environmental challenges, and affirm evaluation's role for the common good (e.g., Picciotto, 2021; Rowe, 2019; Schwandt, 2017).

Calls to reconsider evaluation competencies are particularly evident in the post-pandemic literature—most notably the 2023 *JMDE* special issue *Rethinking Evaluator Competencies in an Age of Discontinuity*. Critics argue that despite their continued relevance, most existing competency frameworks are overly broad and fail to meet the demands of today's complex realities, including pandemics, climate crisis, inequality, and rapid technological change (Diaz et al., 2020; Sridharan et al., 2023; Nandi & De, 2023).

This concern is echoed across the broader evaluation literature engaging with the polycrisis, which calls for evaluation to move beyond compliance- and performance-oriented norms toward more values-driven, systems-oriented, and future-facing practice (e.g., Buckton et al., 2025; Chaplowe & Hejnowicz, 2021; Ofir & Rugg, 2021; Patton, 2019a; Van den Berg et al., 2019, 2021). These calls are also reflected in global declarations of evaluative intent: notably the 2019 *Prague Declaration on Evaluation for Transformational Change* (IDEAS, 2019), the *Wolastoq Declaration on Indigenous Evaluation: Honouring, Protecting, and Mobilizing Indigenous Knowledge* (EvalIndigenous, 2024), and the 2024 *Global Declaration on Evaluation for Transformational Change* (GEF IEO et al., 2024).

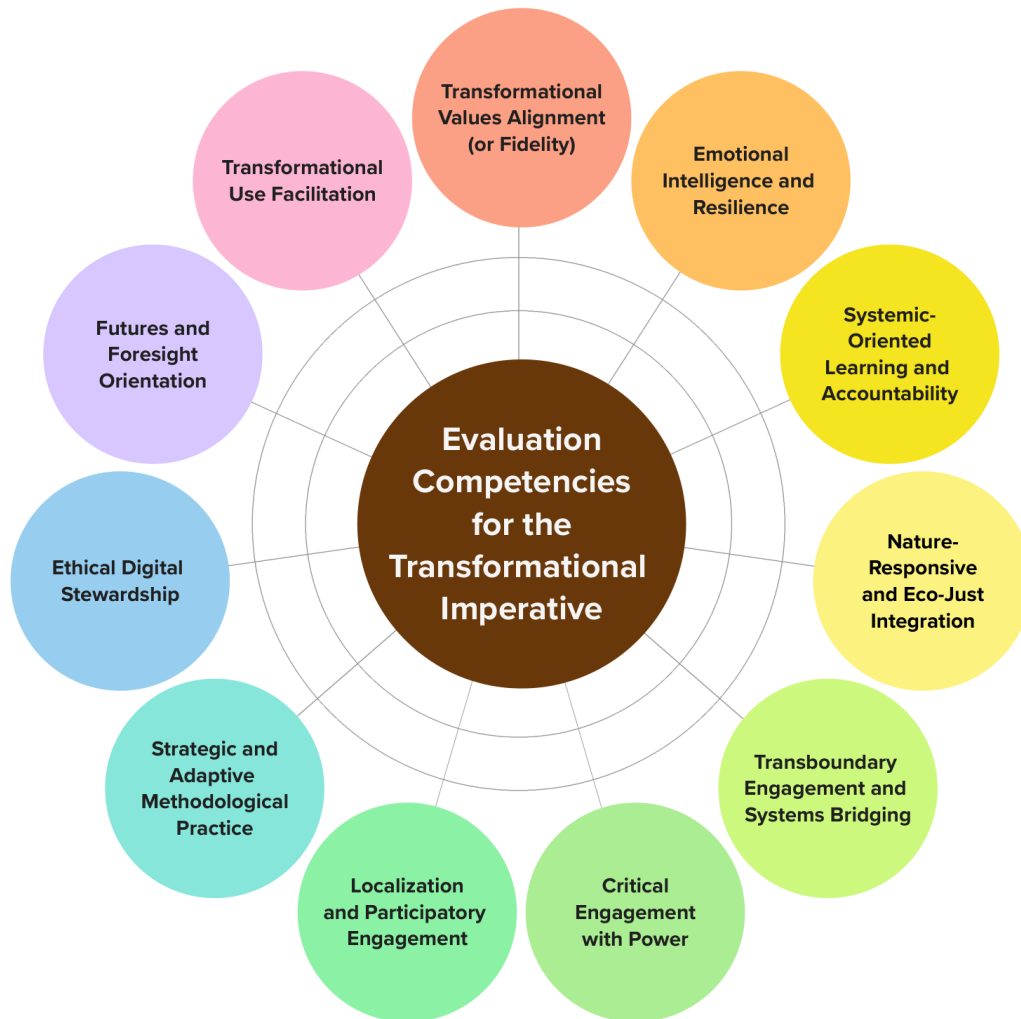
Evaluation Competencies for the Transformational Imperative

This section introduces a set of eleven evaluation competencies for evaluation to advance the

transformational imperative—see Figure 2. Rather than proposing a rigid framework, the aim is to frame competencies that support meaningful evaluative practice in complex, dynamic systems. These competencies are derived from the combined methodology outlined earlier and are

offered as a curated, flexible set to orient evaluation toward the transformational imperative rather than as an exhaustive or prescriptive framework. To that end, we begin with background to contextualize, qualify, and orient the competencies.

Figure 2. Evaluation Competencies for the Transformational Imperative



There is a long-standing tradition of articulating evaluation competencies (Kirkhart, 1981; King et al., 2001; Wilcox & King, 2013), and numerous frameworks have been developed to support various purposes, including reflection, quality assurance, instruction, professional development, credentialing, and performance assessment. As De Silva (2023) notes, these

frameworks vary in intent—some guide organizational systems; others support individual learning.

For this study, we reviewed eight such frameworks, variously labeled as “evaluator” or “evaluation” and as “competencies” or “capabilities” (AEA, 2018; AfrEA, 2020; ANZEA, 2011; AES, 2013; CES, 2018; EES, 2012; GEI,

2025; UNEG, 2016). Rather than treat these as fixed authorities to replicate or reject, we engaged them as evolving bodies of insight to be critically interpreted, adapted, and extended in light of the transformational imperative. We found considerable convergence among the frameworks, especially those led by voluntary organizations for professional evaluation (VOPEs), around core domains such as professional practice, methodological competence, interpersonal skills, and contextual understanding, consistent with findings elsewhere in the literature (GEI, 2025; King, 2023; Schwandt, 2023).

While terminology varies, there is broad agreement that competencies encompass cognitive, behavioral, and ethical dimensions that are demonstrable and observable (e.g., UNEG, 2016; GEI, 2025). In this article, we adopt a broad interpretation of evaluation competencies as the individual knowledge, skills, attitudes, and abilities that enable evaluative practice to be useful, credible, and contextually responsive—specifically, to support the transformational imperative.

These competencies are guided by evaluative values and principles, which articulate the norms and standards that inform evaluative choices and actions (Patton, 2018). In this sense, principles provide the ethical and directional grounding for competencies, while competencies express the specific abilities required to enact those principles in practice. Our approach builds on transformation-focused principles identified in recent scholarship (Buckton et al., 2025; Patton, 2019a), linking them to the capacities and capabilities needed to activate them within systems.

We intentionally use *evaluation competencies*, rather than *evaluator competencies*, to emphasize that these capacities extend beyond those who conduct evaluations. They are relevant across the evaluation system and stakeholder landscape, including evaluation funders, commissioners, managers, users, and educators.² This shift away from evaluator-centered framings is gaining traction (e.g., GEI, 2025; Rao & Nambiar, 2023; De Silva, 2023) and is essential to a systems-oriented approach that supports shared understanding, aligned expectations, and collaborative capacity to

generate, interpret, and use evaluative insight in complex, transformational contexts.

Given the growing number and diversity of competency frameworks, we were mindful of the trade-offs between developing a new, formal framework versus articulating a flexible set of competencies responding to the transformational imperative and adaptable to diverse institutional and operational contexts. We opted for the latter, offering a set of competencies that can be mapped onto existing domains and serve as a bridge between conventional practice and transformational aspirations.

This set is not intended as a rigid or dogmatic list but reflects the positionalities and collective judgment of the current author team, and is offered as a guide that can be tailored across contexts. This aligns with a growing consensus that universal frameworks are neither feasible nor desirable (King, 2023). Rather than fixed prescriptions, they should be treated as evolving guides, responsive to shifting conditions and priorities. Whynot (2023) emphasizes the interplay of domain-specific and cross-cutting competencies in equity-focused evaluation; Rao and Nambiar (2023) call for fluid, adaptive framing; and Clinton and Hattie (2021) underscore the value of fostering evaluative thinking over rigid checklists.

With this grounding, we now turn to the eleven competencies identified for evaluation that supports the transformational imperative:

1. Transformational Values Alignment (or Fidelity)

This competency refers to the ability to demonstrate transformational values and commitment to transformational action. Those involved in evaluation should recognize the urgency to respond to the global polycrisis, and act in ways that reflect the magnitude, direction, and speed of transformation (Patton, 2019a, 2021). This competency underscores the critical role for evaluation to support systemic transformations toward just and regenerative futures, evaluators' responsibility to serve this purpose, and the "skin in the game" (stake in successful transformation) of all evaluation

communities. Its use here is purely conventional and without intent to exclude or disrespect; we recognize and respect the perspectives that call for alternative, more inclusive terminology (Calanan et al., 2023; Joseph, 2018; Sharfstein, 2016).

² The term *stakeholder* is used in this article for consistency with common usage across the evaluation and development fields. We acknowledge, however, that this term can be considered inappropriate or offensive by some Indigenous peoples and

actors (Buckton et al., 2025; Patton, 2019a, 2021; Schwandt & Gates, 2016).

As such, evaluation actors need to make a personal commitment to think beyond discrete evaluands and consider their responsibility to the broader common good and transformational imperative, as well as promoting these values in the evaluative thinking of others (Leeuw & Pleger, 2023; Schwandt, 2015a, b). This commitment is not only activist but rooted in fundamental social-ecological values and mindsets, shaping relationships among humans, with nature, and between exploitation and regeneration. It represents a major shift from the traditionally neutral or *objective* position of evaluators.

This competency implies a firm understanding of how transformational change differs from more superficial change, and an ability to recognize “transformation fidelity” and, conversely, “transformation-washing.” For instance, evaluators should be able to assess whether actions on the ground match transformation rhetoric (Patton, 2019a, 2021), facilitate collective reflection on the principles guiding transformation efforts, and be wary of evaluations commissioned and shaped by vested interests in the unsustainable status quo and conducted primarily for symbolic or bureaucratic reasons; these may be morally untenable, unless evaluators are given a genuine platform to “speak truth to power” (Cox & Barbrook-Johnson, 2021; Leeuw & Pleger, 2023; Levelt & Pauw, 2022). Without such commitment to transformational values, people are likely to fall back on more superficial, isolated action.

Maintaining a commitment to *action* and attending to where there is *agency* (e.g. in civic, policymaking, or private sector spheres) is a key part of this competency (Schwandt, 2019). Evaluators must balance the risks of imperfect action and perfect inaction, particularly in light of the urgency of the transformational imperative and the dynamic complexity of the systems in which such efforts unfold. Often, timely intervention is preferable, even if imperfect, provided it includes a commitment to learning and adaptation through experimentation.

2. Emotional Intelligence and Resilience

This competency refers to the ability to recognize and manage one’s emotions, identity, values, and influence in shaping evaluative thinking, and to engage others with empathy, humility, and integrity. It draws on emotional intelligence and inner resilience to support ethical collaboration

and leadership in evaluation. Central to this is reflexive awareness of one’s positionality—how power, privilege, and lived experience shape perception and interaction—and a commitment to self-care to sustain ethical responsiveness amid uncertainty and strain.

Transformational contexts call for more than technical expertise. They demand emotional and relational intelligence, and often humility, to navigate power dynamics, embrace diverse perspectives, and build trust (Nandi & De, 2023). Emotional intelligence enables evaluators to engage with discernment, especially in contexts marked by contested values. Harnar’s (2023) notion of mindfulness and discerning judgment is particularly relevant, encouraging present-moment awareness and value clarity as foundations for ethical practice. Crucially, this emotional and relational work must be grounded in authentic values so that it is not reduced to a performative exercise but contributes meaningfully to transformation. Evaluators must remain attuned not only to systems but also to the emotional terrain in which those systems unfold.

Resilience is not mere endurance but the capacity to remain ethically grounded and adaptive under pressure. As Herberg and Torgersen (2021) note, it includes preparedness, relational trust, emotional efficacy, and improvisation—qualities vital in volatile, complex environments. In a context of increasingly frequent performative evaluations driven by institutional risk aversion (Leeuw & Pleger, 2023), resilience also requires moral clarity and the courage to challenge evaluation approaches that prioritize compliance over learning or transformation.

This resilience can be collectively cultivated through learning communities, ethical solidarity, and courageous dialogue. It includes fostering equitable relationships rooted in mutual accountability and care, aligned with principles of reciprocity and shared responsibility (Ofir, 2021). In times of polycrisis, resilience becomes a form of sustainability—not only for systems, but for the evaluator.

Ultimately, emotional intelligence and resilience shape how evaluators and others involved in evaluation *show up*, not just through action, but through presence. Practicing grounded awareness, fostering integrity, and sustaining ethical clarity may be among the most vital contributions evaluators can make today.

3. Systemic-Oriented Learning and Accountability

This competency refers to the ability to maintain a systemic-oriented approach to learning and accountability in evaluation. Transformational change occurs within complex, dynamic social-ecological systems, and reductionist, linear, and predetermined views of change focused narrowly on isolated interventions can constrain evaluation's potential to support the transformational imperative (Chaplowe & Hejnowicz, 2021). Instead, evaluation must account for complex system dynamics, including interdependence, uncertainty, and emergence (Bamberger et al., 2016; Sridharan & Nakaima, 2020; Williams & Hummelbrunner, 2010). Accountability should extend beyond the performance of individual interventions to include broader responsibilities to systemic and planetary well-being and the learning required to support it (Patton, 2019a).

Contextual awareness, including awareness of system boundaries, power dynamics, barriers, tipping points, and more, is essential to making well-reasoned judgments about how to intervene and how those interventions contribute to change alongside this context (García & Zazueta, 2015). This involves the ability to assess evaluands within a nested holarchy of systems, zooming in and out across scales while balancing local focus with broader contextual awareness, as emphasized in the “glocal” principle of Blue Marble Evaluation (Kuji-Shikatani et al., 2023; Patton, 2019a).

A critical aspect of this competency is incorporating multiple perspectives in systems analysis, recognizing that transformation cannot be understood through a single lens. Engaging a broader diversity of people helps triangulate perspectives for a richer systemic understanding (Williams & Hummelbrunner, 2010). This includes epistemologies beyond those dominant in the West and Global North—particularly from Indigenous, Global South, and other marginalized voices—and draws on embodied experience, intuition, place-based ecological knowledge, and ancestral wisdom (Gates et al., 2022; Sibanda & Ofir, 2021).

Systems analysis is important not only for assessing what has happened, but also for informing intervention design through ex-ante evaluation. It requires resilience in the face of complexity, helping stakeholders to navigate complexity to identify salient entry points, utilizing diverse approaches, including systems

mapping and evidence synthesis (discussed below).

4. Nature-Responsive and Eco-Just Integration

This competency refers to the ability to frame and conduct evaluations that recognize the deep interdependence of human and natural systems, integrating environmental sustainability, ecological justice, and the inherent rights of nature into evaluative thinking and practice. Ecosystem integrity is foundational to human well-being, and the accelerating degradation of natural systems—through climate change, biodiversity loss, habitat destruction, pollution, and unsustainable resource extraction—threatens not only development goals but the very conditions of life itself (IPCC, 2022; Rockström et al., 2023; UNEP, 2019; Dasgupta, 2021).

This requires shifting from human-centered models to those that acknowledge *coupled human and natural systems* (CHANS), where feedback loops and co-dependencies shape both resilience and vulnerability (Rowe, 2019; García & Uitto, 2025). Indigenous knowledge systems, spiritual traditions, and other ethical worldviews affirm nature's intrinsic value, honoring it as sacred, sentient, and deserving of reciprocity, not for its utility but for what it inherently is (Berkes, 2012; UN, 2009; Watson & Huntington, 2008; Whyte, 2013). Yet industrial systems treat billions of sentient animals as production units, despite compelling evidence of their capacity to suffer (Proctor et al., 2013), underscoring the need for ethical and justice-oriented evaluation.

Environmental degradation is inseparable from inequality. Wealthier populations disproportionately cause ecological harm, while the most vulnerable bear the consequences (Oxfam, 2020; World Inequality Lab, 2022). Evaluation must account for these dynamics and support socio-ecological resilience and intergenerational justice. Environmental sustainability can be integrated at multiple entry points, including theory of change, stakeholder framing, design, and criteria (Uitto & Batra, 2022). For example, reconsidering the OECD/DAC sustainability criterion to better reflect systems interdependence (Patton, 2021), or introducing frameworks like *rights of nature* to surface alternative moral paradigms (Gallagher & Ofir, 2021).

This competency is supported by evaluation initiatives such as EvalforEarth³ and Footprint Evaluation,⁴ as well as transdisciplinary frameworks like social-ecological systems and the circular economy, which emphasize the interdependence of people, planet, and systems of production and consumption.

5. Transboundary Engagement and Systems Bridging

This competency refers to the ability to collaborate across disciplinary, sectoral (public, civic, private), cultural, geographic, demographic, and epistemological boundaries to support inclusive, integrative, and systems-oriented transformation. Core practices include deep listening and relational work, convening diverse stakeholders, building trust and rapport, and facilitating spaces where multiple perspectives inform collective sense-making. In this role, those involved in or supporting evaluation act as mediators between worldviews, translating language, assumptions, values, and lived experiences into mutual understanding, breaking down divisions, and bridging perspectives (Rao & Nambiar, 2023; Kujishikatanani et al., 2023).

Systemic change emerges through networks of mutual support rather than isolated action. Transboundary engagement requires moving beyond siloed practices to connect “islands of coherence” into “ecosystems of coherence”—networks of shared intention and mutual support (Scharmer, 2024). The shift from *ego* to *eco*, and from reactive patterns to cocreative practices, exemplifies the collaboration essential to the transformational imperative. This includes knowledge exchange that values and integrates diverse ways of knowing, particularly those of marginalized or traditionally excluded groups, together with peer learning and the creation of spaces where varied experiences inform collective solutions and strengthen transformational potential.

Recognizing that systems are made up of people and that technical-only approaches fall short (Milligan et al., 2022), this competency engages people across boundaries through respectful, multidisciplinary collaboration. It supports the coconstruction of meaning, integration of diverse perspectives, and tackling of “wicked” problems. It also recognizes

evaluation’s potential to confront power inequities, human rights violations, and barriers to social justice, while enabling actionable change through policies and behaviors (Mertens, 2018; Mertens et al., 2016). As Hertwig et al. note, “Societies will struggle to address global challenges unless they are able to change behavior at scale” (2025, p. 1).

This competency requires fluency in diverse knowledge systems, supports adaptive planning in multistakeholder settings, and depends on deep listening and relationship-building for collective impact (Milligan et al., 2022). It also demands contextual sensitivity to dynamic environments and diverse perspectives. For evaluation ECD providers, it means shifting from standardized, modular training toward embedded, relational learning that prioritizes cocreation over compliance. It involves accompanying teams and institutions in real-time learning processes, tailoring support to their evolving contexts and fostering mutual accountability and systems awareness rather than one-way knowledge transfer. It also means integrating evaluation training within existing program and project management training and processes, rather than treating it as a standalone exercise, so that evaluation is understood as part and parcel of effective program and project management, from ex-ante and formative through summative and ex-post evaluative learning.

6. Critical Engagement with Power

This competency refers to the ability to critically analyze, reflect on, and navigate power dynamics across geography, time, culture, and societal levels—from local to global—as well as across sectors (public, civic, and private), and to consider how these dynamics shape both the evaluand and the system in which it is embedded. It requires particular attention to intersecting dimensions of identity and inequality, including gender, race, class, income, disability, and sexual orientation (Otrell-Cass, 2023). Understanding how gender intersects with other forms of marginalization—such as class and social hierarchies—is essential for promoting evaluation equity (Muhomba et al., 2024). Evaluators must also grapple with global power asymmetries that have historically shaped dominant evaluation paradigms, methodologies,

³ <https://www.evalforearth.org/>

⁴ <https://www.betterevaluation.org/methods-approaches/themes/footprint-evaluation>

and institutional arrangements, and be aware of how enduring systems of oppression and injustice continue to threaten the planet and influence evaluation (Abrahams et al., 2022; Masvaure et al., 2024).

The ability to engage with power dynamics is often perceived as an innate or intangible skill, rarely emphasized in formal evaluator training. Yet, like other core competencies, it must be intentionally cultivated through education and reflective practice. Historically, evaluation has been positioned as a technical and objective exercise, largely shaped by a positivist paradigmatic approach (Buckton et al., 2025) and heavily influenced by conceptions of economic rationality (Otrell-Cass, 2023). This framing has reinforced norms of neutrality and political detachment while privileging objectively verifiable evidence of what is deemed worthy of the label “progress” in society. However, evaluation is inherently political, involving epistemic power in which definitions of rigor, value, and success are often determined by those in power—for example, funders and evaluators (Sibanda et al., 2023; Hanberger, 2022). It therefore calls for a decolonizing stance: challenging dominant paradigms that marginalize Indigenous, local, and experiential knowledge, and working to legitimize multiple ways of knowing and being.

At the organizational level, it is imperative to interrogate institutional norms, rules, and practices to assess whether they perpetuate inequitable power relations rooted in colonial and postcolonial legacies (Morkel & Sibanda, 2022). Such reflection must extend beyond individual awareness to systemic transformation, to engage with power constructively, revising practices that hinder ethical, responsive, and socially just evaluation (Teasdale & Avent, 2025).

Cultivating this competency is vital for unlocking the transformational promise of evaluation, enabling it to serve not just as a mechanism of accountability, but as a force for equity, justice, and systemic change. Doing so requires moving beyond technical proficiency toward a deeper engagement with power, identity, and structural inequality. This involves a willingness to interrogate dominant paradigms, challenge entrenched hierarchies, and engage in reflective, values-driven practice that is both courageous and transformative.

7. Localization and Participatory Engagement

This competency refers to the ability to work in respectful, inclusive, and empowering ways that center the voices, priorities, and agency of local actors, especially those most affected. Such localization and participatory engagement are essential for societal transformation, as they shift power, foster ownership, and ground change in community-defined values and visions rather than externally imposed agendas. “Local” includes local-level evaluators, community leaders, civil society and grassroots organizations, service users, and frontline actors, engaged not only as data sources but as cocreators of evaluative purpose, design, implementation, and use. The call for localization is longstanding in international development and humanitarian contexts, with increasing attention in evaluation, particularly in the last decade (Baguios et al., 2021; Feinstein International Center, 2021; ICVA, 2019; Janzen et al., 2023; Kuji-Shikatani et al., 2023; Roepstorff, 2020).

Competency in localization and participatory engagement for evaluation involves building equitable partnerships, sharing decision-making, and applying cultural and contextual understanding (Lloyd & Colnar, 2023). It aligns with decolonizing evaluation by replacing extractive, externally driven approaches with reciprocity, cultural humility, and solidarity—affirming Indigenous and local knowledge as legitimate sources of insight and leadership (Chilisa & Bowman, 2023; Kelly & Htwe, 2024). Evaluation should foster shared/peer learning, strengthen local ownership and decision-making, and root transformation in community-defined values, needs, and visions, including capacity development that reinforces local systems and supports long-term, locally led practice.

Despite growing guidance (BetterEvaluation, 2024), power often remains centralized, with local actors positioned as “brokers” for funder interests rather than community needs. To avoid tokenism, localization must address power imbalances both between external actors and communities and within communities themselves (Ordóñez Llanos et al., 2024).

Meaningful participatory engagement spans the evaluation process. Locally, engagement grounded in trust, cocreation, and continuous dialogue enables evaluators to “zoom in” on lived experience and “zoom out” to link insights to systemic and global patterns, creating feedback loops that drive adaptive, transformational

solutions (Kuji-Shikatani et al., 2023). It requires cultural sensitivity, intentional inclusion, and sustained trust building (Wilde Ganzen Foundation, 2024; Cousins & Whitmore, 1998; Chambers, 1997; O’Sullivan, 2012; AEA, 2011), and bottom-up, community-responsive capacity development rather than top-down skill transfers prioritized by international funders or the Global North (Coffey, 2021).

Ethics are central to participatory engagement, demanding respect for local knowledge and inclusive processes (Arnold & Bartels, 2014). Competency in this area includes mentoring local evaluators; developing context relevant MEL systems (IDEAS, 2012); and asking *what is being evaluated, with whom, how, and why* (Zaveri, 2014). When external evaluators are engaged, they should act as facilitators—supporting spaces led by local actors and providing insights or dialogue at their request. Digital tools can further democratize participation through community-level data collection and analysis.

8. Strategic and Adaptive Methodological Practice

This competency refers to the ability to critically and flexibly apply diverse methods—including quantitative, qualitative, participatory, technological, and mixed approaches—throughout evaluation across the intervention lifecycle: before implementation (ex-ante), during implementation (formative), at completion (summative), and afterwards (ex-post). This methodological pluralism and innovation enable inclusive, contextually tailored, and credible analysis that supports adaptive and complexity-responsive evaluation in the dynamic, uncertain contexts of the polycrisis and transformational work (Bamberger, 2016; Buckton et al., 2025; Goldman et al., this issue; Patton, 2019a; Rao & Nambiar, 2023).

Emergent learning is both a driver and an outcome of this methodological openness, fostering ongoing insight and responsiveness as conditions evolve. No standardized method or toolkit fits all transformation contexts. Evaluators must creatively combine and adapt methods to suit specific conditions, as emphasized by the bricolage methods principle of Blue Marble Evaluation (Patton, 2019a). Nor is there a single universal truth in a complex system; combining methods enables incorporation of multiple perspectives to develop

a more valid, holistic, and robust analysis and understanding of the system, and the intended and unintended impacts of interventions within it (Luna Pinzon et al., 2022).

Mixed methods also help address the limitations of attribution analysis and experimental designs in complex contexts where establishing definitive causal links is rarely feasible (García & Zazueta, 2015; Junge et al., 2020). Triangulating methods provides alternative pathways to *connect the dots*, assembling credible evidence of how interventions contribute to change even when direct attribution is not possible. This is especially valuable for assessing contributions to ongoing transformations, where outcomes are still emerging but early signals of influence can be discerned (CIF, 2020).

Methodological agility not only strengthens evaluative rigor but also increases the likelihood that evaluation findings will be meaningful and usable within fast-evolving systems. Such an adaptive, integrative, and pluralist methodological approach requires proficiency in, among other areas, evidence synthesis, triangulation, systems mapping, collaborative sense-making, and abductive reasoning.

9. Ethical Digital Stewardship

This competency is the ability to strategically and ethically engage digital technologies to enhance evaluation’s potential to contribute to the transformational imperative while guarding against risks. These include artificial intelligence (AI), big data, geospatial tools, and smart sensors, which can expand participation, reveal new patterns, and automate tasks, but can also reproduce dominant destructive values, exacerbate inequities, erase Indigenous ways of knowing (Ofosu-Asare, 2025), and degrade ecosystems through energy-intensive data processing, resource extraction, and electronic waste (UNEP, 2024).

It begins with hands-on fluency, a digital muscle built through experimentation and reflection (Mollick, 2024). This is not about software operation but discernment—understanding what tools do, when to use them (Montrosse-Moorhead, 2023), and their mechanics. AI tools do not reason but pattern-match (Bender et al., 2021), and their “personalities” shift with prompts and context (Ferretti, 2023).

Oversight is essential, since fast-changing technologies cannot be governed by fixed rules

(Dell’Acqua et al., 2023). Standards remain vital (OECD, 2024; UNESCO, 2023), but those involved in evaluation must judge when to uphold boundaries and when to allow innovation (Raftree, 2024). Oversight goes beyond error-checking: As generative AI resists replication, the test becomes whether outputs are reasonable and transparent. Where results cannot be explained, limits should be acknowledged, data secured, and processes documented for consent and accountability (Cekova et al., 2025).

Ethical engagement also requires attention to power: how technology shapes whose knowledge is visible, which voices are excluded, and how design bias affects inclusion (AI Now, 2023; Bustuioc, 2021). AI risks shrinking representation to “digital traces”—the data people leave online or through devices—and silencing lived relationships and non-human actors (Thapa et al., 2025). Transformation is better supported when digital tools honor diverse ways of knowing and collective consent in shaping judgment.

Systemic awareness requires working with ethicists (Frahm & Schiölin, 2024), staying alert to “value drift,” and guarding against erosion of Indigenous knowledge (Perera et al., 2025), so that digital tools support plural ways of knowing rather than defaulting to algorithmic efficiency and the dominant knowledge sources which have trained the AI.

Cocreativity in using digital tools is urgent; otherwise, evaluators risk being marginalized or even replaced by automated processes (Nielsen, 2023). Harnessed well, these tools can make evaluation adaptive, real-time, and accessible. Beyond participation, they can democratize change, embedding evaluative thinking across communities (Quito & Raftree, 2025). Yet, technologies are remaking society faster than we grasp. The stakes, including justice, sovereignty, and planetary integrity, shift as quickly as the tools themselves. Digital stewardship means keeping humanity at the center of evaluation, asking: What change, for whom, and why?

10. Futures and Foresight Orientation

This competency refers to the ability to integrate futures thinking across evaluation cycles to anticipate emerging risks and opportunities, explore alternative futures, and inform evaluative and strategic decision-making. It emphasizes participatory foresight methods that engage diverse perspectives, navigate uncertainty, and support planning in dynamic systems where

transformational change unfolds over extended time horizons.

In futures thinking, “futures” is plural to reflect that the future is not predetermined but shaped by present and future choices, events, and systemic forces (Coon et al., 2024; Gardner et al., 2024; Lichty et al., this issue). Unlike forecasting, which predicts outcomes based on past data and probabilities, foresight explores alternative scenarios and encourages visionary thinking to prompt reflection and guide decisions. Evaluation is not new to future-oriented thinking. Formative, summative, and ex-post evaluations routinely offer forward-looking recommendations based on intervention assessments, while foresight enhances ex-ante evaluation by enabling exploration of alternative futures to inform strategic design (Blundo-Canto et al., 2024). As Patton notes, both evaluators and futurists seek to influence the present to shape the future (Patton, 2019).

Engaging with alternative futures is critical for the transformational imperative, as we face a complex unknown future and need to surface unconventional solutions and challenge assumptions. When participatory, foresight can interrogate dominant narratives, expose power over time, and cocreate just, regenerative alternatives (Coon et al., 2024; Preiser et al., 2024). Equally important is who participates and who is excluded, since whose voices are present—or absent—shapes which futures are imagined and acted upon. As systemic change can span extended, complex trajectories, foresight also supports strategy testing and adaptive management for such longitudinal timeframes.

Evaluation can draw on a range of foresight methods—such as horizon scanning, scenario planning, the Three Horizons framework, backcasting, and more (BetterEvaluation, n.d.; GO-Science, 2017; UN Futures Lab/Global Hub & International Science Council, 2025). Futures thinking also draws on longstanding Indigenous practices rooted in intergenerational responsibility and ecological reciprocity (UN Futures Lab, 2025). While there is no single formula, inclusive stakeholder engagement is essential to ensure diverse perspectives, cocreate insights, and ground analysis in lived experience and systems knowledge.

11. Transformational Use Facilitation

This competency refers to the ability to ensure that both the evaluation process and its findings inform, influence, and contribute to the

transformational imperative. This includes designing and facilitating evaluation in ways that engage diverse stakeholders in meaning-making, surfacing insights for values-based action, build commitment to using the evidence, and help ensure that evaluation activities and results align with long-term systems objectives to guide decisions responsive to the transformational imperative.

This requires attention to both the supply and demand sides of evaluation: cultivating evaluation cultures that generate credible, contextually grounded insights through inclusive and adaptive processes, while also engaging policymakers and decision-makers to shape, understand, and apply evaluative evidence. This entails building capacity and demand for critical interpretation throughout the process, and is closely linked to boundary-spanning collaboration, knowledge brokering to translate and mediate between evidence and decision-making, and power-savvy practice to enable uptake and use of evaluation (De Silva, 2023; Patton, 2019a).

Not all evaluation “use” is transformational. Evaluative evidence may inform strategic decision-making yet still reinforce harmful or unsustainable trajectories. An extreme example is an evaluation commissioned by the fossil fuel industry—one that may shape corporate strategy while simultaneously undermining climate goals. Transformational use facilitation requires critical reflection on who is using the evidence, why, and toward what vision of the future. It involves not only meeting commissioners’ needs to ensure use but also broadening their understanding of how evaluation, and the evaluand itself, can contribute to systemic learning in support of transformational change.

This competency works in concert with the competencies of transformational values alignment and systemic-oriented learning and accountability to ensure that evaluation use advances just, regenerative, and systemic change, rather than serving narrow, compliance-driven, symbolic, or vested-interest agendas (Buckton et al., 2025; Leeuw & Pleger, 2023). It requires safeguarding evaluation’s integrity through strategic framing, fostering shared ownership of evidence, and creating adaptive learning loops that link insights to long-term systems change (De Silva, 2023). Navigating political and institutional dynamics is essential to open spaces where evidence can catalyze meaningful shifts in policy, practice, and norms—while resisting tokenistic or extractive uses.

Scenario-Based Illustration of Competency Practice

The discussion above has been intentionally conceptual to clarify the nature and purpose of each competency. To help bridge this with practice, Table 1 provides illustrative examples of how the competencies may manifest across different actors in the evaluation ecosystem—including evaluators, commissioners and managers, and users of evaluation. These examples are grounded in a hypothetical scenario: a final evaluation of a livelihoods project implemented by a micro-finance institution (MFI) promoting community development through a rural micro-finance (MF) scheme. They are not prescriptive; rather, they are intended to demonstrate how each competency might take shape across different roles and contexts.

Table 1. Illustrative Applications of Evaluation Competencies Across Roles

Competency domain	Evaluator	Commissioner / manager	User of findings
Transformational Values Alignment	Assesses unintended consequences, such as inflation resulting from influx of cash; checks whether questions go beyond loan performance to empowerment, reduced vulnerability, and ecological impact; probes for “transformation-washing,” where rhetoric of women’s economic empowerment masks debt traps.	Drafts the ToR to examine who benefits, who is harmed, and how the MF scheme affects the wider local economy and ecosystems over time; resists pressures to limit the evaluation to repayment rates and success stories; is open to findings that challenge MF models.	Interprets results against commitments to the common good and long-term resilience, not only portfolio performance; uses evidence to question exploitative lending norms or short-term targets; champions shifts in strategy when values and practice are misaligned.
Emotional Intelligence & Resilience	Listens to over-indebted borrowers and struggling entrepreneurs; manages own reactions in meetings where partners feel blamed; remains steady and principled when presenting difficult findings about elite capture or harmful lending practices.	Anticipates strong emotions among implementing staff and partners; sets up debriefs and safe spaces for sensemaking rather than blame; supports evaluators who face pushback for uncomfortable truths.	Responds constructively to evidence that certain groups (e.g., poorer women, youth) have been excluded or harmed; manages defensiveness in leadership teams; encourages staff to see critical findings as an opportunity for learning rather than a threat.
Systemic-Oriented Learning & Accountability	Maps how MF interacts with local markets, social norms, and household dynamics; analyzes system interactions and feedback (e.g., debt cycles, price shifts, gendered labor burdens); employs contribution analysis and other complexity-responsive methods to assess MF impact.	Encourages a portfolio approach; promotes evaluations that look beyond this single MF program to the wider financial ecosystem and policy context; links accountability requirements to learning about system change, not just compliance with logframe indicators.	Uses findings to adjust broader livelihoods and financial inclusion strategies (e.g., combining credit with social protection, skills, or market interventions); looks for patterns across districts or partner organizations; brings system-level insights into policy or board discussions.
Nature-Responsive & Eco-Just Integration	Examines how supported MF enterprises affect soil, water, biodiversity, and animal well-being (e.g., small livestock, agro-processing); integrates climate and environmental risks into the analysis of sustainability and resilience; asks whose environments are degraded and who benefits.	Requires the evaluation to look at ecological as well as economic outcomes (e.g., deforestation for charcoal businesses, pollution from small workshops); ensures criteria and questions reflect intergenerational and ecological justice, not only income gains.	Uses evidence to phase out or redesign environmentally harmful micro-enterprises; supports options that strengthen both livelihoods and ecosystem health (e.g., regenerative agriculture, circular enterprises); communicates trade-offs transparently to communities and funders.
Transboundary Engagement & Systems Bridging	Brings together local government, MFIs, NGOs, community groups, and private-	Sponsors cross-sector reference groups representing borrowers, local authorities,	Participates actively in cross-boundary learning spaces; shares how findings

Competency domain	Evaluator	Commissioner / manager	User of findings
Critical Engagement with Power	sector actors to jointly interpret findings; facilitates conversations that translate among financial language, lived experience, and policy concerns; highlights connections between “islands” of good practice. Analyzes who accesses loans and on what terms; probes how gender, caste/class, ethnicity, or land ownership shape eligibility and risk; makes visible whose voices are missing from design and decision forums; surfaces how donor and MFI priorities shape “success” metrics.	financial institutions, and civil society; supports collaboration across silos and communities of practice in the MF sector; allocates resources for sustained cross-system engagement beyond the evaluation. Is willing to commission an evaluation that examines power asymmetries in governance structures, loan conditions, and grievance mechanisms; supports evaluators in raising issues of exploitation, coercive repayment, or local elite capture without silencing them.	resonate (or not) with community realities or program operations; brokers relationships between local actors and higher-level decision-makers to carry forward agreed changes. Uses findings to challenge inequitable program rules (e.g., collateral requirements that exclude poorer households, male-dominated committees); supports reforms that shift voice and decision power toward those most affected; advocates for fairer financial practices with partners and regulators.
Localization & Participatory Engagement	Co-designs evaluation questions with local groups (e.g., women’s savings groups, youth associations); engages local evaluators and facilitators; uses participatory tools (e.g., community timelines, participatory ranking) to understand how MF affects daily life and local visions of well-being.	Invites local stakeholders to co-design the ToR and be part of the evaluation reference group; budgets for participatory workshops in local languages; engages community-based organizations as partners, not just informants; supports capacity strengthening of local actors to lead or co-lead future evaluative work.	Uses evaluation processes and findings to strengthen local planning (e.g., community development plans, cooperatives); fosters peer learning between communities on what works and what harms; advocates for locally defined success indicators in future MF program designs.
Strategic & Adaptive Methodological Practice	Combines financial data (repayment, default, loan size) with qualitative inquiry into household economies, gender norms, and social networks; adapts methods when shocks arise (e.g., drought, price spikes) to capture emerging dynamics; triangulates data to build a credible contribution story without over-claiming causality.	Allows flexibility in the design (e.g., scope, methods, sample) as new insights emerge; accepts that experimental or attribution-focused designs may be limited in this complex setting; supports use of mixed and participatory methods to answer learning and accountability questions.	Understands the strengths and limitations of the methods used when interpreting results; resists oversimplifying nuanced findings into a single “success/fail” judgment; requests follow-up inquiry where evidence is promising but incomplete for major decisions.
Ethical Digital Stewardship	Uses digital tools such as mobile surveys, MIS data, or GIS mapping to understand MF outreach and patterns of access; checks for bias in who is included (e.g., phone owners vs. others); ensures consent, privacy, and data security; is aware of the environmental footprint of data storage and devices.	Sets expectations for responsible use of client data from MF and digital platforms; requires anonymization and secure handling of borrower information; questions whether digital methods exclude off-grid, low-literacy, or marginalized groups; considers lifecycle and e-waste implications of hardware.	Interprets dashboards and digital visualizations critically (who is missing, what isn’t captured); asks for accessible, low-bandwidth products that communities and local partners can understand and use; advocates for digital approaches that enhance, rather than replace, human relationships.

Competency domain	Evaluator	Commissioner / manager	User of findings
Futures & Foresight Orientation	Works with stakeholders to explore alternative futures for local livelihoods (e.g., climate shocks, interest-rate changes, shifts in migration or markets); uses simple scenarios to test how the MF model might perform under different conditions; links findings to ex-ante considerations for future program design.	Commissions the evaluation to include forward-looking questions (e.g., “What would it take for these businesses to remain viable in 10–15 years?”); uses foresight insights alongside evaluation findings to inform country strategies or financial-inclusion policies.	Uses scenario-informed findings when deciding whether to scale, pivot, or phase out the current model; considers long-term resilience, climate risks, and intergenerational effects rather than focusing only on immediate repayment and short-term income gains.
Transformational Use Facilitation	Facilitates collective sensemaking that questions foundational assumptions of the MF model and explores transformative alternatives; surfaces how the intervention interacts with long-term systemic forces (e.g., climate stress, gendered unpaid labor, rural financial exclusion) and identifies leverage points for system redesign.	Uses evaluation as a platform to reconsider the organization’s role in the livelihoods ecosystem; aligns decision-making forums so evaluation prompts coherent shifts in policies, funding models, and partnerships contributing to transformative change.	Leverages findings to influence policies, norms, and market rules that shape local economies; supports community-led visions of transformation; tracks whether implemented changes advance structural shifts rather than incremental improvements.

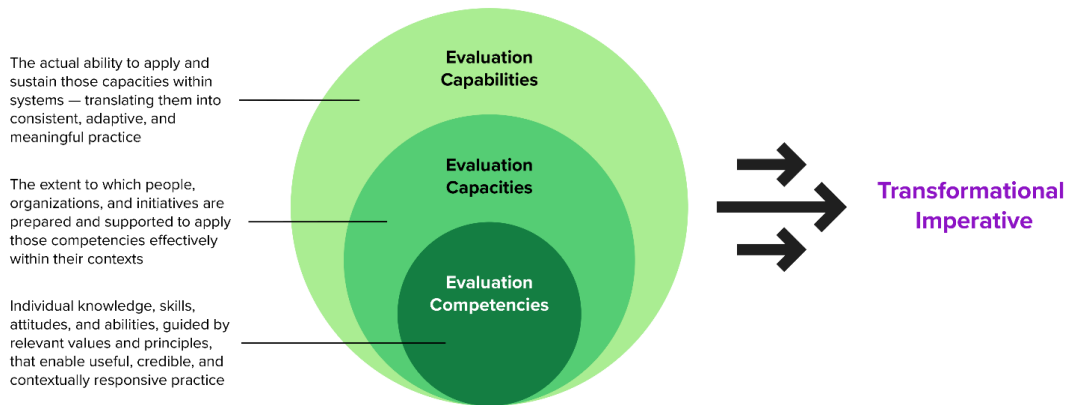
From Individual Competency to Systemic Capacity and Capability

The transformational imperative demands more than the development of individual competencies—it requires readiness and capability at organizational and systemic levels. This section offers a brief examination of how institutional and systemic capabilities can support the development and meaningful application of competencies—facilitating capacity to act within dynamic, complex, and often resistant systems in ways that advance the transformational imperative.

We refer to the 3Cs as a framework for scaling evaluation readiness to meet the transformational imperative—see Figure 3.

Competencies encompass individual knowledge, skills, attitudes, and values. **Capacities** reflect the extent to which individuals and institutions are prepared to mobilize and apply those competencies in practice. **Capabilities**, meanwhile, refer to the systemic and structural conditions, such as leadership, evaluation standards, criteria, and resources, that shape whether and how both competencies and capacities are activated. These broader systems can either enable or constrain this application, highlighting that transformation-oriented evaluation depends not only on individual competence but on the institutional and systemic ecosystems that can either constrain or sustain it.

Figure 3. The 3Cs: Scaling Evaluation Competencies for Systemic Impact



Much of the current focus in evaluation training and capacity development has centered on strengthening individual or team-level competencies, particularly in the generation and utilization of evidence for decision-making, policy and program adjustment, accountability, and organizational learning (Preskill & Boyle, 2008; Konjore, 2024; Trevisan, 2004). However, organizations and their broader contexts exert considerable influence on how those competencies are applied. The relationships among competencies, capacities, and capabilities are complex and dynamic, each shaping and being shaped by the others across different institutional and temporal contexts (Bourgeois & Cousins, 2013; Chaplowe & Cousins, 2016; Williams et al., 2024).

Yet, limited attention has been paid to the organizational capabilities and broader context that either enable or constrain the application of

individual competencies. As Bourgeois and Cousins (2013) note, “little attention has been directed toward defining organizational evaluation capacity itself” (p. 300). Many evaluation capacity development (ECD) initiatives assume institutional readiness to support and apply newly acquired competencies. However, organizations may lack the maturity or flexibility to translate learning into sustained evaluation practice, leaving competencies underutilized or dormant (Sridharan et al., 2023). Meeting the transformational imperative thus requires a fundamental shift: from a narrow focus on individual capacity building to investing in institutions that actively enable and sustain ECD that contributes to the transformational imperative.

This raises a critical question: *What distinguishes institutions that not only support but actively enable the transformational*

imperative? Understanding these characteristics is essential to designing ECD interventions that move beyond individual competence to foster institutional ecosystems that are adaptive, learning-oriented, and capable of sustaining meaningful change.

From Organizational Readiness to Adaptive Maturity

Bourgeois and Cousins (2013) identify six dimensions of organizational readiness for evaluation: human resources, organizational resources, evaluation planning and activities, evaluation literacy, decision-making, and learning benefits. However, Sridharan et al. (2023) caution against “evaluation capture,” where evaluation becomes overly routinized, noting that institutional arrangements can either support or constrain evaluators’ agency. In emerging country-led national evaluation systems, Goldman et al. (2024) similarly warn of institutional isomorphism—the uncritical adoption of globally legitimized models that may limit contextual responsiveness.

Institutions must therefore evolve, not only by updating outdated structures (e.g., siloed departments and rigid hierarchies), but by reassessing their core purpose and orientation. As Scharmer (2025) argues in the context of higher education, genuine transformation involves reconnecting with deeper societal and ecological values—what he terms the “intertwined regeneration of soil, society, and self.” This insight applies to evaluation systems and the ecosystems that sustain them.

This evolution also requires cultivating organizational learning. To adapt meaningfully to complexity and align with transformational goals, institutions must move beyond single-loop learning (doing things better) to embrace double- and triple-loop learning (rethinking assumptions and purposes). These deeper forms of learning challenge prevailing norms and require reflexivity, inquiry, and dialogue (Kuji-Shikatani et al., 2023). Institutional capability, in this sense, involves creating space and structures for continuous learning, feedback, and adaptation.

Embedding Systems Thinking in ECD for the Transformational Imperative

The increasing uptake of systems thinking in evaluation reflects a shift toward more holistic, interconnected approaches that can inform ECD

strategies in support of transformation-focused evaluation. It emphasizes the non-linearity of change, where outcomes emerge from dynamic interactions among system components, rather than from isolated interventions (Williams & Hummelbrunner, 2010). Transformational change rarely follows from technical fixes alone; it occurs when evaluative practice is principles- and values-driven, integrated with systems change, and responsive to context and stakeholders (Patton, 2021; Chilisa & Mertens, 2021).

To support the transformational imperative, ECD strategies must reflect this systemic perspective—developing capabilities across individuals, institutions, and the ecosystems in which they are embedded. This requires moving beyond static models of skills delivery toward more integrated, relational approaches that account for complexity, feedback, and power.

To meet the transformational imperative, ECD strategies must evolve not only in form and function, but also in scope. Traditional approaches often rely on discrete, time-bound learning interventions—ranging from training and workshops to webinars, e-learning, and blogs—typically focused on technical skills (Bourgeois et al., 2022). While such efforts may build competencies, they are often disconnected from the broader context that determines whether learning is transferred into sustained and meaningful practice. For instance, mentoring, coaching, and learning-by-doing are powerful approaches that embed learning within real-world contexts and support longer-term capability development.

Without attention to the wider ecosystem, including evaluation policies, VOPE and related professional standards, funding priorities, and commissioning practices, even well-developed competencies may remain underutilized or ineffective. ECD must move beyond isolated interventions toward a coherent, systemic strategy that embeds evaluation within institutional missions, values, and learning systems.

To be effective, ECD must engage the conditions that shape whether competencies and capacities are applied in practice. This includes fostering environments that support continuous learning through reflective leadership, inclusive dialogue, and a culture that normalizes feedback and values learning-by-doing, experimentation, and failure as a learning opportunity. Examples include the M&E Sandbox, which fosters experimentation and collective learning (UNDP, 2022), and the Transformational Learning

Partnership (TLP), a CIF-hosted community of practice that promotes collaborative learning and shifts the focus from capacity building to capability development (CIF, n.d.).

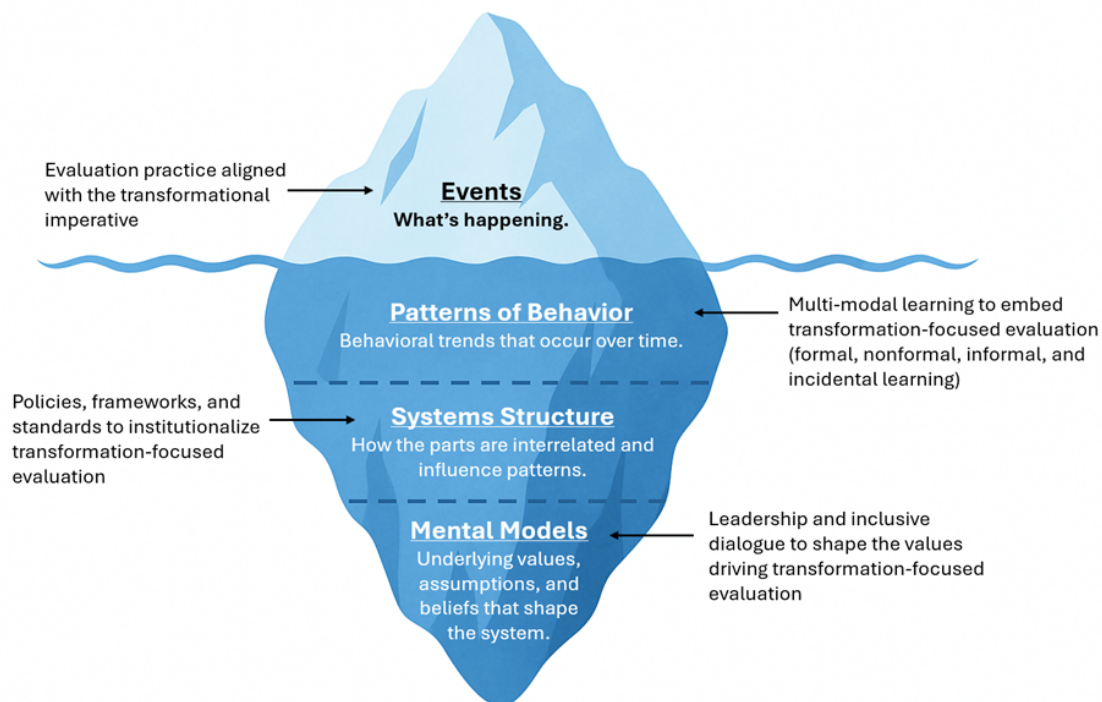
Beyond the institutional level, ECD must also address the broader systems in which organizations and evaluation are embedded. Power relations, historical inequities, and global-local dynamics all shape the extent to which evaluation competencies can be activated or suppressed. This calls for the cocreation of ECD initiatives with local actors, resisting extractive or deficit-based approaches in favor of justice-oriented, context-responsive models.

ECD strategy also requires alignment among leadership, incentives, and systems change. It calls for leadership that embraces complexity and challenges entrenched structures, while creating

the institutional space for deeper, double- and triple-loop learning. This shifts the focus from “what” and “how” to “why are we doing this?” and “does it still serve the transformational future we seek?” According to Kuji and colleagues, “With this transformation in worldviews comes significant change in direction and action” (Kuji-Shikatani et al., 2023, p. 34).

The iceberg model from systems thinking offers a helpful lens—distinguishing visible practices from the deeper behavioral patterns, structures, and mental models that shape them (Donella Meadows Project, n.d.). A coherent ECD strategy must engage all of these levels to leverage transformation-focused evaluation, as illustrated in Figure 4.

Figure 4. A Systemic Perspective on Transformation-Focused ECD



Source: Chaplowe (2024), adapted from *System Thinking Resources: The Iceberg Model*, by the Donella Meadows Project, n.d. (<https://donellameadows.org/systems-thinking-resources/>).

At the event and behavioral levels, ECD must promote practical engagement through formal, informal, and incidental learning that equips diverse actors to respond reflexively to real-world challenges. At the structural level, institutions must align evaluation policies, frameworks,

incentives, and decision-making processes to support learning, practice, and adaptation. At the base of the iceberg—mental models—leaders must create space for values-driven dialogue that challenges entrenched norms and reimagines the role of evaluation.

In sum, an ECD strategy must adopt a systemic ecosystem perspective—one that deliberately engages with the underlying beliefs, power dynamics, and institutional cultures that shape evaluation's potential to contribute to transformational change. These deeper system dynamics are central to developing capabilities that enable conditions that determine whether competencies and capacities are meaningfully activated and sustained.

Closing Reflections

This article has argued that evaluation's contribution to the transformational imperative depends, in part, on a reorientation of its competencies—one that is systemic, values-driven, and futures-facing. The knowledge, skills, attitudes, and values that once defined evaluation are no longer sufficient in a world marked by escalating complexity, deepening inequalities, ecological crisis, and rapid technological change. Evaluation must therefore embrace competencies that are systemic, future-facing, values-driven, and responsive to multiple ways of knowing. Yet competencies are only one dimension of the equation; their effectiveness depends on alignment with core values and with the institutional and systemic capacities and capabilities needed to activate and sustain them.

Building on a Three Horizons foresight process, a targeted literature review, and the authors' combined experience, we elaborated eleven competencies that orient evaluation toward the transformational imperative. These range from values alignment and emotional resilience to futures orientation, eco-justice, technological responsiveness, and transformational use. Collectively, they point toward a practice that is technically competent, ethically grounded, relationally adept, reflexive about power, and attuned to long-term systemic trajectories. Importantly, these competencies extend beyond evaluators to the full ecosystem of actors involved in commissioning, managing, conducting, and using evaluation. Transformation requires collective alignment and cocreation, not isolated skillsets.

Competencies cannot be understood apart from the environments that determine whether they can be meaningfully applied. This is where the 3Cs framing—competencies, capacities, and capabilities—becomes critical: Advancing the transformational imperative requires all three dimensions. ECD, in this sense, is much more about cultures and ecosystems than about

individuals. It requires institutions that prioritize learning over compliance, funders that invest in co-owned, long-term processes, and networks that foster peer learning and accountability. It also calls on evaluators and allies to resist transformation-washing, challenge tokenism, and speak truth to power.

This orientation is not without risks. Competencies such as futures orientation, power-savvy practice, or eco-justice may challenge entrenched hierarchies and vested interests. Yet the stakes of inaction are greater: Clinging to business-as-usual risks rendering evaluation irrelevant—or complicit in unsustainable trajectories. By contrast, embracing the transformational imperative opens space for evaluation to contribute to regenerative futures.

The transformational imperative is not a fixed destination but an emergent journey in highly dynamic contexts. Evaluation competencies must therefore remain adaptive—evolving through practice, learning, and inclusive dialogue across geographies, sectors, and disciplines. For this reason, we have not proposed a new framework but instead offer a curated synthesis to orient evaluators, educators, funders, and institutions toward the transformational imperative. The value lies less in the list itself than in the stance it models: openness, reflexivity, systems awareness, and commitment to the common good. If the competencies identified here catalyze dialogue, experimentation, and adaptation, they will have fulfilled their purpose.

Foregrounding values is essential here: The competencies we identify are not only about knowledge and skills, but about the values and ethical commitments that orient attitudes in evaluation toward regenerative rather than extractive futures. Without this values base, competencies risk being applied instrumentally or even co-opted in ways that reinforce business-as-usual.

Ultimately, the transformation of evaluation is inseparable from the transformation of the world it serves. Evaluation does not stand outside systems; it is woven into them. Its competencies are not only professional skills but ethical choices about how we live together on a fragile planet. The invitation is not to perfect evaluation in isolation, but to cocreate practices that contribute to just, regenerative, and sustainable futures.

This article is one contribution to that collective effort. The work ahead requires many voices and will unfold through practice, experimentation, and dialogue. We invite evaluators, commissioners, managers,

policymakers, educators, funders, and communities to join in co-shaping the competencies, capacities, and capabilities that will allow evaluation to meet the transformational imperative—and, in doing so, to help shape what comes next.

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