



Capacity Checklist

Here is a simple checklist to help you determine your readiness to undertake an evaluation. While it may seem daunting to have all these factors in place before you start, not everything on this list is essential. Some factors are more important than others in terms of readiness. The checklist outlines what you ‘need to have’ and what is ‘nice to have.’ Taking stock of your readiness allows you to customize your evaluation plan in a way that works for you.

1. People

Having someone in place to lead the evaluation is a critical factor in determining your readiness to move forward.

2. Time

Allocating time for evaluation work in staff work plans and/or team planning allows for preparation and helps mitigate a situation where workloads may become unmanageable.

3. Funds and Other Resources

Conducting an evaluation will require some allocation of funds and other resources. Preparing for these costs can make your plans concrete and alleviate budget constraints further into the project.

4. Leadership and Supporting Change

Buy-in from managers, team leaders and funders will ensure evaluation work is given priority and can drive future service improvements.



1. People

Having someone in place to lead the evaluation is a critical factor in determining your readiness to move forward.

Need to Have	✓ In Place	Not in place, but we will address it by:
1.1 Is there someone who can lead the evaluation work?		
1.2 Does the person who leads this work have time to coordinate what needs to be done or adjust workload in order to do so?		
1.3 Do you have someone who can analyze the data and produce relevant reports or knowledge exchange and transfer products coming out of the evaluation?		
Nice to Have	✓ In Place	Not in place, but we will address it by:
1.4 Does the lead person have experience in evaluation work, OR can they access webinars, tutorials or engage in other learning to get things moving on the evaluation planning?		
1.5 Is there a possibility of hiring an external evaluator?		
1.6 Are there evaluation experts in your network or on your campus that can support your process?		

✓ **QUICK TIP:** *Is there a graduate research and evaluation program on your campus where you may be able to find students who can support your analysis or data collection work in exchange for practical experience that they may add to their resume?*

See also tips in 3 (Funds & Other Resources)



2. Time

Allocating time for evaluation work in staff work plans and/or team planning allows for preparation and helps mitigate a situation where workloads may become unmanageable.

Need to Have	✓ In Place	Not in place, but we will address it by:
2.1 Is there a timeline for your evaluation activities?		
2.2 Do the staff have time to complete evaluation activities?		
2.3 Have the expected time commitments for any people supporting your evaluation work been communicated to them?		
Nice to Have	✓ In Place	Not in place, but we will address it by:
2.4 Is there some time at regular staff meetings that can be dedicated to an update of the evaluation work?		

- ✓ **QUICK TIP:** Consider planning your evaluation during the summer months when student services may not be as busy to avoid demanding workloads.



3. Funds and Other Resources

Conducting an evaluation will require some allocation of funds and other resources. Preparing for these costs can make your plans concrete and alleviate budget constraints further into the project.

Need to Have	✓ In Place	Not in place, but we will address it by:
3.1 Is there any internal funding that can be dedicated to evaluation? What amount?		
3.2 Is there any external funding that can be dedicated to evaluation? What amount?		
Nice to Have	✓ In Place	Not in place, but we will address it by:
3.3 Do you have access to any software or data infrastructure on your campus that can help you analyze data?		
3.4 Are there in-kind supports that can be accessed?		

- ✓ **QUICK TIP:** Some evaluation consultants or experts offer their services pro bono for select groups every year; consider researching some experts to potentially access in-kind supports
See also tips in 1 (People)



4. Leadership and Supporting Change

Buy-in from managers, team leaders and funders will ensure evaluation work is given priority and can drive future service improvements.

Need to Have	✓ In Place	Not in place, but we will address it by:
4.1 Are the decision-makers or leaders at your Centre or your department ready to support you to do evaluation?		
4.2 Is there a practice of learning from your work, or making improvements based on these learnings within your team?		
4.3 Is there value placed on evidence-based planning by your team's leadership and/or decision-makers?		
Nice to Have	✓ In Place	Not in place, but we will address it by:
4.4 Can decision-makers connect you with potential partners who can support your evaluation work? Are there any student leaders or others who can help you do this.		
4.5 Is there opportunity to conduct some team learning around evaluation through a staff workshop?		

- ✓ **QUICK TIP:** *There are many short online tutorials and talks about evaluation, its benefits and about the importance of basing service decisions on evidence, perhaps finding some links and sharing these with your team will help get buy-in (hint! Check out our website, www.campusmentalhealth.ca to start)*
- ✓ **QUICK TIP:** *If your office hosts staff team building sessions, consider dedicating one of these to learning about evaluation work together through interactive exercises and dialogue*