The Development and Initial Validation of Competencies and Descriptors for Canadian Evaluation Practice

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Abstract: This article presents the Canadian experience of establishing competencies as part of a professional designation project. First we discuss the foundations of the competencies, including the preliminary work of compiling a cross-walk of evaluator competencies, a document that then served as the basis for consultations across Canada. The next steps were to extract five broad themes or competency domains, each containing specific competencies, and to develop descriptors for each competency. A group of Canadian evaluation experts was then asked to rate the competencies and their descriptors. The results of this preliminary validation exercise are highlighted. To conclude, we note how the competencies and their descriptors are currently being used and look ahead to next steps.

Keywords: competency, competency domain, credential, descriptor

Résumé : Cet article présente l’élaboration de compétences dans le cadre d’un projet de titres professionnels au Canada. En premier lieu, l’on discute des fondements des compétences, incluant l’étape préliminaire de compilation d’un référentiel des compétences des évaluateurs, un document ayant ensuite servi de base pour des consultations pancanadiennes. Les prochaines étapes consistaient à identifier cinq thèmes généraux ou domaines de compétences contenant chacun leurs compétences spécifiques, ainsi qu’à élaborer des descripteurs pour chaque compétence. L’on a ensuite demandé à un groupe d’experts évaluateurs canadiens de coter chaque compétence et ses descripteurs. Les résultats de cet exercice préliminaire de validation sont soulignés ici. Pour conclure, l’on note comment on se sert actuellement des compétences et de leurs descripteurs et l’on se penche sur les prochaines étapes.

Mots clés : compétence, domaine de compétence, accréditation, descripteur

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In 2007, the Canadian Evaluation Society (CES) embarked on an ambitious initiative called the Professional Designation Project. This project required, as one of its foundational pieces, a set of competencies for Canadian evaluators. CES saw the refinement of existing lists of competencies and the creation of descriptors as a reflective process that would provide guidance for the evaluation profession and contribute to a continuous monitoring and review of professional parameters and practice. As Eoyang and Berkas (1998) point out, systems do not move inexorably toward an end-point. The intent of developing these descriptors was to provide a base that could be built upon or revised as current knowledge and environments change. As such, the competencies and descriptors are not static and were not developed as end-points. They are meant to be reviewed on a regular basis.

PURPOSE OF THE DEVELOPMENT OF COMPETENCIES FOR CANADIAN EVALUATION PRACTICE

The document CES competencies for Canadian evaluation practice (2010) serves as a pillar for the professional designation instituted in 2009/2010 by CES. However, the competencies also serve other important functions. They provide evaluators with a defined suite of skills and knowledge to strive for in their personal and professional development. They provide educators with guidance on what is important in evaluation education and training. And they provide those who have a need for evaluation services with a view of what they can expect from a professional evaluator. Most importantly, the competencies provide a coherent set of conceptual and pragmatic professional attributes to guide evaluation practice. It should be noted that the evaluator competencies are core attributes and not a comprehensive set of requirements that anticipate and predict all unique contexts and evaluation activities. In addition, other organizations have produced their own lists of competencies, specific to their particular needs and environments. The CES competencies are meant not to supplant these but to provide a generic set applicable in many different contexts.

Given the diversity of the field of evaluation, CES National Council was “cautiously optimistic” that these competencies, subject to validation, would form the basis for a credential and guide decisions about training. The optimism seems well founded as some universities are now using the competencies to help structure courses.

STRUCTURE OF THE CREDENTIALING SUB-COMMITTEE

As National Council moved forward with a system of professional designation for its members in August 2007, the Professional Designation Core Committee (PDCC) was established to facilitate development and implementation. Reporting to the PDCC, the Credentialing Sub-Committee’s mandate was to assist with establishing competencies and also to write and validate descriptors. The membership of the committee fluctuated over the 19 months of work; overall approximately 14 evaluators from most regions of Canada were involved. The members
self-selected and worked as core or associate members. Core members were part of the decision-making process and regularly communicated through teleconferencing. Associate members functioned on an as-needed basis or as their other commitments allowed. All were generous with their time and inputs.

COMPETENCIES

- Competencies are defined as knowledge, skills, experiences, and dispositions of persons belonging to a profession (Stevahn, King, Ghere, & Minnema, 2005). They are used to determine that a professional has the background, knowledge, skills, and disposition to practice the profession safely and effectively (Ghere, Stevahn, King & Minnema, 2006). Competencies may be seen as abilities whose quality can be measured against well-accepted standards. They can be improved through training and experience (Stevahn et al., 2005; Parry, 1996; Gullickson & Howard, 2009; Russ-Eft, Bober, de la Teja, Foxon, & Koszalka, 2008; Huse & McDavid, 2006).

The competencies were developed using the following substructures:

- Cross-walk of existing knowledge to distill current knowledge (Canadian Evaluation Society, 2008)
- CES Competencies for Canadian Evaluation Practice subdivided into domains (Buchanan and Kuji-Shikatani, 2014)
- A document that elaborated and described the competencies (Canadian Evaluation Society Credentialing Sub-Committee, 2010).

COMPETENCIES FOR CANADIAN EVALUATION PRACTICE

Tracing the history of the development and formal use of evaluator competencies, Wilcox and King (2014) highlight the critical importance of a defined taxonomy of competencies to the establishment of a profession. In An Action Plan for the CES with Respect to Professional Standards for Evaluators (Canadian Evaluation Society, 2007), the authors argued for a taxonomy specific to Canadian practice. The Competencies for Canadian Evaluation practice were developed within the Professional Designations Project following an extensive review of the literature. The committee conducted a cross-walk of literature and training programs of several organizations and governments to access existing knowledge (Buchanan and Kuji-Shikatani, 2014). Common competencies were extracted from this cross-walk. They build on, and support, those that were produced by Stevahn et al. (2005).

The competencies list was adopted by the CES Council in May 2009. The list was revised after extensive consultation with the membership (Buchanan & Kuji-Shikatani, 2014). The competencies were subsequently elaborated by adding descriptors compiled by the Credentialing Sub-Committee. A further consultation and validation process with expert evaluators throughout Canada was undertaken to enhance the credibility and reliability of the descriptors.
In addition, six of the members of the Credentialing Sub-Committee conducted an internal validation of both competencies and descriptors. All of the members were long-time professional evaluators or teachers of evaluation. An attempt was made to be inclusive of the many diverse areas and fields that utilize evaluation. Not all members of the subcommittee were in agreement with all of the descriptors proposed. The objections centred on the proposed number of descriptors and the wish for increased specificity. However, the subcommittee members agreed that the descriptors could go forward to the validation stage where other experts could make suggestions.

The subcommittee considered it necessary to add a competency in the Technical Practice domain to better address qualitative methods. To accompany “assesses the validity of data” and “assesses the reliability of data,” the subcommittee added “assesses trustworthiness of data.” As defined by Lincoln and Guba (1985), trustworthiness is a standard in qualitative methods that parallels validity and reliability in quantitative methods. Since the development of the concept in the 1980s, trustworthiness has been applied to ensure rigour in qualitative methods (e.g., Patton, 2002). The International Board of Standards for Training, Performance, and Instruction addresses trustworthiness in its organization’s taxonomy of competencies (Russ-Eft et al., 2008).

DEVELOPMENT OF THE DESCRIPTORS

This section will describe the development of the descriptors.

Are descriptors needed?

In exploring the need for descriptors, the subcommittee found that competencies were generally clarified through various kinds of elaboration. CES members, too, indicated that the initial set of competencies needed elaboration. The descriptors would help give users of the competencies (Credentialed Evaluator [CE] applicants, CE selection board, academic course developers, and others) a shared understanding of the competencies.

Fundamental working principles articulated by the PDCC were considered in the development of descriptors. These principles were inclusiveness, partnering, utility, feasibility, and transparency. The Credentialing Sub-committee also took into account the following variables as it conducted its work on the descriptors of the competencies.

- **Clarity.** Can the descriptor be understood and interpreted reliably?
- **Feasibility.** Can the descriptor be implemented in various contexts?
- **Behavioural 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?

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The writers researched the descriptors for all competencies by using current literature (including numerous texts by prominent evaluators) and observations of current practice. The descriptors were subsequently reviewed by the members of the subcommittee and further distilled, changed, and corroborated. It should be noted that some members would have preferred more rigorous assessment criteria for awarding the credential. One member had previously presented a minority report to suggest a more rigorous certification process than credentialing (Long, 2007).

As the work proceeded, descriptors with similar intent or meaning were combined to achieve a manageable set, while keeping the diversity of practical applications in mind. The writers were very conscious of the number of descriptors produced so as to avoid unnecessary complexity.

The competency descriptors shown in Table 1 are samples of the total set, which can be accessed in the document at http://evaluationcanada.ca/. In the table, the heading provides the domain; on the left are the competencies and on the right the descriptors.

Table 1. Samples of Competency Descriptors Across Five Domains

<table>
<thead>
<tr>
<th>1.0 Reflective Practice Domain</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relevant competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one’s evaluation expertise and needs for growth. Two sample competencies are provided.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Competency</th>
<th>Descriptors of the Competency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0.1 Applies professional evaluation standards</td>
<td>1) Apply the Canadian/US Joint Committee Program Evaluation Standards, <a href="http://www.jcsee.org/program-evaluation-standards/">http://www.jcsee.org/program-evaluation-standards/</a> 2) Apply the five dimensions of the Standards: feasibility, propriety, utility, accuracy, and meta evaluation 3) Recognize the Standards are illustrative and to be used with discernment as required in diverse contexts and propriety obligations</td>
</tr>
<tr>
<td>1.0.4 Considers human rights and the public welfare in evaluation practice</td>
<td>1) Address the Joint Committee Program Evaluation Propriety Standards, particularly P1 “Responsive and Inclusive Orientation.” 2) Engage in open and participatory practices demonstrating that public welfare was considered 3) Contextualize evaluation work within human rights regimes and rights-based approaches 4) Consider roles and responsibilities of duty bearers and rights holders 5) Identify diverse public welfare contexts and outcomes, including gender equality, age, sexual orientation, ethnicity, language, social class, disability, culture, religious beliefs and practices, customs, and cultural norms 6) Consider the balance between social and individual welfare for the good of society</td>
</tr>
</tbody>
</table>
2.0 Technical Practice Domain

Relevant competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting. Two sample competencies are provided.

<table>
<thead>
<tr>
<th>Competency 2.3</th>
<th>Descriptors of the Competency</th>
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</thead>
<tbody>
<tr>
<td>Determines the purpose for the evaluation</td>
<td>1) Specify the evaluation questions</td>
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<tr>
<td></td>
<td>2) Verify the accuracy and the appropriateness of the questions with stakeholders</td>
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<td></td>
<td>3) Clarify expectations and explore possible unintended answers</td>
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<td></td>
<td>4) Take into account values and assumptions underlying the purpose</td>
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<td></td>
<td>5) Monitor conditions that could modify the purpose on an ongoing basis</td>
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<td></td>
<td>6) Negotiate changes as required, taking the needs of the stakeholders into account</td>
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</table>

<table>
<thead>
<tr>
<th>Competency 2.6</th>
<th>Descriptors of the Competency</th>
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</thead>
<tbody>
<tr>
<td>Develops evaluation designs</td>
<td>1) Identify technically adequate designs, in the context of program/policy and strategic objectives, that address the evaluation questions; and investigate and document their quality</td>
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<tr>
<td></td>
<td>2) Differentiate process and outcome questions and establish appropriate indicators</td>
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<td></td>
<td>3) Establish evaluation feasibility and appropriateness through stakeholder consultation and program documentation</td>
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<tr>
<td></td>
<td>4) Anticipate problems and limitations of the design</td>
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<tr>
<td></td>
<td>5) Propose innovative ideas and new solutions to problems</td>
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<td></td>
<td>6) Choose most effective and efficient design given the available resources</td>
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<tr>
<td></td>
<td>7) Employ triangulation, where appropriate, by using one or more of the following: multiple methods, multiple researchers, multiple data sources, multiple theories</td>
</tr>
</tbody>
</table>

3.0 Situational Practice Domain

Competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied. Two sample competencies are provided.

<table>
<thead>
<tr>
<th>Competency 3.1</th>
<th>Descriptors of the Competency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Respects the uniqueness of the site</td>
<td>1) Assess and appreciate the characteristics and conditions of the evaluation site for the program/project evaluation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Competency 3.2</th>
<th>Descriptors of the Competency</th>
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<tbody>
<tr>
<td>Examines organizational, political, community, and social contexts</td>
<td>1) Assess the organizational structure and culture of the program/project</td>
</tr>
<tr>
<td></td>
<td>2) Recognize and monitor the political influences that may affect the evaluation</td>
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<td></td>
<td>3) Understand and be responsive to the community in which the evaluation will occur</td>
</tr>
<tr>
<td></td>
<td>4) Understand and be responsive to the social context in which the evaluation will occur</td>
</tr>
</tbody>
</table>

(Continued)
### 4.0 Management Practice Domain

**Competencies focus on the process of managing a project or evaluation, such as budgeting, coordinating resources, and supervising. Two sample competencies are provided.**

<table>
<thead>
<tr>
<th>Competency</th>
<th>Descriptors of the Competency</th>
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</thead>
<tbody>
<tr>
<td>Competency 4.1</td>
<td><strong>Defines work parameters, plans, and agreements</strong></td>
</tr>
<tr>
<td>1) Develop a scope statement for the evaluation, listing the tasks to be included in the evaluation</td>
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<tr>
<td>2) Develop a work plan to include all phases of the evaluation including tasks, deliverables, milestones, scheduling, and resources, and who is responsible for each task</td>
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<tr>
<td>3) Attend to emerging realities of the evaluation</td>
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<tr>
<td>4) Conduct contract negotiations between the stakeholders requesting funding for the evaluation and evaluation consultant</td>
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<tr>
<td>Competency 4.3</td>
<td><strong>Attends to issues of evaluation feasibility</strong></td>
</tr>
<tr>
<td>1) Apply the Canadian/US Joint Committee Program Evaluation Feasibility standard and the ethical guidelines of the Canadian Evaluation Society</td>
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<tr>
<td>2) Determine if the evaluation project should not occur, or if it should not occur at the time the evaluation is requested (evaluability evaluation)</td>
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</table>

### 5.0 Interpersonal Practice Domain

**Competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity. Two sample competencies are provided.**

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<thead>
<tr>
<th>Competency</th>
<th>Descriptors of the Competency</th>
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<tbody>
<tr>
<td>Competency 5.1</td>
<td><strong>Uses written communication skills and technologies</strong></td>
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<tr>
<td>1) Describe the program, its context and environment, and assumption in clear and understandable language that is easily accessible to the stakeholders addressed</td>
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<tr>
<td>2) Write reports that effectively communicate the processes of the evaluation</td>
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<tr>
<td>3) Write concise summary reports for different audiences</td>
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<tr>
<td>4) Write conclusions and recommendations that can be easily understood and assimilated</td>
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<tr>
<td>5) Communicate negative findings with a view to learning and improvement</td>
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<tr>
<td>6) Use communication technology effectively (e.g., e-mails, social networking tools, etc.)</td>
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<tr>
<td>Competency 5.6</td>
<td><strong>Uses facilitation skills (group work)</strong></td>
</tr>
<tr>
<td>1) Draw on several facilitation techniques (role play, brainstorming, simulation, building consensus, debriefing, Delphi, etc.)</td>
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<tr>
<td>2) Employ open, honest dialogue</td>
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<tr>
<td>3) Motivate others</td>
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<tr>
<td>4) Integrate diverse perspectives</td>
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<tr>
<td>5) Deal with challenging dynamics</td>
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<tr>
<td>6) Reach sustainable decisions</td>
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</table>
THE VALIDATION RESEARCH

Validating is “finding or testing the truth of something” (Wordnet, Princeton University, 2014). For the purpose of developing competencies and descriptors, validation meant ensuring that the Canadian evaluation community considered them to be the key attributes of competent evaluators.

The foundation upon which the Canadian competencies were built had already been the subject of repeated validation exercises. The Taxonomy of Essential Competencies for Program Evaluators, first published by King, Stevahn, Ghere, and Minnema in 2001 and later revised by the same team (Stevahn et al., 2005), acted as the foundation for the Canadian Cross-walk of Program Evaluator Competencies (Canadian Evaluation Society, 2008). In the initial validation, the authors of the Taxonomy used a Multi-Attribute Consensus Reaching procedure with 31 participants representing diverse evaluator roles, training, and experience in Minnesota, USA. After the 2001 publication, King and the others consulted with over 100 individuals to obtain further input into the initial set of competencies. The team incorporated this input into the revised taxonomy in 2005. They also conducted a thorough cross-walk of the competencies with reference to three documents: The Program Evaluation Standards endorsed by the Joint Committee on Standards for Educational Evaluation (1994), the Guiding Principles for Evaluators endorsed by the American Evaluation Association (2005), and the Essential Skills Series endorsed by the Canadian Evaluation Society (1999). Using a similar approach, CES held broad consultations in Canada on the CES version, including a 2008 CES member survey to which 99 of the 1500 members (approximately 5%) responded (Buchanan & Kuji-Shikatani, 2014). Of these, a majority (75%) agreed that “overall the CES Competencies for Canadian Evaluation Practice provided a good basis for the development of credentials” (p. 37). Additional consultations were held across Canada by CES chapters, reaching approximately 17% of the membership.

The Credentialing Sub-Committee developed the following objectives for its subsequent validation exercise:

1. To seek expert opinion and feedback on the proposed competencies and their related descriptors to augment the base for CES adoption of these.
2. To refine as needed the draft evaluator competencies.
3. To refine and ensure that the descriptors reflect key aspects of the competencies.

It was felt essential to have input from selected experts of the evaluation community. The committee proceeded with measured caution, keeping in mind that we were building a foundation that could generate further refinement and development. At this early stage in the CES experience with professional designations, a rigorous validity study was not undertaken. The aim was to generally increase reliability and validity, and it was felt that a fairly informal approach was appropriate at this stage. The credential to be offered by the CES was to indicate...
that “[t]he holder has provided evidence of education and experience required to be considered a competent evaluator” (Canadian Evaluation Society, 2010). The credential was not meant as a certification, that is, proof of attainment as measured by an examination or some other process. An external body such as a credentialing board would aim to determine the skills the applicant may have received in their education or training and review experiential evidence related to the competencies. The descriptors provided details of desirable background, knowledge, skills, and dispositions related to the competencies.

RESULTS OF THE INITIAL VALIDATION EXERCISE

Invitations went to the 46 evaluators who were on the list of CES award winners at that time (recipients of more than one award were counted once). A total of 17 invited experts responded (6 addresses were returned as not valid).

Respondents represented three sectors: universities (4), private firms (11), and government (2). Eight were located in Ontario, with the rest fairly equally distributed over all other provinces. Primary areas of work indicated by the respondents show a broad cross-section: health care, education, youth, government, policing, organizational development, human services, policy, business, training, UN, and teaching. In answer to the question about evaluation specialty, 14 respondents described a wide variety: (a) outcomes; (b) all aspects of evaluation; (c) health and social services; (d) research evaluation; (e) teach, research, practice; (f) federal government; (g) organizational development and design; (h) general; (i) community-based evaluations; (j) generalist program design; (k) assessment cost-effectiveness; (l) program design; (m) economic and financial aspects of evaluation, data-based measurement of effects; and (n) conducting multimethods program evaluation.

Respondents rated domains, competencies, and descriptors for their appropriateness to Canadian evaluator practice. The categories on the four-point scale were “inappropriate,” “somewhat appropriate,” “appropriate,” and “very appropriate.” Comments were invited. The ratings revealed overall strong support of the taxonomy among the expert reviewers. Ratings for individual domains, competencies, and descriptors were generally quite high, with some exceptions.

COMPETENCY DOMAINS

Combining the “appropriate” and “very appropriate” categories (see Table 2), the results for the domains showed the strongest support for Technical Practice (100%) and the least for Reflective Practice (77%). The only domain that received the "inappropriate" rating was Reflective Practice (2 of the 17 respondents). However, as the domain names were not yet associated with competencies, lack of familiarity with the term may have influenced the initial responses. When the competencies provided definitions of the domain, it became clear that only two of the competencies for the Reflective Practice domain were rated low.
Developing Competencies and Descriptors 63

Support among the expert reviewers for competencies was strong. For the most part, competencies in all domains received “appropriate” or “very appropriate” ratings. Competencies in the Technical Practice domain received very strong support, with three competencies earning 100% “very appropriate” ratings. For an overview of the results of ratings for the 45 competencies, here are the highest “very appropriate” ratings for competencies in each of the domains:

**Reflective Practice** (total of 6 competencies)
- Applies professional evaluation standards (81%).

**Technical Practice** (total of 14 competencies)
- Understands the knowledge base of evaluation (100%)
- Develops evaluation designs (100%)
- Defines evaluation methods (100%).

**Situational Practice** (total of 9 competencies)
- Serves the information needs of intended users (73%).

**Management Practice** (total of 6 competencies)
- Identifies required resources (73%).

**Interpersonal** (total of 9 competencies)
- Uses written and verbal communication skills (71%)
- Demonstrates professional credibility (71%).

Of the 45 competencies, only the following five received below 75% when “appropriate” and “very appropriate” ratings were combined. Note that the three that were rated under 70% were considered “somewhat appropriate.”

- Pursues professional networks and self-development (74%)
- Attends to issues of evaluation use (66.7%)
- Attends to issues of organizational change (73.2%)

**Table 2. Ratings of Domains**

<table>
<thead>
<tr>
<th></th>
<th>Percentage of Respondents (n)</th>
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<tbody>
<tr>
<td></td>
<td>Inappropriate</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Reflective Practice</td>
<td>15% (2)</td>
</tr>
<tr>
<td>Technical Practice</td>
<td>0</td>
</tr>
<tr>
<td>Situational Practice</td>
<td>0</td>
</tr>
<tr>
<td>Management Practice</td>
<td>0</td>
</tr>
<tr>
<td>Interpersonal Practice</td>
<td>0</td>
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</table>

**INDIVIDUAL COMPETENCIES**

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- Shares evaluation expertise (66.7%)
- Coordinators and supervises others (66.7%).

Comments on the competencies gave suggestions for refinement and for additional competencies, and in some cases questioned the competency. Here are some examples:

Missing: develops reliable and valid measures/tools as well as appropriate software skills.

“Attends to issues of evaluation use” doesn’t seem strong enough. Instead of “shares evaluation expertise” (or in addition to) I’d like to see something on evaluation capacity-building.

One can be a competent evaluation manager without supervising others.

Demonstrating credibility isn’t a competency on its own ... demonstrating evaluator competencies then demonstrates credibility.

In response to the comments, several changes were made: clarifying wording, removing redundancies, splitting double-barreled competencies, and adding new competencies, to arrive at a final total of 49 competencies.

**DESCRIPTORS OF EACH COMPETENCY**

Support among the expert reviewers for the 200 descriptors was generally strong. With “appropriate” and “very appropriate” ratings combined, the results were as follows:

- 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%.

The following are examples of descriptors with ratings of 100% (“appropriate” and “very appropriate” combined):

- Understand the program and the logic model
- Clarify expectations
- Take into account values and assumptions underlying the purpose
- Negotiate changes as required, and specify the evaluation questions.

Examples of descriptors with ratings under 75% (“appropriate” and “very appropriate” combined) include the following:

- Contextualize evaluation work with human rights regimes and rights-based approaches (53.9%)
- Develop monitoring strategies of change (47.6%, lowest rating).
The high approval for the descriptors in the Technical Practice domain echoes the strong support for this domain (Table 2). Although the Reflective Practice domain received the lowest acceptance (Table 2), most descriptors in this domain were rated very high, suggesting we may be correct in attributing the lower rating for the domain to an initial lack of familiarity with the term. The exception to the high Reflective Practice descriptor ratings were those for Competency 1.4: “Considers human rights and the public welfare in evaluation practice.” This competency’s five descriptors ranged from 28% to 35% (“appropriate” and “very appropriate”).

Respondents who commented on the descriptors offered many varied suggestions for improvement. These comments were carefully noted and changes were made in accordance with the recommendation, resulting in a final total of 206 descriptors.

The overall results of the expert review showed strong support for the taxonomy as a whole. Having drafted the descriptors, we were pleased with positive feedback on our efforts but were also happy to see suggestions for improvement. Both competencies and descriptors need further refinement and updating by experts from broadly ranging evaluation practices.

CHALLENGES

As members of the subcommittee helping CES develop the first evaluator professional designation in the world, we encountered several challenges. Chief among them were the resources required to carry out this project. All members of the subcommittee worked on a pro-bono basis and invested significant amounts of their time and expertise. While the competencies were built on a foundation of work conducted by others, the descriptors required extensive primary research that was at times curtailed by pressing timelines.

Our initial goals, particularly with respect to the validation process, had been somewhat more ambitious than the resources could support. Context and environment determined much of what could be realized. Rather than implement the multisteped approach that was envisioned, we proceeded with a simplified methodology. Although it had been our intent to employ several data collection methods and analyses, in the end we did what was feasible. Initially, the selected experts were to be randomly assigned to three methods of data collection, one group for the questionnaire, one for interviews, and one for a Delphi study. In actuality our resources and volunteer fatigue allowed for only the survey. Even then, the number of survey questions taxed the respondents, and some reported that it took them over one hour to complete.

Considerable fluctuation in committee membership occurred during the 19-month process. Committee changes necessitated bringing everyone up to date repeatedly. Discussions on resources and debates that had already taken place were reopened. The core members worked to achieve a balance between efficiency and extensive open consultation in an effort to address the principles of inclusiveness and transparency. This lengthened the process.
Doubts about some aspects of the taxonomy lingered among members of the subcommittee. These limitations were discussed among the group:

- There may still be too many dimensions.
- There may be unnecessary overlap.
- Descriptors vary in appropriateness.
- Some descriptors seem applicable to senior evaluators and some to more junior evaluators.
- A definition section may be needed, particularly with reference to the competencies themselves and the Reflective Practice domain.
- There was some feeling that Reflective Practice refers to values and ethics rather than to competencies.

Irrespective of these challenges, every effort was made to achieve a common platform of practice for the evaluation community and the evaluation users. It is understood that the platform will need to be stabilized and built upon. Evaluation is a diverse field of knowledge with changing practices and theories that cover several disciplines. The present competencies and descriptors will, we hope, be refined and complemented in the future.

CONCLUSION

Building a framework for valid evaluator competencies presupposes certain knowledge, skills, and dispositions. We perceive validity as the single most important aspect of identified competencies. Validity helps ensure the competencies are actionable and serve their intended purposes. Judgements based on competencies should be useful to evaluation, and beneficial to the evaluator and to the evaluation community.

A precise description of what is meant by each competency helps ensure that expectations are clear. Descriptors increase the accuracy of the competencies and support judgements based on defensible criteria. Accuracy is particularly central, because in evaluation, as in other complex and variable systems, the quality of inferences is influenced by the precision of terms.

The Reflective Practice and Interpersonal domains are particularly infused with judgements drawn from competencies and descriptors. In those domains, ethics and values strongly affect behavioural outputs specific to contexts and programs but the linkage is more tenuous than in the technical domain. Thus, the guidance provided for ethics and values in particular must be seen as trustworthy. The ethical guidelines of the Canadian Evaluation Society and the Program Evaluation Standards from the Joint Committee on Standards for Educational Evaluation are critical and need to be regularly consulted by evaluators. Specificity of descriptors lessens individual interpretations and threats to their intended purpose.

Our hope is that the competencies and descriptors will fulfill all the purposes intended, helping evaluators to improve their evaluation skills, and guiding all
who seek to improve the quality of evaluations and the credibility of the field of evaluation. So far we have seen the competency document employed in the CES credentialing process and in new developments in evaluation education. We have also seen employers and agencies begin to orient their evaluation projects and hiring practices to this source. We are grateful to the many hands that contributed to the development of this important taxonomy over many years.

**FUTURE DIRECTIONS**

What can the future bring? We would like to see a systemic mechanism of review of competencies and descriptors—one that has a regular cycle and process. Potentially, working groups could be convened, one for each domain. These groups could each consist of two to three Credentialing Board members and Credentialed Evaluators and be organized through the Vice President. To ensure coherence and check for unnecessary repetition, one member from each working group could convene with the others to review all the recommendations together. Results could then be validated at a conference workshop or presentation and approved by National Council.

The field of evaluation may become a discipline with an elaboration of a theory that would encompass broad principles and at the same time reflect situation- and context-specific parameters. It may be a theory of change or a theory of evaluation or both. The competencies and descriptors are the basic underpinnings meant to define evaluation competencies today; they will be influenced and modified by a theory as much as they will influence it. As competencies are refined and modified, further research to validate them is required. In this process, evaluation societies could expand their network of partnerships and collaborations and together produce research that brings the field of evaluation forward as a credible and essential part of all programs, policies, and initiatives.

**REFERENCES**


**AUTHOR INFORMATION**

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