Essential Competencies for Program Evaluators

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Let’s be clear about competencies...
There is a difference between **EVALUATION** and **EVALUATOR**.
Who is in this session today?
Questions to answer

• Where do you currently live?
• How long have you been an evaluator?
• What fields do you work in?
• What is your interest in evaluator competencies? (Why attend this session?)
Agenda for our 2-hour session

1. Identifying competencies intuitively
2. Personal beliefs about evaluator competencies
3. The original decade-old ECPE
4. The status of competencies around the world
5. Assessing your competencies—What next?
People create these things!

IDENTIFYING COMPETENCIES
Identifying competencies intuitively

What are the knowledge, skills and dispositions that a program evaluator needs to successfully complete the evaluation?
Vignette exercise

For your assigned vignette, identify the knowledge, skills, and dispositions/attitudes the evaluator needed to conduct the study
Evaluator “competencies”

<table>
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<tr>
<th>Knowledge</th>
<th>Skills</th>
<th>Attitudes/Dispositions</th>
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Evaluator relationships

• A relationship exists among
  • The evaluator
  • The client
  • Program staff and other evaluation stakeholders

• Primary responsibility for two tasks:
  • Making evaluation decisions
  • Implementing the evaluation
Two basic questions

Who plans the evaluation?

Who conducts it?
Evaluator relationships

• Primary responsibility for making and implementing evaluation decisions may lie
  • With the evaluator
  • With someone else in the setting
  • Jointly with both

• The relationship may shift during the study
Interactive participation quotient (IPQ)

Evaluator Program leaders, staff, community

Evaluator-directed Collaborative Participant-directed

Involvement in decision making and implementation

LOW HIGH

ZONES
What do you believe?

COMPETENCY STATEMENTS
Statement #1

Technical knowledge and skills are the most important category of evaluator competencies.
Statement #2

The competencies that program evaluators need depend in large part on specific evaluation settings.
Statement #3

Professional training in program evaluation is essential to build evaluator competencies.
Question:

To what extent do personal beliefs matter in a discussion of evaluator competencies?
BTW, not everyone thinks professionalization is a good idea

- Negative view of neoliberalism
- Perceived hegemony of dominant players
Presenting... 

THE ORIGINAL ESSENTIAL COMPETENCIES FOR PROGRAM EVALUATORS
Once upon a time. . .

It began with an idea in a graduate course
How were the ECPE developed?

- “What does the literature tell us?”
- A pilot study using the initial set of competencies, *AJE* publication (2001)
- A revision process including a crosswalk
- ECPE published in *AJE* (2005)
- Articles in *CJPE* (2005) and *AJE* (2006)
- CES’s Credentialed Evaluator program
- *CJPE* special issue on evaluator competencies; *New Directions* issue on evaluation professionalization
Essential Competencies for Program Evaluators

- Professional Practice
- Systematic Inquiry
- Project Management
- Interpersonal Competence
- Situational Analysis
- Reflective Practice
1. Professional practice

Fundamental norms and values of evaluation practice

• Applies evaluation standards
• Works ethically
• Respects all stakeholders
• Considers the general and public welfare
• Contributes to the knowledge base
2. Systematic inquiry (1/2)

Technical aspects of evaluation practice

• Understands knowledge base
• Knows quantitative and qualitative methods
• Knows mixed methods
• Conducts literature reviews
• Specifies program theory
• Frames evaluation questions
• Designs the evaluation

PLUS...
2. Systematic inquiry (2/2)

- Collects and interprets data
- Makes judgments and recommendations
- Provides rationales for decisions
- Reports procedures and results
- Notes evaluation strengths and limitations
- Conducts meta-evaluations
3. Situation analysis (1/2)

Unique interests, issues, and contextual circumstances of evaluation

• Describes program
• Determines program evaluability
• Identifies stakeholders’ interests
• Serves intended users’ informational needs
• Addresses conflicts
• Attends to evaluation use

PLUS. . .
3. Situation analysis (2/2)

- Examines organizational and political context
- Attends to organizational change
- Respects site and client uniquenesses
- Remains open to input
- Modifies evaluation as needed
4. Project management (1/2)

“Nuts and bolts” of evaluation work

• Responds to RFPs
• Negotiates with clients
• Writes formal agreements
• Communicates with clients
• Budgets evaluation
• Justifies cost

PLUS...
4. Project management (2/2)

- Identifies needed resources
- Uses technology as appropriate
- Supervises and trains others
- Conducts evaluation in a nondisruptive manner
- Presents work in timely manner
5. Reflective practice

One’s own evaluation expertise and need for growth

• Knows self
• Reflects on practice
• Pursues professional development in both *evaluation* and *content areas*
• Builds professional relationships
6. Interpersonal competence

“People skills” necessary for evaluation practice

• Uses written and verbal/listening communication skills
• Uses negotiation skills
• Uses conflict resolution skills
• Facilitates constructive interpersonal interaction
• Demonstrates cross-cultural competence
References


What recent developments are triggering conversation?

CURRENT STATUS OF COMPETENCIES DEVELOPMENT AND USE AROUND THE WORLD
The pace of competency activity around the world has increased rapidly.
Some competency applications

1. Canada’s Credentialed Evaluator (CE) program
2. AEA’s Credentialing Task Force (2015)
3. Aotearoa New Zealand (cultural focus)
4. South Africa (managerial use)
5. Japan and Thailand (educational evaluators)
6. International Development Evaluation Association (IDEAS)
7. European Evaluation Society- Voluntary Evaluator Peer Review (VEPR)
AES Evaluator’s Professional Learning Competency Framework domains of competence

1. Evaluative Attitude and Professional Practice
2. Evaluation Theory
3. Culture, Stakeholders and Context
4. Research Methods and Systematic Inquiry
5. Project Management
6. Interpersonal Skills
7. Evaluation Activities
Distinctions among terms

- Knowledge, skills, attitudes/dispositions
- Competencies
- Competence
## Definitions

<table>
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<tr>
<th>Term</th>
<th>Meaning</th>
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<tr>
<td>Knowledge, skills, attitudes/dispositions</td>
<td>From curriculum and training fields- What you know, can do, and your affect</td>
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<tr>
<td>Competencies</td>
<td>A “set of related knowledge, skills, and attitudes that enable an individual to effectively perform the activities of a given occupation or job function to the standards expected in employment” (Richey, Fields, &amp; Foxon, 2001, p. 31)</td>
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<td>Competence</td>
<td>“Habitual and judicious use of communication, knowledge, technical skills, clinical reasoning, emotions, values and reflection in daily practice for the benefit of the individual and community being served” (Epstein &amp; Hundert, 2002, p. 226)</td>
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Issues to consider

**Conceptual**
- Validity evidence exists
- Importance of context (Wilcox, 2012 study)
- Relationship to improved practice?

**Practical**
- People are using competencies, regardless
- Need to update existing sets
Possible next steps- Practically

• Update existing competencies
• Create professional learning communities?
• Explore credentialing options—or not?
Possible next steps- Conceptually

• Create a formal approach to developing and validating competencies
• Teach evaluation using the competencies
• Study the effect and effectiveness of competencies in a variety of settings
Let’s think about the ECPE together

APPLYING THE COMPETENCIES
Exercise/discussion

1. Which competency categories (or individual competencies) apply across all IPQ zones?

2. Which will work differently depending on the zone? (Please explain)
What’s next for you?

SELF-ASSESSMENT
ECPE self-assessment (What?)

Reflecting on your own practice, how do you rate your current knowledge, skills, and dispositions to effectively carry out program evaluations?
ECPE rating scale

Entry / Novice | Proficient / Skilled | Mastery / Expert
ECPE self-assessment (So what?)

- Learned?
- Affirmed?
- Challenged?
Now what?

What is your professional development plan?
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