Charting a path toward local capacity strengthening: Systems and tools for mapping and planning

Webinar co-hosted by Data for Impact and MOMENTUM Monitoring, Evaluation, Innovation, and Learning Working Group

Date: September 6, 2023, 9-10 am EDT
Zoom Logistics

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Closed Captioning (sous-titrage codé)

Please select closed captioning if you wish to see live captioning of the session.
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<td>Introduction</td>
<td>Jessica Fehringer, PhD</td>
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<td>USAID Local Capacity Strengthening Policy</td>
<td>Barbara Rawlins, MPH</td>
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<td>MOMENTUM Knowledge Accelerator Consultants</td>
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<td>Local experiences with D4I’s Research and Evaluation Capacity Assessment Tool and Resource Package (RECAP)</td>
<td>Samson B. Adebayo, MSc, PhD</td>
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<td>Data Research and Mapping Consult, Ltd.</td>
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<td>Panel Q&amp;A and Discussion</td>
<td>Liz Millar, MPH</td>
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<td>Data for Impact</td>
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Generate Evidence
Use routine and other existing data and generate new data through rigorous methods tailored to budget, timeline, and context

Integrate Gender
Integrate gender throughout the project to ensure high-quality data for assessment of health and gender outcomes

Strengthen Capacity
Strengthen capacity through fostering collaboration, experimental learning, mentoring, and peer networks tailored to partner’s needs

Promote Data Use
Visualize and communicate data in ways that are compelling, user-friendly, and actionable

Ensure Data Quality
Focus on ensuring high-quality data for effective decision making and program outcome improvement

Learn
Encourage collaboration, improved results, and timely progress updates through idea exchange and shared learning
Localization and Capacity Strengthening at USAID

Barbara Rawlins, USAID, GH/MCHN/RP
Vision: USAID envisions expanding the share of its programs that are locally led, in which a diverse group of local actors define priorities, design projects, drive implementation, measure and evaluate results, and more fully own and sustain efforts to save lives, reduce poverty, strengthen democratic governance, reduce corruption, address climate change, work to prevent conflicts, respond to global pandemics, and emerge from humanitarian crises.

Localization principles must also inform our engagement beyond our projects: our convenings, the expertise we seek, our policy reform dialogues, and all the ways we engage in development.

If we truly want to make aid inclusive, local voices need to be at the center of everything we do.

USAID ADMINISTRATOR
SAMANTHA POWER

See: https://www.usaid.gov/localization
A Decade of Localization at USAID

Launch Implementation and Procurement Reform
Issue Local Systems Framework
Launch Local Works
First Local Works Missions Selected
USAID’s J2SR
Issue update to ADS 201
Launch New Partnership Initiative
PEPFAR Local Partner Transition
Administrator’s Georgetown Speech
Launch of Agency Local Capacity Strengthening Policy
The Approach: Four Pillars of Localization

1. **Adapt our policies and program practices** to foster locally sustained change that is tied to each country’s unique political, social, cultural, economic, and environmental conditions, while targeting the drivers of and barriers to change.

2. **Shift power to local actors** and ensure they have a meaningful seat at the table. Localization requires integrating a diverse group of local voices and leadership into all aspects of our work.

3. **Channel a larger portion of assistance** directly to credible local partners while ensuring accountability for the appropriate use of funds and achievement of development and humanitarian results. Align awards and activities to individual local partners’ goals, capacities, and experience with USAID.

4. **Serve as a public advocate and thought leader** at the global and country level, using our convening authority, partnerships, voice, and the power of example to catalyze a broader shift to locally led development.
Local Capacity Strengthening: A Key to Advancing USAID’s Localization Agenda

USAID’s Local Capacity Strengthening (LCS) policy commits the agency to a unified, cohesive, and systemic approach for collaborating with local partners to:

• Define their own vision for success;
• Strengthen their ability to be effective and relevant actors within their local communities and contexts;
• Elevate local ownership in sustaining development results.

See: https://www.usaid.gov/
Localization Targets

**Target 1:** USAID will provide at least a quarter of all our program funds directly to local partners by the end of FY 2025.

**Target 2:** USAID will take steps to ensure that by 2030, fifty percent of our programming will place local communities in the lead to co-design a project, set priorities, drive implementation, and/or evaluate the impact of our programs.
# Tracking Locally Led Programs

## Categories

<table>
<thead>
<tr>
<th>Working Directly with Local Partners</th>
<th>Creating Effective Local Partnerships</th>
<th>Recognizing, Leveraging, and Strengthening Local Capacity</th>
<th>Engaging Communities Directly</th>
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## 14 Good Practices

- Prime implementing partner/partner government
- Co-design
- Flexible award types
- Indirect cost recovery
- Demand-driven capacity-strengthening
- Capacity strengthening to work directly with USAID
- Monitoring, evaluation, and learning plan incorporates local priorities for success
- Local subawards >50 percent of the budget (assistance)
- Transition awards
- Local evaluation expertise
- Co-creation
- Listening tour
- Accountability and feedback plan
- Participatory monitoring, evaluation, and learning
USAID distinguishes between tools used to assess organizational performance versus capacity strengthening action planning and risk assessment.

Established and Emerging USAID Localization and Capacity Indicators

Established

- CBLD 9: the percent of U.S. Government-assisted organizations with improved performance
- This is an agency-wide standard foreign assistance indicator in widespread use. PIRS and other resources related to CBLD-9 are available here: https://www.usaid.gov/npi/capacity-building-indicator-resources

Being Pilot Tested (by the New Partnerships Initiative)

- CBLD-10: Value ($) of non-donor resources mobilized for local development priorities
- CBLD-11, Number of organizations pursuing their own performance improvement priorities with USG capacity strengthening support
The MOMENTUM Suite

• Suite of interconnected awards working to:
  • accelerate reductions in maternal, newborn, and child mortality and morbidity.
  • improve equitable access to high-quality voluntary family planning and reproductive health care.

• 6 centrally-managed awards.
• 5 Mission-led bilaterals (to date).
• Awards started on a rolling basis beginning in January 2020.

MOMENTUM Knowledge Accelerator is the “Connector” award focusing on

• Monitoring & Evaluation
• Knowledge Management
• Adaptive Learning
• Strategic Communication
Capacity Mapping and Monitoring System

D4I and MOMENTUM Knowledge Accelerator Webinar

Meg Kinghorn and Beryl Levinger, Consultants
MOMENTUM Knowledge Accelerator

September 6, 2023
Today’s Capacity Mapping and Monitoring System Discussion

CMMS Overview

• What is it?
• What are its features and innovations?
• What results are generated?
• How is evidence gathered and utilized?
• What is available to interested users?
The Capacity Mapping and Monitoring System

A systems-oriented tool ...

... based on the Enhanced Capacity Development Framework

... that assists NGO/CSO partners and program implementers in identifying needed Capacity Development course corrections in a timely manner.
Innovations – It’s not about the Mapping, but the Evidence-based Monitoring!

CMMS stimulates critical, evidence–based thinking about performance

1. **User-centric** – Centered on the NGO/CSO’s vision of what it is trying to become or accomplish.

2. **Urgency index** – performance strength + priority rating.

3. **Drivers and determinants** of +/- performance.

4. **Real-time data analysis**.

5. **Sources of and use for evidence**.

6. **Integration of capacity measurement and capacity strengthening** – 100-day plans, regular monitoring, focus on drivers.
Additionally …

• Mirrors the principles of USAID’s draft Capacity Development (CD) Policy and criteria for CBLD-9.

• Draws upon systems thinking, complexity, resilience, and adaptive management.

• Builds upon insights about the why and how CD changes occur.

• Flexible regarding the timing and frequency of data collection.
<table>
<thead>
<tr>
<th>Capacity domain</th>
<th>Practice area</th>
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<tbody>
<tr>
<td>Attracts &amp; sustains support</td>
<td>Regularly communicates with <em>stakeholders</em> about organizational achievements and challenges</td>
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<tr>
<td>Attracts &amp; sustains support</td>
<td>Provides stakeholders, <em>on an ongoing basis</em>, with <em>meaningful</em> opportunities to contribute to the organization’s work</td>
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<tr>
<td>Attracts &amp; sustains support</td>
<td>Actively participates in multi-stakeholder networks</td>
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<tr>
<td>Attracts &amp; sustains support</td>
<td><em>Frequently</em> shares useful information and valuable resources with peer organizations</td>
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<tr>
<td>Aligns systems for agility</td>
<td><em>Routinely</em> tasks cross-functional teams to meet objectives</td>
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<td>Aligns systems for agility</td>
<td>Consistently <em>takes steps to recruit staff members from the local community</em>.</td>
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<td>Aligns systems for agility</td>
<td><em>Consistently</em> manages finances so that <em>stakeholders</em> receive timely, useful and accurate information.</td>
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<td>Aligns systems for agility</td>
<td>Secures <em>sufficient</em> support from different sources to ensure that funding streams are diversified</td>
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<td>Aligns systems for agility</td>
<td>Maintains reserve funds to cover at least two months of operational activity.</td>
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<tr>
<td>Fosters self-determination</td>
<td><em>Regularly</em> communicates a transformative vision of an ideal future to <em>diverse stakeholder groups</em></td>
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<td>Fosters self-determination</td>
<td><em>Routinely</em> takes initiative to mobilize resources as new community needs emerge</td>
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<td>Fosters self-determination</td>
<td><em>Routinely</em> sets aside times for staff, volunteers and stakeholders to reflect on values and practices</td>
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<tr>
<td>Fosters self-determination</td>
<td>Consistently <em>demonstrates practices</em> that builds leadership capacity all staff levels</td>
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<tr>
<td>Fosters self-determination</td>
<td><em>Periodically</em> identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development</td>
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<tr>
<td>Learns &amp; adapts</td>
<td><em>Routinely</em> solicits and uses stakeholder feedback to expand impact</td>
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<tr>
<td>Learns &amp; adapts</td>
<td><em>Regularly</em> scans for trends relevant to organizational mission and services</td>
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<tr>
<td>Learns &amp; adapts</td>
<td>Regularly uses data to monitor project performance</td>
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<tr>
<td>Learns &amp; adapts</td>
<td>Meets <em>regularly</em> to learn lessons from project successes and failures</td>
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<tr>
<td>Learns &amp; adapts</td>
<td><em>Routinely</em> fosters innovations by testing out new ideas</td>
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<tr>
<td>Produces sustainable results</td>
<td><em>Consistently</em> offers services that reflect user needs and preferences</td>
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<tr>
<td>Produces sustainable results</td>
<td>Routinely works with stakeholders to create a strategy for sustaining results when external support ends</td>
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<tr>
<td>Produces sustainable results</td>
<td><em>Periodically</em> assesses current practices against quality standards</td>
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<tr>
<td>Produces sustainable results</td>
<td><em>Regularly</em> works with local communities to build upon their assets and ideas</td>
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<tr>
<td>Produces sustainable results</td>
<td><em>Consistently</em> promotes solution to develop challenges that address root causes</td>
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</table>
CMMS results

- **Practice rating**: Organization demonstrates this practice routinely in their ongoing work.
- **Asset**: Organization inconsistently demonstrates this practice in their ongoing work.
- **Challenge**: Organization has not yet incorporated this practice into their ongoing work.

- **Priority rating**: Critical to success at this time.
- **High**: Important but not critical to success at this time.
- **Medium**: Not important to success at this time.

- **Urgency index**: Not important to success at this time.
- **Low**: Critical to success at this time.

- **Performance driver rating**
  - Knowledge / skills
  - Resources
  - Supportive leadership
  - External relationships
  - Norms or culture

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**Practice Rating**

| Strength: Organization demonstrates this practice routinely in their ongoing work. |
| Asset: Organization inconsistently demonstrates this practice in their ongoing work. |
| Challenge: Organization has not yet incorporated this practice into their ongoing work. |

**Priority Rating**

| High: Critical to success at this time. |
| Medium: Important but not critical to success at this time. |
| Low: Not important to success at this time. |

**Urgency Index**

- **High**: Need, Need, Nice
- **Medium**: Need, Nice, Nice
- **Low**: Nice, Not, Not

**Performance Drivers**

- Knowledge / skills
- Resources
- Supportive leadership
- External relationships
- Norms or culture
## Mapping Analysis in Excel

<table>
<thead>
<tr>
<th>Driver: Resources</th>
<th>Driver: Relations</th>
<th>Driver: Leadership</th>
<th>Driver: Skills/KN</th>
<th>Driver: Norms</th>
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</thead>
<tbody>
<tr>
<td>Practice Priority</td>
<td>Practice Rating</td>
<td>Urgency</td>
<td>Practice Priority</td>
<td>Practice Rating</td>
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### Attracts & sustains support
- Actively participates in multi-stakeholder networks

### Fosters self-determination
- Regularly communicates a transformative vision of an ideal future to diverse stakeholder groups
- Consistently demonstrates practices that builds leadership capacity all staff levels

### Learns & adapts
- Regularly scans for trends relevant to organizational mission and services

### Produces sustainable results
- Periodically assesses current practices against quality standards
<table>
<thead>
<tr>
<th>Practice</th>
<th>Practice Priority</th>
<th>Urgency</th>
<th>Resources</th>
<th>Relation</th>
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<td>Frequently collaborates with cross-sectoral actors to address issues of common concern</td>
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<td>Regularly communicates with stakeholders about organizational achievements and challenges</td>
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<td>Provides stakeholders, on an ongoing basis, with meaningful opportunities to contribute to the organization’s work</td>
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<td>Frequently shares useful information and valuable resources with peer organizations</td>
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<td>Builds agility</td>
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<td>Routinely tasks cross-functional teams to meet objectives</td>
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<td>Secures sufficient support from different sources to ensure that funding streams are diversified</td>
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<td>Consistently manages finances so that stakeholders receive timely, useful and accurate information.</td>
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<td>Consistently maintains reserve funds to cover at least two months of operational activity.</td>
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<td>Routinely has representation from the organization’s stakeholder community on implementation teams.</td>
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<td>Fosters self-determination</td>
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<td>Introduces, on a timely basis, initiatives to address emerging needs</td>
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<td>Regularly communicates a transformative vision to diverse stakeholder groups</td>
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<td>Periodically identifies strengths and growth areas as part of an ongoing, self-directed process of capacity development</td>
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<td>Routinely sets aside times for staff, volunteers and stakeholders to reflect on values and practices</td>
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<td>Consistently practices leadership that builds distributed leadership capacity</td>
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<td>Routinely fosters innovations through small-scale experiments</td>
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<td>Uses periodic meetings to analyze causes and effects of program successes and failures</td>
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<td>Routinely solicits and uses stakeholder feedback to expand impact</td>
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<td>Regularly analyzes and interprets data to identify key lessons</td>
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<td>Regularly scans for trends relevant to organizational mission and services</td>
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<td>Produces sustainable results</td>
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<td>Offers services that reliably and demonstrably build community strengths and assets</td>
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<td>Promotes systemic solutions to development challenges on an ongoing basis</td>
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<td>Regularly co-designs solutions grounded in local assets and ideas</td>
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<td>Periodically assesses current practices against quality standards</td>
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<td>Routinely assesses results against established targets</td>
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**Legend**
- **Practice Priority**
  - High (1)
  - Medium (2)
  - Low (3)
- **Practice Rating**
  - Challenge (1)
  - Asset (2)
  - Strength (3)
- **Urgency**
  - Needs work urgently
  - Work on this would be nice but not necessary
  - Work not needed now
- **Driver Rating**
  - Driver supports strong performance
  - Driver inhibits strong performance
  - Empty cell: driver exerts little influence (positive or negative on performance)
Monitoring and Evidence

**A broad understanding of evidence: anything that can support a “claim of quality” (performance scores of 2 or 3).**

An external panel reviews evidence and, as needed, adjusts performance scores.

**Definitions:**
- **Relevance** = Evidence presented is directly linked to the domain and practice and is not more than 18 months old (except under special circumstances)
- **Sufficiency** = The quantity and scope of the evidence presented is sufficient to draw conclusions about the degree to which the domain and dimension under consideration fulfill the criteria delineated in the rubric.
- **Detail adequacy** = The evidence presented has enough specificity about what, when, where, and how to support the internal assessment team’s rating.

**Scoring Scale:**
- 2 = The evidence completely supports the rating assigned by internal assessment team.
- 1 = The evidence partially supports the rating assigned by internal assessment team.
- 0 = The evidence does not support the rating assigned by internal assessment team in any way.
- NE = No evidence provided (in the case of “Developing” ratings)

**NOTE:** The internal assessment team does not need to provide evidence to justify a rating of “Developing.” Evidence is only required to support ratings of “Accomplished” and “Exemplary.” Use the comments section of the scoresheet to explain ratings of “Developing.”

**RESULTS CALCULATION:** If the total evidence score reported in the last column is...
- 3 or 4 - the internal assessment team’s rating will be accepted
- 2 - the internal assessment team’s rating will be accepted with reservation
- 0-1 - the rating should automatically be changed to a “challenge”
What Does the Process Look Like?

**PREPARATION**
- Assemble the team
- Articulate an organizational vision

**MAPPING**
- Score practices by strength and priority
- ID Practices that NEED attention
- Score adequacy of performance drivers
- Analyze patterns to find leverage points

**STRENGTHENING and MONITORING**
- Monitor changes in drivers
  - Develop a 100-day plan
  - Present evidence for performance claims
- Harvest learning
- Validate evidence

**EVALUATION**
- Reassess practices for change
- Draw conclusions on progress (or not) and causes
Information for Interested Users

• **Piloted for proof of concept** – estimated timings were accurate; mapping and analysis templates were understood; users found the experience to be of value.

• **Facilitator’s Guide** being finalized.

• **Virtual training** will be conducted in late September.

• **Next year** the CMMS will be adapted for a different stakeholder group, e.g., clinic or government department.
Strengthening capacity in Nigeria with D4I’s RECAP

Samson B. Adebayo, MSc, PhD
Data Research and Mapping Consult, Ltd.
How does RECAP support D4I and other organizations?

The Research and Evaluation Capacity Assessment Tool and Resource Package supports organizations to assess technical and management capacity for conducting research and evaluations.

RECAP users create actionable plans for institutional strengthening.

Designed to strengthen country and organizational capacity to address local health information gaps and to receive direct awards from USAID and other funders.
The DRMC example

Data Research and Mapping Consult, Ltd. (DRMC) is a Nigeria-based research organization.

D4I and DRMC partnered to co-implement a large-scale evaluation of USAID-funded activities in Nigeria.

DRMC used RECAP to identify organizational priorities for capacity strengthening.
Pilot: Highlight of Assessment Results with DRMC

Domain 5: Information Sharing

5.1 Translation – Interpretation
“Before there was no qualitative! We need to learn it!”

5.1 Translation – Gender Integration
“Most of the time we do this, but really depends on what the client wants. Always keep option to integrate the gender divide in our analysis, especially in our recommendations. But we must follow what the client wants, we cannot add questions to their instruments.”

5.2 Dissemination – Writing
“As individuals we have done a lot, but as [organization] we have not done most of these things [e.g., journal articles, conference presentations, development blogs] and there is a need to move further.”
Institutional Strengthening Framework

Review results in Excel workbook
- Highlights from assessment dashboard
- Notes and evidence text data for deeper context

Prioritize needs
- Capacity gap prioritization
- Funding
- Strategic positioning
- Staff professional development
- Feasibility

Design the plan
- Define strategic responses using the workbook
- Use RECAP Resource Guide to identify free/low-cost opportunities by subdomain

Follow-up actions
- Define roles and responsibilities
- Timeline
- Monitoring
Approach, process, and outputs

**Approach**

- **Learning through action:**
  - Integrating training during every stage of the evaluation process
  - Collaboratively engaging in actual evaluation activities.
- D4I provides ad-hoc support and engages in capacity-building activities as needs arise.

**Data collection**
- Collaborative review of data collection processes and tools
- Tailored training on data collection and field testing qualitative methods

**Data analysis**
- In-person qualitative analysis training
- Collaborative development of codebooks and co-coding of qualitative data
- Virtual training sessions on thematic analysis and memo writing

**Dissemination**
- Coaching for memo/report writing
- Joint development of presentations for stakeholders and partners
- Joint presentations of findings
## Facilitators and challenges

**Facilitators**
- Use of a participatory tool to drive change (RECAP)
- Application of an integrated approach
- Adoption of a system perspective

**Challenges**
- Competing interests in activity timelines
- Challenges related to long-distance collaboration
- Measuring performance is more difficult than assessing latent capacity

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**Facilitators**

…the contacts I had with the D4I have greatly enhanced my research capabilities. Specifically, I have learned more about qualitative data collection methodology… My skills on thematic analysis of qualitative data were also significantly improved. Moreover,… for the first time, I was introduced to and mastered the Most Significant Change methodology.” – DRMC Researcher

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**Challenges**

“Our partnership with D4I will surely impact positively on our future work especially to someone like me who still pursues research work. With the theoretical and practical knowledge acquired, we will now be able to carry out qualitative studies in a better way (in research design, data collection and analysis).” – DRMC Researcher

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*Source:* Access the brief [Strengthening Capacity in Nigeria: A Case Study](#) on D4I website to learn more about our capacity-building efforts in Nigeria.
How to Access RECAP

The RECAP package is available on the D4I website.

A webinar held on June 2022 provides more information on how to use the RECAP tool.

RECAP URL: https://www.data4impactproject.org/publications/recap/
Q&A with Panel
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