



Canadian Evaluation Society
Société canadienne d'évaluation

Evaluator Competencies: a Cornerstone of the CES' Professional Designation Program

Keiko Kuji-Shikatani and Benoît Gauthier, Credentialed Evaluators
Presentation to the American Evaluation Association Conference, Denver, Colorado
October 16, 2014

Development of Competencies for Canadian Evaluation Practice



2006

2007

2008

2009



RFP issued

Consortium
Report

Project Volunteers

- Sub Committees

CE Model developed

- Council review
- Member Consultations

Consortium
engaged

National Council
Response

Ethics & Standards

Competencies

- Crosswalk
- Member survey
- Descriptors

Competencies

- Validation survey

Member
Consultations

Competencies approved

Decision to
proceed

Credentialed Evaluator
definition

PD Policy approved

- New CES program/service
- CES structure changes

Prof. Desig. Core
Committee
established

Implementation plan

- CES investment

Crosswalk of Evaluator Competencies

- *A well-structured and agreed knowledge base is essential to any system of professional designation*
- Professional Designation Core Committee tasked to conduct a Crosswalk of Evaluator Competencies
 - Taxonomy of Essential Competencies for Program Evaluators – ECPE (Stevahn, King, Ghre and Minnema, 2005)
 - CES Essential Skills Series
 - CES Core Body of Knowledge study
 - Treasury Board Secretariat Competencies for Evaluators in the Government of Canada
 - Joint Committee Program Evaluation Standards
 - AEA's Guiding Principles
 - Competencies for Evaluators in the United Nations System
- Informed the development of the CES Competencies for Canadian Evaluation Practice. (CCEP)

Crosswalk: http://evaluationcanada.ca/distribution/20080312_ces_professional_designation_core_committee.pdf

Competencies for Canadian Evaluation Practice

- **Reflective practice domain** (7) fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth
- **Technical practice domain** (16) specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting
- **Situational practice domain** (9) application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied
- **Management practice domain** (7) process of managing a project / evaluation, such as budgeting, coordinating resources and supervising
- **Interpersonal practice domain** (10) people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity

CCEP: http://www.evaluationcanada.ca/txt/2_competencies_cdn_evaluation_practice.pdf

Use of the Competency Framework

- Professional Designations program (PDP)
 - Credentialed Evaluator (CE) designation
- Professional development event planning
 - intermediate level training series
 - conference workshops
 - webinars
- Personal use by evaluators
 - consideration in training program development

Within PDP

- Competencies = one of three criteria
- Assessed in two ways
 - regular process
 - 150-word substantiations of competence based on descriptors
 - one for each of 49 competencies (70%)
 - importance of examples
 - fast track process
 - substantiation of mastery at the domain level
 - based on one substantial evaluation project

Assessment Reliability

- Assessment of competence performed by a Credentialing Board
- Initial calibration of judgments through examples and discussions
- Still appetite for more calibration
- Inter-rater reliability high: 90% of initial decisions agree

Pros and Cons

Regular process

- Pros
 - detailed account of candidate background
 - disciplined and structured
- Cons
 - cumbersome to produce and to assess
 - can feel like a creative writing exercise

Fast Track process

- Pros
 - respectful of the complexity of competence
 - less burdensome
- Cons
 - applicable only for more seasoned professionals
 - very high level: must be used in conjunction with a detailed cv



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Christine Frank, Credentialed Evaluator

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Competencies are Learning Tools

- Intended for learning
 - Inform professional development activities
 - Guide education in colleges and universities
 - Guide individual professional development
 - Inform evaluation users

Development of Descriptors

- Sub-committee of experienced evaluators
- Each worked on sections
- Reviewed all internally

Our Criteria for Descriptors

- Clarity - Can the descriptor be understood and interpreted reliably?
- Feasibility - Can the descriptor be implemented in various contexts?
- Behavioral language - Does the descriptor say what is to be done rather than what is understood or known?
- Actionable - Does the descriptor indicate action by beginning with a verb?
- Succinctness - Does the descriptor briefly distill the essence of the criterion?
- Consistency of format - Are all descriptors written in the same format?

Example Competency and Descriptors

- 3.5 Serves the information needs of intended users
 - 1) Assess the communication styles of the stakeholders
 - 2) Develop a communication plan that meets the needs of the intended users and the evaluator
 - 3) Develop language that is appropriate for the intended users
 - 4) Develop and disseminate the results of the evaluation to the intended users and to other appropriate stakeholders

Earlier Validation of Competencies

- **Taxonomy of Essential Competencies for Program Evaluators** (Stevahn, King, Ghere, & Minnema, 2005)
 - Used Multi-Attribute Consensus Reaching procedure with 31 participants
 - Consulted with over 100 individuals
- **Consultations on CES version** (Buchanan & Kuji-Shikatani, 2014)
 - Member survey: 99 of the 1500 members responded
 - CES chapters held consultations, reaching roughly 17% of the membership

Validating Competencies and Descriptors

- Showed strong support for the taxonomy as a whole
- Process
 - 17 of 46 invited experts responded
 - Represented many sectors
- Results
 - Competencies in all domains received mostly “appropriate” or “very appropriate” ratings
 - Only five received below 75% “appropriate” and “very appropriate” ratings combined

Ratings of Descriptors

“appropriate” or “very appropriate”

- 27 (14%) received 100%, mostly in the technical practice domain.
- 37 (19%) were in the 90% range.
- 158 (79%) were over 75%.
- 42 (21%) were under 75%.

Learning in the CE Application Process

- Applicants' comments on their learning
- My own learning as a reviewer



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“Writing the narratives challenged me. At some points I was uplifted as I pieced together experience and training. It helped me recognize levels of competence I hadn't taken stock of. At other points I was made aware of areas in which much work was needed. Both of these experiences were gifts.”



“Through the process of completing the CE application, I gained a deeper understanding of and increased confidence in my competence as an evaluator.”



“Completing the application led me to reflect more holistically on all of my education and professional experiences, and how they have shaped who I am as a professional evaluator (not always in conventional ways).”



“As evaluators, we all have such different concerns and practices. It has been very useful to see what others think are important competencies for evaluation practice.”



It has helped me devise a long-term strategy for continuous learning and upgrading.”

“Several of the competencies I can only aspire to. In the simple act of reviewing them, they draw or pull upon you to improve your game.”



- Learned about evaluation in unfamiliar sectors.
- Saw applications for competencies that would never have occurred to me.
- More fully appreciate all competencies.
- Deepened my own practice.



CE Competencies Provide a Training Rubric

Gail V. Barrington, PhD, CMC, CE

1. Highlighting Evaluator Characteristics

As the course begins, nursing students asked why they think they will be good evaluators.

Answers are mapped against the Competencies:

Reflective Practice

- “I am a very big picture thinker and like to see how things fit into the grander scheme.” **(Philip)**

Technical Practice

- “I have an appreciation for the value of high performance standards and functioning in health care. I also possess a natural curiosity for the complexity of why processes succeed or fail.” **(Liz)**

Interpersonal Practice

- “My strong communication skills will help me be a good evaluator; both in collaborating with key people to design an evaluation and then communicating the evaluation information along the way.” **(Karen)**

- Typically **Situational Practice** and **Management Practice** are not well addressed at this early stage.
- At the end of the course, we re-visit the competencies and see if students feel that their skills and competencies have increased.

2. Professional Workshop Planning

Asked to review the “coverage” of workshop abstracts for CES.

Topics were mapped against the Competencies:

- 18 of 30 workshops (60%) were on **Technical Practice** (9 on analysis methods; 6 on logic models)
- A few overlapped with **Situational Practice**
- Very few on **Reflective Practice, Management Practice & Interpersonal Practice**

Recommended that abstracts:

- Use numbering system (1-5) for the domains to simplify an analysis
- Could not determine intensity of topic covered; ask presenter to identify key competencies addressed (up to 3)
- Many abstracts vague; a fear of overselling. Workshop Committee needs to review submission form.

3. Other Developments

- Consortium of Universities for Evaluation Education (CUEE) has as one of its aims to offer credential programs for evaluators wanting to obtain the CE designation
- Essential Skills Series in Evaluation (ESS) has four training modules which are currently being revised. They could be mapped to the CE domains.



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Evaluation
Society

Société
canadienne
d'évaluation

evaluationcanada.ca

secretariat@evaluationcanada.ca

Tel.: 1 855 251-5721

Fax: 613 432-6840

3-247 Barr St.,
Renfrew, ON Canada K7V 1J6