

## INTRODUCTION TO PROFESSIONALIZING EVALUATION: A GLOBAL PERSPECTIVE ON EVALUATOR COMPETENCIES

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To have competencies or not to have competencies? That now seems to be a question for program evaluators and evaluation associations from around the globe. After roughly 50 years, people in a variety of settings are debating whether or not the time has arrived for a formal statement of the unique—or at least distinctive—knowledge, skills, and attitudes required for practitioners of program evaluation. Although program evaluation is a growing practice that has become a recognized field of vocation and study, wide interpretations of what competencies are necessary to guide evaluation practice remain. Commentators have provided many arguments, both positive and negative, surrounding the development, implementation, and potential use of competencies. Some point to the positive potential of the field's coming to agreement on a core set. By contrast, not everyone is enthusiastic about the potential that a declaration of competencies might hold. As a statement by the United Kingdom Evaluation Society (UKES) summarizes,

Some fear that it might provide a stranglehold on what evaluators can do; that it could not cover the variety of competencies needed for different evaluations; and that it might provide commissioners and managers of an evaluation with an inflexible list of competencies that would hold evaluators to account in unhelpful ways. (UKES, 2002, n.p.)

Discussions and debates range from what the competency areas should be and for whom to whether or not there should even be formally established competencies. Evaluator competencies, in different stages of development, are motivated, constrained, and advanced by a complex set of factors. As competencies are being established, the debate often moves to a discussion of who gets to identify and define

the competencies; in other words, who has the power to define who is (and who is not) an evaluator?

The purpose of this special issue of the *Canadian Journal of Program Evaluation* is to draw on diverse experiences from a variety of contexts to document and ground the international discussion of competencies for program evaluators. The issue's structure is purposeful: it first provides conceptual grounding, followed by several case narratives, a response by a thoughtful critic, and a closing article that analyzes the issue's content and then raises questions for the continuing competencies discussion with individual countries, with different sectors, and internationally.

Wilcox and King's opening article grounds the discussion by defining key terms and reviewing the history of competency development in general (i.e., in different fields) and then specifically in evaluation. Their article then discusses the many challenges of professionalizing the field of program evaluation through evaluator competencies. The authors acknowledge that there are no empirical studies linking sets of evaluator competencies to useful or sound evaluations and explain how competency development is affected by a complex set of factors. They also provide a brief look at other sets of competencies not explicitly addressed in the other articles, including those of the International Development Evaluation Association, the United Nations Development Program, and the European Evaluation Association competency frameworks, among others.

Case narratives then present in-depth documentation of experiences in developing evaluator competencies in five settings: Canada, Aotearoa New Zealand, South Africa, Russia, and UNAIDS:

- In the second article Buchanan and Kuji-Shikatani describe the Canadian Evaluation Society's experience, detailing their extensive process to identify evaluator competencies and the ensuing credentialing process. Grounded in the competency work of the US team that developed the Essential Competencies for Program Evaluators, Canada now has a set of competencies that is used by its government and academic institutions. Insights into this process offer details regarding why a credentialing approach was chosen and demonstrate the challenging nature of managing this process.

- The third article shares the details of the Aotearoa New Zealand experience as told by Wehipeihana, Bailey, Davidson, and McKegg. Many consider culture to be a concept that is soft and difficult to define and implement. This case narrative demonstrates culture's powerful practical side. More than any other competency framework reviewed, this case narrative explicitly demonstrates how culture influenced every aspect of the authors' journey to develop a competency framework and the resulting competency framework currently in use.
- The fourth article highlights the development process for evaluator competencies in the South African government. Podems, Goldman, and Jacob begin by briefly describing the historical context in which the need for program evaluators and evaluation skills emerged in government. Rather than examining the more general emergence of competencies across evaluation practice in South Africa, the narrative focuses on the development of competencies in the government sector, where factors came together in a short period to motivate the work.
- Compared with Canada, Aotearoa New Zealand, and South Africa, Russia is in the early stages of grappling with evaluator competencies. In the fifth article Kuzmin and Tsygankov describe the Russian context, which is heavily influenced by Western approaches to evaluation. Unlike in Canada and Aotearoa New Zealand, where the processes were led by national evaluation associations, this Russian process is more diverse. Providing raw insight into the early stages of an emerging process, this case narrative offers a unique perspective. The various roles of the public sector, private sector, civil society, and academic stakeholders demonstrate the often extreme diversity in how powerful stakeholders play a key role in determining who can be, and who is, an evaluator. Moreover, the article shows how this process interplays with defining what evaluation is and what it is not.
- Presenting a sector-specific approach to competency development, the next article switches to a focus on sector-specific evaluator competencies. Fletcher, Peersman, Bertrand, and Rugg share a sector perspective on developing competencies and how that led to the practical use of informing monitoring and evaluation training. Using HIV and AIDS as their focus, this case narrative shows how a UNAIDS-led initiative that involved people from around the world defined core

competencies for monitoring and evaluation (M&E) leadership in the response to HIV/AIDS.

A disclaimer: While these articles document various country and organizational evaluation processes and, where relevant, their competencies, there was not space in this issue to cover all evaluator competencies or competency processes. The selected case narratives document people's experience in developing a set of competencies and explore how political, social, and organizational factors influenced the process that led to the development (or in one case the potential development) and use of evaluator competencies. Bringing these experiences together can inform ongoing discussion on the development of evaluator competencies.

The final two articles include analysis and reflection on the content. The first of these presents commentary from an experienced evaluator grounded in North American evaluation practice. Andy Rowe provides a unique perspective on these articles, having served as the president of the Canadian Evaluation Society. Among other ideas, Rowe highlights his belief that articulating the program logic and mechanisms of how the use of credentials will contribute to improved evaluation would improve future work on competency development.

Podems's final article compares and contrasts the case narratives, exploring the uniqueness and similarities of the cases. This analysis grounds the content in a discussion that explores the potential use and challenges of evaluator competencies within the context of how (and if) to use competencies for four distinct purposes: (a) help practitioners identify as professional evaluators, (b) guide curriculum and training, (c) inform those who hire evaluators, and (d) provide a self-assessment tool for evaluators.

We truly hope that this special issue will contribute to evaluation practice by promoting discussion of the role and value of competencies in professionalizing the field. As noted above—and as is true in many fields—at present there is no empirical evidence that categorically links specific knowledge or skills to the production of useful and credible evaluations. Yet around the world evaluator competencies are being debated, developed, implemented, and used. The history of these competencies, how they were developed, the reasons for their development, and their current use provide insights and lessons that if captured, described, and explored have the potential to ultimately influence evaluation practice around the world.