



# PRACTICAL STEPS TO ADVANCE LOCALLY LED EVALUATION

Stakeholders working to advance a locally led evaluation agenda in humanitarian contexts should consider several enablers (what has worked), barriers (major challenges blocking the way) and practical solutions. In this section, we draw together the reflections from our discussions with evaluation stakeholders to outline **practical steps**. These steps do not form an exhaustive list of what can be done to advance locally led evaluations, they do not need to be followed in a fixed order, and they might not be applicable in every context. However, they can be used as a starting or continuation point to inspire action.

The practical steps are divided into **long-term strategies for the overall evaluation function** (LTS) and more **immediate actions for ongoing or upcoming evaluations**. LTS are grouped under three topics:

-  **Shaping evaluation culture, policies and strategies;**
-  **Developing know-how;**
-  **Establishing and maintaining critical relationships.**

There may be opportunities to use strategies in parallel or across overlapping time periods. Immediate actions are linked to the phases of an evaluation: Planning, Implementation, Dissemination and Use. When working with a community, it is important to decide with them what they consider 'locally led' at every stage.

Points for consideration are offered to three stakeholder groups: 1) Evaluators (with further considerations based on their level of connection to the community); 2) Commissioners, donors, funders and evaluation managers (all grouped as commissioners for simplicity); and 3) Communities (which may include local actors or partners). Stakeholders can start by familiarising themselves with the principles presented in [Section 1](#), and by being open to the potential value that promoting, supporting or undertaking locally led evaluation will bring. From here, stakeholders can select steps according to what is appropriate to their contexts and within their influence or control.

For example, staff from Christian Aid described a clear activity within their MEAL department's control: piloting participatory methods in specific settings where country offices and partners have the capacity and interest to do so (immediate action). This is mostly when working with flexible institutional funding and is informed by a wider and ongoing organisation-wide reflection and commitment to localisation and decolonising evaluation (LTS). Another key informant suggested that once localisation is prioritised at the top, the subsequent trickle-down effect should lead to the development of a localisation strategy and an implementation plan, which then triggers stakeholders to take action and to make changes that will improve localisation in monitoring and evaluation (M&E).

The steps are still relevant and applicable for organisations and stakeholders where broader localisation or locally led humanitarian action strategies do not exist or are in their infancy. This can mean starting with an immediate action that fits best within existing ways of working, or it can mean reflection at an individual or collective level. Attention should be paid to how applying these actions will affect the way that evaluations are planned and conducted, and to what power-sharing with communities and local actors will look like. For example, time may be needed to decide on personal values in relation to locally led work, before they are used as a foundation to guide how an individual applies for and accepts evaluation assignments.

## LONGER-TERM STRATEGIES (LTS)



### 1. SHAPING EVALUATION CULTURE, POLICIES AND STRATEGIES

Actions relate to strategic commitments, evaluation policies and funding that align with the principles of locally led evaluation.

#### A. Make a strategic commitment to locally led evaluations

Main principle applied: Self-reflection and reflexivity 



'Start building institutional awareness and understanding about the value of localising M&E approaches with organisations you work with as a first step towards cultural change of institutions to accepting and adopting these localised approaches.'

~ Kathryn Dinn, Independent Consultant, Australia 

**Commissioners and evaluators** can set aside time with leadership to discuss and align strategy on localisation or locally led humanitarian action (where these exist) with the conceptual framework outlined in [Section I](#).

Strategic commitments can include:

- Advocating for evaluations to be intentionally designed to prioritise opportunities for learning at a local level and to minimise the reporting and compliance requirements of humanitarian programming.
- Committing to leverage the experiences and insights of local communities, evaluators, enumerators and staff who are familiar with the relevant cultural and social context.
- Envisioning leadership and visible roles for local evaluators, researchers and civil society partners throughout the evaluation cycle and avoiding tokenistic participation that is limited to answering pre-defined questions or to involvement only after design and criteria are set.
- Setting key performance indicators and targets to track progress on meeting locally led evaluation goals. For example: conducting evaluations with local evaluation experts, conducting listening tours to inform activity design, and implementing participatory monitoring, evaluation and learning.

Starting the conversation: Consider the 'big E' in M&E, namely independent external evaluations, but also the 'small e' where organisations and donors can discuss resources for rapid reviews or learning-focused evaluations. Here, communities can be part of the decision-making around the focus of the evaluation and can devise the questions that they want answered.



“I think maybe it’s in terms of starting the conversation, maybe it’s even starting small, like... in monitoring and evaluation, there’s the big E, which is your big independent external evaluations and your small E and (...) then this is where organizations have an opportunity to have a conversation with your donor and influence that and say: “look, we would like to do a rapid review or a learning-focused evaluation of some assistance we just provided to ‘x’ community. Can you give us approval to use the resources so that the community is also part of the evaluation?” Not in that we are collecting data from them but as in they are part of the decision-making around what should be the focus of the evaluation and what are some of the questions that are important to them that they want answered.”

~ Key informant



**Local evaluators** can spend time understanding the evaluation landscape in their contexts. For example, they can explore who commissions evaluations, for what purpose, and through which channels. Additionally, evaluators can connect to relevant networks (see [LTS 3.A](#)) to put themselves in a stronger position to apply for and lead evaluation initiatives.

**Communities** can elect local champions and representatives who can voice their collective concerns and facilitate participation at various stages of an evaluation.

## B. Adapt evaluation policies and practice (regulations, purpose, criteria, quality, recruitment)

Main principle applied: Local leadership and ownership



**Commissioners** can build flexibility into their respective evaluation policies, adjusting strict requirements on type of methodology, fixed evaluation criteria, quality and rigour standards, and recruitment guidelines that undermine locally led evaluation.

Adaptation efforts can include:

- Considering how to work in ways that are compatible with locally led evaluation (see, for example, Paul and David, 2024).
- Requiring that each evaluation commissioned justifies how findings will produce value for local communities. For example, insert into policies that, at a minimum, a component should respond to community-driven questions, and that local stakeholders including community members influence evaluation priorities and data needs.
- Examining and adjusting recruitment policies, protocols and terms of reference (ToR) to remove limiting factors for local evaluators. For example, remove requirements for: international experience, a strong command of English and familiarity with approaches or methodologies that are not applicable to the context, unless these requirements are critical to the assignment.
- Ensuring that procurement policies do not favour the same (often international) experts through pre-established connections and ways of working, even when

they are not the most contextually appropriate choice. For example, re-assess the evaluation professionals in existing procurement systems and expand consultant rosters to include local evaluators/firms for all locations where this is possible (see USAID, 2023b).

- Sharing relevant policies and good practice publicly, including examples of locally led evaluations through platforms such as ALNAP's [HELP Library](#).<sup>9</sup>

**Local evaluators, partners and communities** can push back against evaluators and evaluation processes that do not respect local culture and context, and/or do not give community members the opportunity to be involved, influence or lead, where appropriate. They can also utilise feedback and complaints mechanisms to offer insights and in some cases gain insights on evaluation functions.

## C. Provide funding

Main principle applied: Self-reflection and reflexivity 

**Commissioners** can ensure that the necessary budget and time is allocated to hire local evaluators/teams, engage with communities and conduct evaluations with a local lens. This should be given careful consideration, especially if (Global South) local actors and communities are to be engaged more meaningfully in all phases of an evaluation.

Providing adequate funding can include:

- At a minimum, ensuring that dissemination activities that reach communities are built into evaluation plans and are funded.
- Self-reflecting on and addressing any blockages (and the root causes) to providing funding. It is important to recognise that lack of access or lack of allocated resources may in fact be driven by underlying cultural or racial biases, for example, as part of wider discriminatory systems.




**“If you don’t address that power dynamics from the very beginning, acknowledging who needs to be first instead of just putting some justifications like lack of resources, lack of access, etc. In reality, there is lack of resources because that’s underpinning discrimination and racism, and because nobody really thought at the beginning how to address that discriminatory system from the start.”**

~ Cecilia Milesi, [Global Change Center](#) 


- Re-assessing existing procurement mechanisms and internal resources to support locally led evaluations. Equally, reflect on the resources needed internally for commissioning parties to support these processes. Barriers of entry exist for local actors (such as language, capacity, familiarity with application requirements, etc.) that make it difficult for local actors to lead

<sup>9</sup> <https://library.alnap.org/help-library>

commissioned evaluations. Commissioners should work to remove or reduce these barriers while also ensuring a supportive internal structure for local actors to draw on when leading evaluations.

 “We are very supportive of increasing opportunities for local actors to lead evaluations... there are some innate barriers of entry for local actors (such as language, capacity, familiarity with our application requirements, etc.) that currently make it difficult for local actors to lead our commissioned evaluations so we need to brainstorm how to simultaneously lower these barriers while ensuring that we have the necessary supportive internal infrastructure that will allow local actors to succeed in this endeavour.”

~ Key informant 

 “...if you take it seriously, you need to have three interventions with the community, one at ToR stage, one during data collection and then one during validation... Which evaluations will budget for that? That is a really important question. And you can’t really say you’re doing decolonial evaluations or decolonial MEL if you cannot fund it. ...That limits how many of our programs and projects can actually apply decolonial approaches.”

~ Alix Tiernan, Christian Aid 

- The planning and setting aside of flexible institutional funding that can be used independently to conduct locally led evaluations, including at the ToR stage, during data collection and during validation.

**Evaluators** can position themselves to better access funding by:

- Taking time to understand commissioners’ processes and policies, and to look for opportunities for locally led work.
- Advocating for adequate and appropriate funding through their communications with commissioners. Emphasise (at the application stage) what funding needs to look like to form locally led evaluation teams, to apply context-appropriate approaches and methodologies (see [LTS 2.A](#)), and to nurture critical relationships (see [LTS 3.A](#)).
- Maintaining an open dialogue with commissioners throughout evaluation processes to discuss, negotiate and adapt partnership terms along with organisational expectations and obligations (e.g., related to due diligence, contract terms, sub-award processes, etc.).
- Seeking out funding for community-led approaches. Examples include the Start Network’s smaller grant mechanisms for learning and organisational growth through the Start Fund, and some evaluation associations (see [LTS 3](#)).



## 2. DEVELOPING KNOW-HOW

Actions address the knowledge, skills and ways of communicating that can contribute to implementing locally led evaluations.

### A. Apply appropriate evaluation design


(approaches, criteria, methodologies and tools) for locally led evaluations

**Main principle applied: Local knowledge systems and ways of knowing** 

**Commissioners and evaluators** can invest in their own understanding and acceptance of locally led evaluation design. This should not be limited to popular participatory approaches, which can sometimes reinforce power structures and be used in a tokenistic way.

Understanding and accepting locally led evaluation can include:

- Ensuring local communities are involved in the design, implementation and dissemination of evaluations so their perspectives and needs are addressed. For example, consult with communities to identify the top three questions that they would like included in an evaluation.

 **“For CSOs and NGOs, for example, what process can they invest in to get perspectives from communities so that when they have the conversation with the donor, they’re saying, look, these are the top three questions that we would like to include in evaluation and we have identified these questions based on a community consultation, for example.”**

~ Key informant 

- Providing a space for co-creation of contextualised evaluation criteria and indicators, where project participants openly explore what they see as important and how they understand change.
- Contributing to and building evidence bases for evaluators to access, learn from and build their own skills. This can also give visibility to and provide advocacy material for locally led evaluation design.
- Adapting approaches to data collection for hard-to-reach areas with consideration given for the most contextually appropriate remote modalities (see [resource page](#)).<sup>10</sup>
- Documenting, sharing and promoting community-led MEAL approaches, methodologies and tools (see Start Network, 2023; Sloan, 2024).

**Communities** can communicate traditional ways of knowing and ways of assessing the value of programmes that are best suited to their local context.

<sup>10</sup> <https://www.betterevaluation.org/methods-approaches/themes/monitoring-evaluation-fragile-conflict-affected-violent-settings>

## B. Using appropriate language and communication styles

Main principle applied: Local leadership and ownership 

**Commissioners and evaluators** can ensure, at a minimum, that they are using language and communication styles that are known, understood and accepted by local stakeholders.

This can include:

- Hiring evaluators and team members with knowledge of local languages, as well as context and culturally appropriate communication styles.
- Using plain and accessible language, and avoiding the use of humanitarian-specific jargon and terminology.
- Removing English language skills as a recruitment requirement, and as an expectation for most forms of communication in the sector and in the development of guidance and tools. Given the extent of technology available, particularly to commissioners, there is no reason for English to dominate evaluation practice. The burden of understanding or translating outputs that are not written in English should be placed on non-local stakeholders.
- Accepting terminology that is proposed at local level, without censoring or changing the chosen words and meaning.

**Communities** can request that interactions with them during evaluation processes are held in the language within which they feel most comfortable expressing themselves.

## C. Mutual learning and capacity strengthening

Main principle applied: Local knowledge systems and ways of knowing 

**Commissioners** can strengthen their own capacities by learning about locally led evaluation relevant to the contexts within which they commission evaluations. They can also support evaluators in capacity strengthening by:

- Providing opportunities for local evaluators to lead and fulfil substantive roles in evaluation teams.
- Investing in capacity as part of the commissioning process. Initial time and resource investments to work with local evaluators can yield high returns, both in terms of consistently high-quality evaluations plus overall cost savings because evaluators are located in-country and may offer fairer rates.
- Creating mixed (local and international) teams with broad expertise and an emphasis on two-way mentorship to address gaps in local knowledge and skills.
- Familiarising themselves with existing local practices that can be used for evaluation, including context-appropriate participatory approaches and context-specific examples of community- or partner-led M&E.

- Funding research and learning initiatives related to locally led evaluation. Initiatives can enable local evaluators to develop context-specific methodologies and tools, as part of commissioned evaluations.
- Including tailored capacity strengthening for local young and emerging evaluators or local actors (partner staff or community members) to participate in any component of an evaluation, with remuneration for their time and effort.

**Local evaluators** can invest in strengthening capacities that will make them competitive and visible to evaluation commissioners. This can include:

- Learning and teaching peers how to develop and submit competitive bids and proposals.
- Improving and promoting their writing and management capacities to get authorship and leadership roles within evaluation teams.
- Using artificial intelligence (AI) and other technology to support any skills gaps, including for data analysis, writing and translations.

**Communities** can familiarise themselves with evaluation processes by asking questions and seeking information from evaluators as well as programme/project teams. This knowledge will place communities in a better position to influence and lead various aspects of the evaluation process (see Cram, 2021).



### 3. ESTABLISHING AND MAINTAINING CRITICAL RELATIONSHIPS

Actions enable trust-building and knowledge sharing and provide avenues for meaningful participation through the relationships developed between communities, local actors and the wider evaluation ecosystem.

#### A. Community/local actors

Main principle applied: Justice and equity 

**Commissioners** can contribute to strengthening these critical relationships by:

- Building relationships ahead of an emergency (not just as a consequence), and by selecting evaluators with pre-established connections with local actors and communities who can lead or play a major role in evaluations.



**“Don’t use the emergency as an excuse to revert to defaults. We’ve seen really good examples of building relationships before an emergency and that takes time. So very much the same with localization.”**

~ Pamela Combinido, Humanitarian Advisory Group (HAG) 

- Allocating resources to and building in the requirement for evaluators to spend time establishing or strengthening connections with local actors and communities who will participate in an evaluation.

- Moving away from conventional practices where they (as international stakeholders) control programme design and proposed solutions to creating space for local actors to lead aspects of the evaluation process can result in more effective and relevant outcomes.

 “Embracing an approach free from preconceived notions about aid and philanthropy is essential for building equitable partnerships. This means being open to learning from local communities and allowing them to lead the way. It’s crucial to move away from conventional practices where international intermediaries dominate program design, timelines, and solutions. Instead, creating space for local partners to lead fosters more effective and relevant outcomes.”

~ Michael Vincent Mercado,  
Center for Disaster Preparedness Foundation, Philippines



**Evaluators** can form strong relationships or work with team members who have lived experience and existing relationships with communities in relevant contexts.

**Communities** can ask evaluators how much they know about their community and context, and can hold evaluators to account to uphold the learning and interests of the community in the evaluation findings (see Cram, 2021). Where communities are not involved in an evaluation by design, they can ask to participate. Equally, they can refuse to participate where evaluators do not commit to sharing their findings or where the evaluation does not provide learning relevant to the community.

## B. Strategic collaborations within the evaluation ecosystem (academic, civil society, evaluation associations, local authorities, etc.)

Main principle applied: Justice and equity 

**Commissioners** can contribute to local evaluation ecosystems by:

- Supporting the development of National Evaluation Policies (at government level) that aim to strengthen local capacities and competencies in evaluation.
- Sending calls for proposals directly to national and regional evaluation associations.
- Forming relationships with evaluation networks in-country and maintaining open communication to discuss opportunities, align expectations around quality and strengthen capacity.
- Funding evaluation network initiatives, where possible.

**Evaluators** often work in silos, but they can also form or participate in professional networks that contribute to greater coordination, knowledge sharing and leveraging of local expertise. Evaluators can capitalise on strategic collaborations by:

- Participating and investing time in national evaluation associations to raise

their visibility and increase their access to commissioners' calls for proposals. VOPEs can also create opportunities for diaspora or international stakeholders to connect and work with local evaluators (see [VOPE Directory](#))<sup>11</sup>. They have useful resources available. One example is the Ukrainian Evaluation Association's M&E Glossary, plus other evaluation resources in Ukrainian.<sup>12</sup>

- Participating in evaluation communities of practice and conferences, known as Voluntary Organisations for Professionalisation of Evaluation (VOPEs), that support research and learning on locally led evaluation (e.g., [the African Evaluation Association](#), [EvalMENA](#) and [EvalYouth](#)).<sup>13</sup> These associations sometimes provide related grants (for an example, see APEA, 2024).
- Advocating for local evaluators to lead evaluations commissioned in-country.
- Building the capacity of other national evaluators where possible. Shadow or mentor other evaluators according to level and expertise, particularly in evaluation approaches and methodologies that are culturally/contextually relevant and accepted by communities.
- Connecting to academia, government entities, civil society, the private sector and other evaluators through platforms like LinkedIn. For example, [EvalYemen](#)'s<sup>14</sup> multi-stakeholder approach has helped mobilise local resources and expertise to address various challenges.
- Building a public list of local evaluators with focus areas, which commissioners can access when seeking certain expertise.



**"Your network is your net worth."**

~ Key informant



11 <https://ioce.net/vopes/vope-directory/>

12 <https://www.ukreval.org/en/%D0%B1%D1%96%D0%B1%D0%BB%D1%96%D0%BE%D1%82%D0%B5%D0%BA%D0%B0>

13 See <https://afrea.org/>, <http://evalmena.org/> and <https://evalyouth.org/>

14 <https://evalyemen.org/>

