How to Teach Evaluation

Editor's Remarks / Un mot de la rédactrice
Isabelle Bourgeois

PRACTICE NOTES

Why a Special Issue of Practice Notes about How to Teach Evaluation?: Introducing This Special Issue of The Canadian Journal of Program Evaluation
John M. LaVelle and Jill Anne Chouinard

UEval: Bringing Community-Based Experiential Learning to the Evaluation Classroom
Rebecca Jayne Gokiert, Jason Daniels, Cheryl Poth, Ana Karbabian, David Peacock, Jane Springett, Ken Cor, Deanna Williamson, Emma Wallace, Chelsea Freeborn, Mischa Taylor, Shelly Jun, Jasmine Brazil, Sheila Pittman, Andrea Diamond, and Christina Popescu

Competency-Based Evaluation Education: Four Essential Things to Know and Do
Cheryl Poth and Michelle Searle

The Role of Evaluative Thinking in the Teaching of Evaluation
Thomas Archibald

Praxis Makes Perfect? Transcending Textbooks to Learning Evaluation Experientially and in Cultural Contexts
Nicole Bowman (Waapalaneexkweew)
Establishing and Developing Professional Evaluator Dispositions  
*Randall S. Davies*  
330

Strategies for Mentoring and Advising Evaluation Graduate Students of Colour  
*Ayesha S. Boyce*  
350

Offering Graduate Evaluation Degrees Online: Comparing Student Engagement in Two Canadian Programs  
*James C. McDavid and Robert P. Shepherd*  
363

Teaching Africa-Rooted Evaluation: Using a “Model Client” Innovation to Help Shift the Locus of Knowledge Production  
*Sarah Chapman, Suki Goodman, Adiilah Boodhoo, and Nombeko Mbava*  
374

If Building Trust Is Important, How Do We Teach Novice Evaluators to Do It?  
*Bianca Montrosse-Moorhead*  
384

Helping Students Reflect on Their Interpersonal Skills: The Team Performance Scale (TPS)  
*Chris Y. Lovato and Graham Shaw*  
395

Using People Styles for Interpersonal Competence: Encouraging Purposeful Reflection on Communication Behaviours  
*Tiffany Lee Smith*  
403

Fieldwork Experience as Cultural Immersion: Two International Students and Their Professor Reflect on a Recent Evaluation Practicum  
*Grettel Mariana Arias Orozco, Onyinyechukwu Onwuka du Bruyn, and Jill Anne Chouinard*  
413

Collaborative Evaluation Designs as an Authentic Course Assessment  
*Michele Searle and Cheryl Poth*  
422

Pinpointing Where to Start: A Reflective Analysis on the Introductory Evaluation Course  
*Robyn Thomas Pitts*  
437

In Their Own Words: Student Key Learning Experiences in an Introductory Evaluation Course  
*John M. LaVelle and Zhou Yang*  
450
Re-Envisioning Evaluation Pedagogy with a Community of Scholar Teachers

_Jill Anne Chouinard and John M. LaVelle_

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I am pleased to introduce this special issue, guest edited by John M. LaVelle and Jill A. Chouinard. Evaluation education is at the heart of what we do, whether we teach in university settings, offer professional development and training courses, or mentor colleagues who are new to our field. Indeed, the work of an evaluator often involves educating others on the value, process, and impacts of evaluation; stakeholders, decision-makers, and users are all potential students of evaluation, as are current and future evaluators. Chouinard and LaVelle have successfully brought together evaluation educators from diverse backgrounds and perspectives to describe how evaluation can be taught and learned. This innovative volume is also the first issue of CJPE to be entirely composed of Practice Notes, and it provides easily transferable ideas and lessons from which our community will undoubtedly benefit. I am grateful to the authors of these 15 Practice Notes who have agreed to share their thoughts, experiences, and tools with us and to our two guest editors for managing this ambitious project. Please share with us your key takeaways and all of the ways in which you’ve implemented these ideas.

Isabelle Bourgeois
Editor-in-Chief
Je suis heureuse de présenter ce numéro spécial, pour lequel John M. LaVelle et Jill A. Chouinard ont été les rédacteurs invités. La formation en évaluation est au cœur de ce que nous faisons, ce que nous enseignons à l’université, ce que nous offrons dans des cours de formation et de perfectionnement ou lorsque que nous agissons à titre de mentor pour de nouveaux ou nouvelles collègues. En effet, le travail d’une évaluateuse ou d’un évaluateur vise souvent à sensibiliser diverses parties prenantes à la valeur, au processus et aux impacts de l’évaluation. Chouinard et LaVelle ont rassemblé plusieurs personnes chargées de cours ou de formation en évaluation provenant d’horizons et de perspectives divers pour décrire la façon dont l’évaluation peut être enseignée et apprise. Ce volume novateur est aussi le premier numéro de la RCEP à être entièrement composé de notes sur la pratique et il offre des idées et des leçons facilement transférables, desquelles notre communauté peut sans doute profiter. Je transmets mes remerciements aux auteurs et autrices de ces 15 textes qui ont bien voulu nous faire part de leurs réflexions, de leurs expériences et de leurs outils, ainsi qu’aux deux rédacteurs invités qui ont géré cet ambitieux projet. N’hésitez pas à nous communiquer les leçons que vous avez tirées de cette lecture et les façons dont vous avez mis en œuvre certaines de ces idées.

Isabelle Bourgeois
Rédactrice en chef
In the field of evaluation there have long been tensions between the ideas of evaluation as a transactional practice and evaluation as an aspirational practice intrinsically related to questions of worth, purpose, and value. While one of the hallmarks of contemporary evaluation remains its practical, problem-solving orientation, evaluation is not simply the technical application of inquiry methods to address “real world” problems (Fitzpatrick et al., 2009; Preskill, 2000; Schwandt, 2008; Shadish et al., 1991). It is also a highly contextualized socio-political process involving a significant, orchestrated interplay between theory and practice, mediated by dialogue and by reflective practice, and its successful practice requires evaluators to engage with constraints, pressures, opportunities, ambiguities, and uncertainties (Chouinard et al., 2017). Evaluation practice is further informed by a constellation of theories and conceptual models from diverse disciplines, by its contexts of practice, and by the evaluator’s moral/political stance and commitment (Schwandt, 2008; House, 2015).

Complicating matters further, some have suggested that teaching and learning are implicitly a part of contemporary evaluation practice. Patton (2017), for example, called learning through an evaluation process a “pedagogy of evaluation,” positing that evaluators and stakeholders alike develop new ideas and new ways of being and acting in the world (Widdershoven, 2001) because of their participation in the evaluation itself. LaVelle et al. (2020) critiqued Patton’s description of a pedagogy of evaluation as incomplete, suggesting that pedagogy is a planned, systematic process that guides an educator’s decisions about when, where, and how to teach. In this case, a pedagogy of evaluation would be understood to describe where and how to teach evaluative principles and processes.

The intentional teaching of evaluation to novice or would-be users of evaluation remains an ongoing challenge. As teachers of evaluation, or evaluator educators, we must help our students develop the technical and artistic aspects of...
evaluation practice and master the theoretical foundations of the field, while at the same time navigating socio-political and economic realities. Teaching evaluation is tricky business in the best of times, and it is incumbent on evaluator educators to help prepare students for the realities of working in this field—a difficult task, given the range of demands placed on educators both inside and outside university settings (LaVelle & Donaldson, in press). How, then, can evaluator educators best prepare their students for practice, and what tools are available to help these educators improve teaching? Unfortunately, beyond the strategies described by Preskill and Russ-Eft (2016), relatively few peer-reviewed resources exist that address how to teach evaluation to students and stakeholders (Preskill, 2000), and even fewer incorporate critical reflections that can help empower others to replicate, refine, and improve upon the original ideas.

In response to this need, we sought the perfect venue for an audacious project: an entire volume of a peer-reviewed journal focused on techniques for teaching evaluation. The Canadian Journal of Program Evaluation (CJPE) was the perfect choice, with its longstanding Practice Notes section giving evaluators a place to share and reflect on what works, what challenges they experienced, and what they would do differently next time. The CJPE Practice Notes format allows contributors to teach while reflecting at the same time.

For this special issue of Practice Notes, we reached out to educators across the world, challenging them to think critically about their own teaching of evaluation. We asked the contributors to describe a particular activity or framework that has guided their educative work, and to reflect on its conceptualization, implementation, and outcomes. We further challenged them to write in a way that allows readers to adapt the ideas and tools to their own context. All within 2,000–3,000 words. In response, the authors have shared their wealth of perspectives, values, and reflections on how to create exceptional learning experiences in evaluation. We enjoyed learning with these colleagues, and hope you do, too.

REFERENCES


**AUTHOR INFORMATION**

John LaVelle is an assistant professor in evaluation studies at the University of Minnesota. His research examines how universities prepare evaluators for applied work, and he has written on the intersection of job markets and university programs, techniques for recruiting evaluators, evaluator competencies, the psychology of evaluators, and how evaluators can use social science theory to inform their practice. He was awarded the American Evaluation Association’s Marcia Guttentag Award in 2019.

Jill Anne Chouinard is an associate professor in the School of Public Administration at the University of Victoria. Much of her evaluation work has been conducted in culturally and socially diverse community settings, where she has extensive experience leading evaluations at the community level in the areas of education, social services, public health, and organizational learning and change. She positions evaluation as a catalyst for learning, collaboration, equity, social justice, and community change.
Abstract: This practice note describes the unique features of, and lessons learned from, UEval, an innovative one-week “evaluation institute” at the Faculty of Extension, University of Alberta. This initiative responds to an identified community and university need to provide contextual and socially relevant evaluation-focused educational opportunities to learners across disciplines and sectors. UEval is guided by principles of participatory and experiential learning and brings together undergraduates, graduates, and community professionals as co-learners for a mutually beneficial and sustainable educational experience. During the week, learners explore and apply evaluation theory through project-based curricula and develop evaluative responses to community-informed issues.

Keywords: evaluation capacity building, evaluation education

Résumé : Cette note sur la pratique décrit les caractéristiques uniques et les leçons tirées d’UEval, un « Institut d’évaluation » novateur d’une semaine, de la Faculty of Extension de l’Université de l’Alberta. Cette initiative répond à un besoin noté au sein de la communauté et de l’université, soit d’offrir des occasions d’apprentissage axées sur l’évaluation et pertinentes d’un point de vue social et contextuel, à des apprenantes et apprenants de divers secteurs et disciplines. L’UEval a été orienté par des principes d’apprentissage participatif et expérientiel et regroupe des étudiantes et étudiants de tous les cycles ainsi que des professionnels de la communauté, dans...
Increasing pressures on community-based organizations to generate evidence of accountability and impact parallel a rising demand for evaluation education. Universities have a pivotal role in training and building the capacity of both working professionals and students entering the workforce to respond to society’s evaluative needs (McShane et al., 2015). In Canada, there is a lack of evaluation-focused higher-level education (Hunter & McDavid, 2018) that equips students with practical and contextual evaluation knowledge and skills (Gokiert et al., 2017). This is problematic; evaluation is used extensively across sectors to measure program and policy effectiveness, and it is in great demand by government, non-profits, and businesses.

This practice note describes UEval, an innovative, one-week evaluation institute at the University of Alberta that bridges evaluation theory and practice to fill a community and university evaluation gap by bringing stakeholders together around community-based experiential learning. In addition to course learnings, UEval serves to build sustainable evaluation capacity through a shared learning space for undergraduate, graduate, and community learners. Through community-informed case-based learning and learner co-creation of evaluation plans, UEval supports community stakeholders by providing them with a tangible evaluation resource.

**EVALUATOR TRAINING**

Evaluator training can increase evaluation capacity and prepare competent practitioners (Gullickson et al., 2019; Johnson, 2018; LaVelle, 2019). UEval was created to foster competency gains through its competency-based curriculum and experiential, co-learning teaching model. Integrating these pedagogical approaches, UEval aims to build reciprocally beneficial evaluation capacity within the university and the community. Professional competency gains can also be explained as evaluation capacity building (ECB), or gains in knowledge, skills, and attitude on how to conduct and use evaluations (Labin, 2014; Preskill & Boyle, 2008; Rogers et al., 2019). Gokiert et al. (2017) identified needs for evaluation capacity at both individual and organizational levels within the social sector—specifically in the form of innovative learning opportunities to cultivate contextual evaluation knowledge and skills. Although recent literature provides examples of learning opportunities with experiential, co-learning teaching models, similar to UEval (Bakken et al., 2014; Mignone et al., 2018; Suiter et al., 2016), few studies describe competency-based course-models (Poth et al., 2020). Competency gains in practical and contextual domains prepare evaluators for effective professional
practice in community contexts (Gokiert et al., 2017). While existing training models equip learners with technical knowledge, many programs are not designed to nurture the knowledge, skills, and dispositions with which learners can apply evaluation theory in practice (Davis & MacKay, 2014; Dewey et al., 2008; Galport & Azzam, 2017; Johnson, 2018).

Hands-on, experiential teaching and co-learning enhance learner engagement in evaluation training (Boyce & McGowan, 2019; Darabi, 2002; Kayet-Tzadok & Spiro, 2016; Oliver et al., 2008). Students learn course concepts through problem solving with applied contexts and real-life cases (Oliver et al., 2008; Suiter et al., 2016). The instructor’s role becomes that of facilitator and fellow co-creator (Bhola, 1998). Problem-focused learning and facilitation empower students to think through their decisions, while encouraging them to seek the instructor’s guidance or expertise when needed (Oliver et al., 2008). The result is a more active and reflective role of learners (Darabi, 2002; Suiter et al., 2016).

UEval’s constructivist pedagogy informs its experiential, co-learning teaching model, allowing peers to learn from and with one another, with the goal of constructing new knowledge and applying it to their context (Bhola, 1998; Buckley et al., 2015). Co-learning emphasizes an egalitarian learning partnership that equally values the input of all participants (Bhola, 1998; Farnsworth et al., 2016). The co-learning process enhances learning because it relies on the collective responsibility of learners in knowledge co-construction and application (Bhola, 1998; Buckley et al., 2015) as “interdependent co-learners and co-investigators” (Suiter et al., 2016, p. 553). This practice note outlines how UEval’s constructivist pedagogy informs its co-created curriculum and addresses the call for further research about the significance of pedagogy in informing evaluator education (LaVelle, 2020).

**UEval BACKGROUND AND CONTEXT**

Prior to the genesis of UEval, several of the authors conducted an evaluation capacity needs assessment in Alberta (Tink et al., 2017), finding that universities have a pivotal role in increasing the evaluation capacity of the health and social sector by providing evaluation-based expertise, brokering student capacity through practicums, and providing education for university students (McDavid & Devine, 2009; McShane et al., 2015). Students are eager to build new skills and are seeking community-based research, evaluation, and learning opportunities (Gokiert et al., 2017; Mignone et al., 2018). They recognize the need to equip themselves with contextual knowledge and skills to navigate a social sector with complex challenges (Armitage & Levac, 2015; Porter et al., 2018).

Responding to these findings, we formed a partnership among faculty, students, funders, and community stakeholders who recognized the need to bridge gaps in community and university evaluation. We received funding through a University of Alberta Teaching and Learning Enhancement Grant to develop and pilot a one-week evaluation institute in spring 2019. We formed a Learning Advisory Committee (LAC) with stakeholders able to represent UEval’s diverse learner needs and guide its development. LAC representation, drawn from the
partnership, included campus faculty (Public Health, Pharmacy, Community Service Learning, Education, Human Ecology, Extension), a municipal government body (City of Edmonton), two community funders (United Way of the Capital Region, Edmonton Community Foundation), and the Alberta/Northwest Territories chapter of the Canadian Evaluation Society (CES).

To learn from a similar experiential, constructivist model of teaching and learning, Gokiert and three students (two graduate and one undergraduate) participated in the Summer Institute in Program Evaluation at the University of Manitoba (Mignone et al., 2018). As learners, facilitators, lecturers, and observers, they explored the Institute’s evaluation education model, real-life evaluation plans in a one-room school, and determined its feasibility and application within the Alberta context. UEval was designed as a case-based experiential, co-learning space for evaluation training. From June 3–7, 2019, UEval was piloted as a three-credit undergraduate, graduate, and non-credit continuing and professional education course. Co-instructed by authors Gokiert and Daniels, the course engaged 52 learners from across seven faculties, 15 disciplines, and 13 community-based organizations. Prior to the one week of in-class sessions, learners completed four online modules covering the fundamentals of evaluation and providing a foundational understanding of evaluation language and theory. During the in-class sessions, learners explored and applied evaluation theory through case-based curricula. The institute instruction involved a mix of didactic lectures alongside experiential activities in the mornings and facilitated case-study group work in the afternoons (see Figure 1). Seven local community case studies informed the case-study group work and provided learners the opportunity to develop tailored evaluation plans with case-study key informants. Below, we elaborate on four key elements of UEval’s instructional model that were critical to its development and delivery.

Co-constructed curriculum
As UEval was intended to foster university and community-engaged evaluative learning, the LAC was tasked with UEval’s development, and members are included here as authors. We met monthly to develop course objectives and online and in-class curricula, and to select relevant community case studies for the week of the institute. We engaged graduate students as research and teaching assistants to support the LAC and co-instructors (Gokiert and Daniels) in UEval’s development and implementation, and we made every effort to construct the curriculum with CES competencies (2018) in mind, including CES representatives on the advisory committee, and choosing pre-/post-course assessments that included these competencies. We received ethics approval from the University of Alberta ethics board to study the development and pilot delivery of UEval.

Blended and experiential learning
Following a “flipped” blended delivery approach, UEval provided online instruction two weeks prior to the in-class sessions. Learners accessed online instruction
Figure 1. UEval Institute at a glance
through e-class, a Moodle learning service, which offered a downloadable library of resources to inform class assignments or practice, along with interactive modules. Online modules were hosted on ISeazy, a web-based platform, and were accessible any time during the two weeks. Our goal was to provide content to build technical and foundational evaluation knowledge. As one learner shared, “[the modules] created somewhat of a level ‘playing field’ for the practical in-class work, which I thought was fantastic!” Upon completing each module, learners could test their newly acquired knowledge through quizzes and engage with peers in discussion forums.

UEval’s blended and condensed format is innovative in offering a flexible learning structure that accommodates busy community partners and university students. Equally, UEval’s model of experiential, co-learning is unique; rather than students going into the community for practicums or community service-learning, UEval brings the community to the classroom. UEval engaged community members as learners, and many brought cases from their organizations for co-learning and co-creation alongside students. In the mornings, the co-instructors delivered lectures complementing the pre-institute online modules and prepared learners for their case-study activities. Experiential learning exercises followed; in pre-assigned groups, students co-constructed knowledge, sharing ideas of how lecture content applied to a local, multi-stakeholder illustrative case study used throughout the week.

Case-study group work in the afternoons allowed learners to collaboratively test and apply what they had learned. Students and community partners explored and co-created evaluation plans for seven different community-based case studies. Each learner was pre-assigned to a group based on the relevance of their academic or professional background to the topic, and groups included about eight participants—learners, key informant(s), and a facilitator. To help commence discussion, each group received a two-page handout detailing program history, objective(s), and evaluation need/rationale. A learners’ handbook included instructions, activities, and questions to guide discussions and ensure that key evaluation plan elements were addressed. At week’s end, each group presented an evaluation framework, with guests invited from the community. Facilitators were integral to the case-study group work, encouraging equitable participation, mediating interpersonal conflicts, and providing evaluation mentorship. They were selected on merits of teaching or facilitating experience, as well as working knowledge of evaluation concepts. All facilitators participated in a one-day training workshop to discuss the case-study documents, student handbook, protocols for team development, conflict resolution, and learner expectations.

**Interdisciplinary and intersectoral learners**

Fifty-two learners participated in UEval: 17 community learners, 31 university students, and four auditors. To recruit learners, weekly advertisements for prospective students and community partners were placed in diverse media, including university newsletters, listservs, and newsletters of local community organizations, and through the wider professional community, such as the CES.
We also employed social media posts and a short video on university TV monitors. Students included four undergraduate and 27 graduate students, the majority of whom were Master’s level, from across seven faculties and 15 disciplines on campus. Community learners represented local community-based organizations from the public and private sectors, and many participated with the dual role of learner and key informant to a case study.

Case study topics varied widely and included campus food security, early literacy, early childhood development, public washrooms, and care of seniors. A call for submissions was circulated through multiple intersectoral social network and media platforms. Interested organizations submitted an online interest form and were expected to send a key informant to participate, should their case study be accepted, to answer specific questions about the case’s context.

**UEval learning evidence**

UEval learners completed several graded assessments, and assignments to promote dialogue and reflection were woven into the course. Survey results from the beginning and end of the course indicated increased CES competency gains. Learners also completed individual final reflections on the learning experience, including CES competencies, major course learnings, and the group process. Many concluded that they became cognizant of how little they knew about evaluation. As one learner stated, “until hearing the importance of these competencies in the lectures and group work, I didn’t realize there was a lot I still needed to learn.” Learners identified diversity as an opportunity for them to garner alternate/holistic perspectives from their intersectoral and interdisciplinary peers:

> In learning from individuals in different fields, we come to better see the interconnectedness of issues and the impacts on systems and communities as a whole, rather than in isolation. Through engaging with colleagues from a variety of sectors, it opens up new ways of analyzing complex problems and the possibility for solutions to these complex problems. The opportunity to connect and learn from each other from our various positions . . . was an invaluable part of this course.

On the institute’s last day, each case study group gave a 20-minute presentation of its evaluation plan. A small grade weight was allotted to anonymized peer assessments of these presentations. The course culminated in the final evaluation plan. Learners were allowed to modify the collective work of their case-study group when writing the plan individually or in smaller groups. In addition to serving as an assessment tool, the final plan was a valuable product for the community partners and organizations that planned to conduct evaluations in the near future. These evaluation plans, with data-collection methods and schedules, knowledge translation strategies, and helpful resources for implementation, constituted a significant starting place for organizations to begin their own evaluations.

The diversity of learners and worldviews contributed to the knowledge gained during training and shaped how students engaged in co-learning and consensus building. Co-construction of the final evaluation framework included the challenging task of arriving at consensus with peers and the key informant. In contrast
to case-based evaluation courses where learners have time to process information about the program after meeting the stakeholder, UEval learners had both the benefit and challenge of conversing with the key informant in class and quickly making decisions. Discussions and brainstorming—core activities of consensus building—required that learners reconcile and negotiate diverse ideas while remaining respectful.

**REFLECTION**

We reflect on our learnings, and share UEval’s pedagogy, strengths and challenges, with the hope that other educators may be able to implement similar initiatives. With anticipated future deliveries of UEval, reflection is also important for improving the course.

**Co-constructed curriculum**

The LAC’s community–university engaged process for course development ensured that the curriculum was relevant across different disciplines and sectors, and the collaboration of diverse stakeholders ensured that the course’s content aligned with its constructivist pedagogy. UEval will continue to include a co-creation process: among LAC stakeholders for course content, and among learners during the institute. In a move that addressed the LAC concern that the course be beneficial and accessible to community organizations and learners, funding opportunities were provided to offset tuition costs.

**Blended and experiential co-learning**

The goal of the pre-institute online learning was to introduce foundational evaluation concepts, allowing more classroom time for instruction, experiential learning, and co-creation. We directed the online module content to learners from a variety of academic backgrounds and exposure levels to evaluation. Some learners who had not recently been in school or who had not taken a methods course found the materials more challenging and took longer than the anticipated one hour to complete each module. Learners also expected that instructors would reiterate module content during the institute. Conversely, instructors added depth to the online modules through a series of experiential activities in class and the opportunity to participate in the real-life case study. In future institutes we plan to reiterate some module content—without reproducing it—before starting the experiential exercises.

The modules also provided a virtual space for an online community of practice. Learners expected instructors to moderate the online forum discussions, which was not feasible. To address this, we will host live sessions with instructors, providing needed instructional feedback for learners.

Though not without its problems, the blended learning did enable us to offer the institute with just one week of in-class time, making it accessible for learners who cannot afford a longer time commitment.
The case-study team activities served as a microcosm of a complex community context and offered a significant opportunity to see evaluation unfold in real life. As the case-based learning required team interactions and consensus building with strangers of varying experiences and motivations for taking the course, it created challenging interpersonal dynamics. Facilitators needed to appreciate the intricate nature of the activity and resolve interpersonal challenges and conflicts while guiding group collaboration. Though facilitators had subject-matter expertise in evaluation, their main role was to navigate group dynamics and keep the teams moving forward.

Future training will equip facilitators with scripted statements about respecting group process in group decision making, and we will encourage them to communicate explicitly about their role as guides to, and co-creators of, the case-study team, rather than as subject-matter experts. In a constructivist-informed classroom, knowledge co-creation is the responsibility of everyone: learners, facilitators, and key informants. Facilitators do need to know when to interject to prevent disengagement, power dynamics, or inactivity among learners and the key informant. Lastly, introducing the case-study group to one another and to the key informant prior to class time can build camaraderie and help prevent interpersonal struggles.

**Intersectoral and interdisciplinary teaching and learning**

In alignment with its constructivist pedagogy and addressing the needs of diverse learners, UEval departed from the “sage-on-the-stage” instructor model to allow students to learn from two co-instructors, five facilitators, a CES representative, and four guest speakers. Students reported this diversity of expertise and teaching styles as a course highlight. UEval enrollment fostered constructivist ways of learning—learning from and with each other. Evaluation skill levels varied highly, and the intersectoral community partners represented a wide variety of not-for-profit and public sectors. This is crucial, since varied skills, experiences, and perspectives are needed for meaningful group discussions and learning experiences, and it was made possible by the absence of a course prerequisite. This also meant that among the large number of learners were some who possessed minimal or no prior knowledge of evaluation; this might have rendered co-learning daunting for individuals and teammates. In the future, reducing the number of students may help address this.

Alongside co-learning, some students engaged in professional networking, sharing contacts for future student volunteering, practicums, and/or thesis projects.

**UEval learning evidence**

Learner assessments provided ample opportunity for individual and group reflection. Final presentations enabled learners to demonstrate their new evaluative competencies to colleagues, facilitators, and instructors. Peer assessments allowed learners to reflect on the work they had co-created and gave them a collectivist, constructivist mindset. All learners completed the pre- and post-CES
competencies questionnaires, which provided an opportunity to reflect on how their course learnings related to CES competencies. The individual reflection assignment required learners to discuss two altered competencies. While some learners talked about gains, especially in technical and interpersonal domains, many reflected on unanticipated decreases in competency. This was a function of recognizing that they had initially overstated their competencies and now had a more realistic view, reflecting a deeper appreciation for the nuances of evaluation. The reflection also asked students to comment on their key learnings and experiences in the group process.

UEval also provided the opportunity for self-directed learning and group work, with students given two weeks after the institute to reflect on whether and how to revisit their group’s plan as they prepared their final assignments. This assessment also benefited the community partners, as they received a few versions of the final plan with ample and relevant information.

A final, significant legacy of UEval is learner participation in a community of practice of like-minded individuals seeking evaluator training.

CONCLUSION

We have described the pilot of a community-engaged evaluation institute that integrated competency-based curriculum with an experiential, co-learning teaching model. UEval brought community members and their community-informed cases into the university classroom to foster collaborative and mutually beneficial learning that would not have been achieved otherwise. When university and community members meet to co-learn around community-based cases, beyond disciplinary and sectorial boundaries, they bring diverse perspectives about complex problems. Results indicate the success of the UEval model in enhancing perceived learner competency gains, which will prepare them for effective professional practice and build their evaluation capacity. Reinforcing the teaching model of UEval as relevant and useful to evaluator education, recent scholarship emphasizes the benefits of competency-based evaluator education (Poth et al., 2020) and highlights the significance of practical and contextual competency gains (Garcia & Stevahn, 2020). Ongoing research about UEval will support the refinement of this evolving model and contribute to the sparse literature on evaluator education based on empirical evidence (King & Ayoo, 2020). This model can be employed in teaching contexts and disciplines beyond evaluation, such as psychology, nutrition, and allied health, which can benefit from an experiential component to help learners understand concepts more fully.

REFERENCES


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Competency-Based Evaluation Education: Four Essential Things to Know and Do

Cheryl Poth
University of Alberta

Michelle Searle
Queen’s University

Abstract: Evaluator education must provide robust opportunities to support and assess the progressive, lifelong development of relevant knowledge and skills. If we wish to keep pace with the increasingly complex contexts in which evaluators operate, we need to better align our educational approaches with the global movement toward practice competencies guiding the profession. Key among the challenges is the lack of instructional guidance specific to a competency-based approach to evaluator education. In this practice note, we orient readers to the value of competency-based evaluation education and describe the teaching context using a systems perspective to examine the dynamic learning interactions and experiences. We advance four essential instructional features of the competency-based approach revealed by a study documenting the impacts on learning and student experiences. We conclude with lessons learned from reflecting upon our experiences during the development and implementation of a competency-based doctoral-level evaluation course to highlight the mutual benefits for learners and instructors.

Keywords: competency-based learning, evaluator education, instructional guidance

Résumé : La formation des évaluateurs et évaluatrices doit offrir de bonnes occasions d’appuyer et d’évaluer le développement progressif et continu des connaissances et des compétences pertinentes. Si nous voulons suivre l’évolution des contextes de plus en plus complexes dans lesquels les évaluateurs et évaluatrices travaillent, nous devons mieux centrer nos approches pédagogiques sur le mouvement mondial en faveur des compétences pratiques qui orientent la profession. L’un des principaux défis à relever est le manque de directives pédagogiques précises liées à une approche de formation fondée sur les compétences. Dans cette note sur la pratique, nous sensibilisons les lecteurs et lectrices à la valeur de la formation en évaluation fondée sur les compétences et décrivons le contexte de l’enseignement en utilisant une perspective systémique pour examiner les interactions et les expériences d’apprentissage dynamiques. Nous présentons quatre caractéristiques pédagogiques essentielles de l’approche axée sur les compétences révélées par une étude documentant ses impacts sur l’apprentissage et les expériences des
Global demand exists for the practice of evaluation (Nielsen et al., 2018), as well as for effective pedagogical approaches supporting the personalized and developmental progression of relevant knowledge and skills over a lifetime as a professional evaluator within a changing world (Chappell et al., 2003). But while incorporating competencies into evaluation coursework can enhance learners’ skills, knowledge, and abilities (Stevahn et al., 2005), evaluation-specific instructional guidance is lacking. In this practice note, we describe the lessons we’ve learned in the form of four essential instructional practices, revealed by a recent study of learners’ experiences and outcomes during a competency-based doctoral-level evaluation course. We conclude with details about how the study informed subsequent course changes and future directions for this work.

**CONTEXTS SURROUNDING THE DEVELOPMENT AND IMPLEMENTATION OF THE COMPETENCY-BASED DOCTORAL-LEVEL EVALUATION COURSE**

Inspired by her experiences evaluating outcomes from a competency-based assessment system in medical education (e.g., Ross et al., 2009), the lead author (Poth) began to explore its potential in evaluation. A competency-based approach to evaluator education holds strong potential for addressing the need for robust opportunities supportive of the personalized and developmental progression of knowledge and authentic application of skills. Competency-based learning is described as an outcomes-based approach that challenges learners to assess their abilities, demonstrate achievement, and recognize areas for further learning (Frank et al., 2010). A competency-based approach is intuitive because incorporating competencies into evaluation coursework has long been recognized as useful for enhancing evaluation learners’ skills, knowledge, and abilities (Stevahn et al., 2005). There exists a global movement toward establishing competencies and professionalizing the evaluation profession, evidenced by the recent work of the task force of the American Evaluation Association and Japanese Evaluation Association, among others. It is important to note, however, the lack of consensus that surrounds this movement.

Canadian evaluators are especially well positioned to be global instructional pioneers because a necessary precursor to the approach—the identification of profession-specific competencies—has been in place for Canadian evaluators since 2010. A taxonomy of essential evaluation practice competencies has the potential to serve as a useful pedagogical framework for those teaching evaluation.
Gullickson and colleagues highlight the contribution of a common evaluation pedagogical framework as critical “so that all practitioners draw from a common pool of knowledge and embody accepted norms of conduct like principles and ethics, which are then communicated to groups outside the profession” (Gullickson et al., 2019, p. 9). The lead author’s experiences providing evidence of her evaluator competency as part of the credentialing program run by the Canadian Evaluation Society (CES) in 2011 spurred her initial development of a doctoral-level, competency-based evaluation course at the University of Alberta.

In the years since, this course has undergone several iterations. During implementation of the fall 2018 course, we undertook a formal examination of the experiences that learners attributed to their self-reported competency gains (for full study description see Poth et al., 2020). In the published mixed-methods study, we discussed seven novel insights generated by a systems-informed case-study methodology. This unique study approach more accurately represented the complex learning environments that naturally influence evaluator education outcomes. The key instructional and institutional systems influences, represented in Figure 1, included instructor and learner expectations, past teaching and learning experiences, interactions with other learners, and faculty course expectations and logistics. Everyone involved was influenced by the learning that occurred, the interactions with one another, and the dynamic societal and global contexts surrounding them. We recognized that individual learners’ prior experiences affect the elements of learning and contribute to individual differences in the types of connections that learners make with new experiences (Knowles et al., 2012). One key study outcome involved advancing the following definition guiding our current work:

A competency-based approach for evaluator education is an approach to preparing evaluators for real-world practice and supporting their lifelong development as evaluators organized around evaluator competencies derived from an ongoing analysis of societal needs. It is distinguishable by being learner-centred and focused on a time independent developmental learning progression of mastery (Poth et al., 2020, p. 14).

DESCRIBING THE COURSE DESIGN AND IMPLEMENTATION COMPRISING THE TEACHING CONTEXT

Designing and implementing a high-quality competency-based evaluation course requires alignment among course outcomes, course experiences, and course evidence, as depicted in Figure 2.

Our course logistics were constrained by the schedule of 13 weekly three-hour face-to-face classes, supplemented by online discussions and resources. Of particular note is the “backwards design” (e.g., Fink, 2013; Wiggins & McTighe, 2005) and “constructive alignment” (Biggs, 2014) approach to planning as the backbone of the competency-based evaluation course. This involves the instructor initially identifying the course outcomes, then determining acceptable course evidence, and then designing course experiences to support learners’ development of the competencies outlined as the course outcomes. For the 2018 course iteration
studied in the published report (Poth et al., 2020), the instructor identified 15 competencies from the initial framework CES (2018) as the course outcomes, four summative assessments as the course evidence (evaluation design, issue examination, discussion facilitation, and competency assessment and reflection), and four types of feedback-embedded instructional activities occurring in person and as the course experiences (large group discussions about community partnership development, small group review of work-in-progress for the evaluation design, instructor facilitation of real-world evaluation skill applications, and engagement with diverse perspectives through readings, guest speakers, and video links).

**OUR REFLECTION, LESSONS LEARNED, AND FOUR ESSENTIAL INSTRUCTIONAL PRACTICES**

The lessons we learned from reflecting upon the 2018 course implementation are organized into four essential instructional practices for those teaching or planning
to teach evaluation using a competency-based approach. We undertook a structured reflection of our findings from the 2018 course implementation, and these novel understandings begin to address the dearth of information about how the CES competencies influence the design and implementation of evaluator education in Canada (Galport & Azzam, 2017). Importantly, given that the availability of evaluation-specific term-length courses within Canada (CUEE, 2008) and beyond (Christie et al., 2014) remains limited, these insights and instructional guidance are broadly transferable across evaluation education opportunities to include workshops and short courses.

1. **Maintain relevancy of course outcomes with competency revisions within the evaluation profession to keep pace with real-world practice expectations.** Our findings suggest that learners recognized the assessments as generating evidence of their competency gains, and the course experiences as helping prepare them for success on the assessments. As the course was being implemented during fall 2018, the revised CES competencies were launched to reflect evolutions in the field. This highlights the need for our approaches to evaluator education to accommodate further revisions expected over time. We propose competency-based approaches that can easily accommodate revisions to the course outcomes and that can help learners and instructors stay current with the professional evaluator practice competencies necessary for the dynamic contexts in which evaluators are expected to operate.
2. **Scaffold experiential learning opportunities to navigate the messiness of real-world evaluation practice.** Over the past decade, while the course has undergone significant changes in response to learner feedback, the central role of experiential engagement with a community client to create an evaluation plan has remained. This experience involves rendering service without payment because the learner completes the evaluation design assignment toward course credit. Our findings suggest that behind-the-scenes support through class discussions and one-on-one instructor consultations provides an authentic yet supportive experience for learners working with their community clients. When learners have experiences in which they are supported as they navigate dynamic interactions, they are better able to bridge theory and practice in their work. This reflects and extends the well-established need for practical and hands-on experiences to complement more didactic approaches to developing the requisite complement of evaluator skills and dispositions in an applied field (e.g., Chouinard et al., 2017; Chelimsky, 1997; Fitzpatrick, 1994). We propose that competency-based approaches can generate evidence of developing the complex skills necessary for real-world evaluation practice by assessing different combinations of individual competencies in the assignments.

3. **Create opportunities for learner-centred choice to enhance engagement in their own evaluation learning.** Our findings consistently revealed the importance, from the learners’ perspective, of opportunities for pursuing areas of personalized interest and goals. Specifically, learners referred to their choice in selecting the community partner for the evaluation design and defining an issue topic examined in another assignment as helping them to reach their own goals for the course. It is not surprising that engaging learners more actively in their own learning is beneficial, and that choice helps. This highlights the need for learners to have opportunities to take responsibility for their own learning as lifelong professionals in realistic evaluation practice contexts involving the interplay among people, program, politics, and the environment (Alkin et al., 2012). We propose that learners direct their own learning as a key tenet of competency-based approaches, positioning novice evaluators for the lifelong learning they will be expected to engage in as evaluation professionals.

4. **Promote metacognitive practices to build learners’ awareness of their own learning progression.** To support the elaboration of metacognition, we embedded self-reflection on learners’ own competency development into the final assignment; our findings suggest that learners demonstrated the ability to self-assess progress and identify areas for further development. When these emerging understandings are discussed within established communities of practice, such as with peers and instructor in the course environment, all learners can benefit. It is not surprising that
reflection helps learners build awareness of their own learning. The theoretical foundations of experiential learning include the work of Dewey, Piaget, and Vygotsky. At the centre of this work is the use of reflection and active participation to make sense of lived experiences. Dewey’s (1933) statement that not all experience results in learning highlights the contribution of high-quality reflection on course experiences. Similar to the work of Chouinard et al. (2017), our study highlights the learning advantages afforded to novice evaluations from authentic learning opportunities and a competency-based approach with access to ongoing feedback as core characteristics with the strong potential to contribute to reflective practices.

COURSE CHANGES AND FUTURE DIRECTIONS FOR THIS WORK

Based on our reflection and informed by the formal examination of the 2018 course implementation, we made changes to the 2019 course design and implementation that have not been discussed elsewhere. First, we adopted the revised 2018 CES competencies to reflect evolving practice needs and expanded the number of competencies identified as course outcomes to 23 of the 36 Canadian Evaluation Competencies (CES, 2018) across the five evaluator practice domains (see Table 1). We grappled with how many competencies to include as course outcomes and decided to categorize them as primary and complementary (see Appendix for list). This expansion of course outcomes was informed by learner-reported developments in competencies beyond what the instructor initially identified in the 2018 course iteration. Course design was again structured using “backwards design,” starting with the end in mind (Fink, 2013).

The change in learner outcomes had a ripple effect on revisions to the course assessments (see Table 2) and to the course experiences supporting their development. (See Appendix for how each course assessment was designed to generate evidence of different combinations of the individual competencies representing the intended course outcomes, and notice the emphasis on the competency “Uses self-awareness and reflective thinking to continually improve practice” across all four assessments.) This enhanced role of reflective practice is apparent across the revised assignments, including, for example, through the inclusion of an explicit learning plan in the initial competency assessment that also creates more explicit opportunities for learners to articulate their course goals and how they hope to achieve them.

A similar, expanded emphasis on the competency “Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all” as a primary course outcome reflects a focus on scaffolding experiential learning opportunities to navigate the messiness of real-world practice. The enhanced role of scaffolding is apparent across the experiences embedded within the course, for example, through the inclusion of feedback opportunities throughout the course on design
drafts from the community partner, instructor, and peers using both online and in-person interactions.

In closing, this practice note provides a glimpse into what is often inaccessible when planning, implementing, and assessing a teaching innovation, with insights related to four essential instructional practices for those implementing a competency-based approach to evaluation education. Designing effective competency-based evaluator education requires understandings of who the learners are, how to facilitate meaningful interactions among those involved in the course, what practical experiences optimize individual and collective growth potential, and how to assess evidence of complex learning outcomes. When such skills are in place, both learners and instructors can benefit from the continuing development and improvement of effective, competency-based learning environments. Our course changes reflect our own experiences as evaluation educators and graduate-student supervisors and point to the essential role of contextualized community experiences and engaging in reflective practice in preparing

<table>
<thead>
<tr>
<th>CES competency practice domains</th>
<th>Description of CES practice domain focus</th>
<th>CES competencies (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflective</td>
<td>Knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.</td>
<td>8 3</td>
</tr>
<tr>
<td>Technical</td>
<td>Strategic, methodological, and interpretive decisions required to conduct an evaluation.</td>
<td>10 7</td>
</tr>
<tr>
<td>Situational</td>
<td>Understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.</td>
<td>7 5</td>
</tr>
<tr>
<td>Management</td>
<td>Applying sound project management skills throughout the evaluation project.</td>
<td>6 3</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>Social and personal skills required to communicate and interact effectively with all stakeholders.</td>
<td>5 5</td>
</tr>
</tbody>
</table>

36 23

*Targeted refers to identification as a learner outcome during instructional design and as assessed by course assignments; however, additional competencies may develop.

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Table 2. Revised 2019 course evidence describing four summative assessments

<table>
<thead>
<tr>
<th>Summative assessments</th>
<th>Purpose</th>
<th>Process</th>
<th>Weighting %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation design and presentation</td>
<td>Convey, in writing and orally, an evaluation design that meets the needs and contexts of a community partner.</td>
<td>The learner has the option of working with a peer to co-create an evaluation plan with embedded opportunities to seek feedback on design drafts from the community partner, instructor, and peers.</td>
<td>35</td>
</tr>
<tr>
<td>Issue examination and discussion lead</td>
<td>Convey, in writing, knowledge related to an evaluation-practice issue of interest to the learner, and lead an interactive discussion.</td>
<td>The learner selects a practice issue within a more general evaluation topic to create a post, including background grounded in literature, experiential connections they may have, and three questions stimulating online peer discussion. They chose a week to post, manage peer responses, and lead a class debrief.</td>
<td>25</td>
</tr>
<tr>
<td>Initial competency assessment and learning plan</td>
<td>Convey, in writing, background influences to competency self-assessment and a plan for course learning.</td>
<td>The learner completes an initial competency assessment at the beginning of the course, reflects about the background influencing the assessment, and creates a learning plan.</td>
<td>15</td>
</tr>
<tr>
<td>End-of-course competency assessment and reflection</td>
<td>Convey, in writing, key factors that influenced their development of evaluation practice competencies.</td>
<td>The learner completes a pre-course competency assessment and reflects on their own specific evaluation competency gains and creates a narrative reflection.</td>
<td>25</td>
</tr>
</tbody>
</table>
evaluators for the realities experienced in the field (Poth et al., 2017). We draw upon our combined decades of pedagogical and evaluator educator experience in our recent implementation study and subsequent course changes. This has resulted in crystallization of our learning, which allows us some degree of confidence to elucidate the four instructional practices. We offer the following “take-away” messages for evaluation instructors to keep in mind in their own pedagogical practice when using competency-based approaches:

- use backward design in your planning of course outcomes, evidence, and activities;
- embed opportunities for your learners to build awareness of themselves and their learning through reflective practice;
- facilitate reciprocal learning environments that draw upon diverse perspectives of those involved in your course and course materials; and
- create your course assessments to embed choice and measure several competency outcomes so that they are personalized and target more complex skills.

Competency-based approaches in evaluation offer great potential for keeping pace with the increasingly complex contexts in which evaluators operate and with the professional competency frameworks, and they encourage lifelong learning. We anticipate that future research will generate further evidence of the effectiveness of competency-based approaches across diverse evaluator education contexts.

REFERENCES


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### APPENDIX

#### Table A1. Revised 2019 course outcomes measured by summative assessments

<table>
<thead>
<tr>
<th>Learning outcomes: Competencies for Canadian evaluation practice (CES, 2018)</th>
<th>Summative assessments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Evaluation design and presentation</td>
</tr>
<tr>
<td>Reflective practice domain</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Knows evaluation theories, models, methods, and tools, and stays informed about new thinking and best practices</td>
<td>✓</td>
</tr>
<tr>
<td>Integrates the Canadian/US Joint Committee Program</td>
<td>✓</td>
</tr>
<tr>
<td>Evaluation Standards in professional practice</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Uses self-awareness and reflective thinking to continually improve practice</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Technical practice domain</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Clarifies the purpose and scope of the evaluation</td>
<td>✓</td>
</tr>
<tr>
<td>Assess program evaluability</td>
<td>✓</td>
</tr>
<tr>
<td>Clarifies the program theory</td>
<td>✓</td>
</tr>
<tr>
<td>Frames evaluation topics and questions</td>
<td>✓</td>
</tr>
<tr>
<td>Develops evaluation designs</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Uses appropriate evaluation methods</td>
<td>✓</td>
</tr>
<tr>
<td>Identifies data requirements, sources, sampling, and data collection tools</td>
<td>✓</td>
</tr>
<tr>
<td>Situational practice domain</td>
<td>✓  ✓  ✓</td>
</tr>
<tr>
<td>Examines and responds to the multiple human and natural contexts within which the program is embedded</td>
<td>✓</td>
</tr>
<tr>
<td>Identifies stakeholders’ needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity</td>
<td>✓</td>
</tr>
<tr>
<td>Respects all stakeholders and strives to build and maintain trusting relationships</td>
<td>✓</td>
</tr>
</tbody>
</table>

(Continued)
### Table A1. (Continued)

| Learning outcomes: Competencies for Canadian evaluation practice (CES, 2018) | Summative assessments |
|---|---|---|---|---|
| | Evaluation design and presentation | Issue examination & discussion lead | Initial competency assessment and learning plan | End-of-course competency assessment and Reflection |
| Identifies and responds to changes in the context of the program and considers potential positive and negative impacts of the evaluation | ✓ | | | |
| Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all | ✓ | ✓ | ✓ | ✓ |
| Management practice domain | | | | |
| Provides leadership to the evaluation project | ✓ | | | |
| Defines work parameters, plans, and agreements for the evaluation | ✓ | | | |
| Uses group management and facilitation skills | ✓ | | | |
| Interpersonal practice domain | | | | |
| Uses communication strategies appropriate to the cultural, linguistic, social, and political contexts | ✓ | ✓ | ✓ | ✓ |
| Demonstrates effective and appropriate written and visual communication skills | ✓ | ✓ | ✓ | ✓ |
| Demonstrates effective, appropriate, and respectful verbal and non-verbal communication skills | ✓ | ✓ | | |
| Uses a variety of processes that result in mutually negotiated agreements, shared understandings and consensus building | ✓ | ✓ | | |
| Builds partnerships within the evaluation context | ✓ | | | |
| Others possible depending on ... | | | | |
| Number of competencies assessed | 23 | 7 | 5 | 5 |

Note: A checkmark (✓) represents assignments through which all learners may progress in the associated competency. The larger, bolded checkmarks represent the primary course outcomes with the other checkmarks as complementary.
The Role of Evaluative Thinking in the Teaching of Evaluation

Thomas Archibald
Virginia Tech

Abstract: In this practice note, I share some reflections on the role of evaluative thinking in the teaching of evaluation. I teach an introductory graduate-level evaluation course to Master’s and doctoral students, and I provide Evaluation Capacity Building (ECB) workshops to various community-based education organizations, non-governmental organizations, non-profits, foundations, and groups of emerging evaluators. In this practice note I use a reflective case study augmented with analysis against salient theoretical frameworks to reflect on evaluative thinking as a way to balance teaching theory and practice; infuse adult education principles and practices, which can also help learners hone in on the potential for evaluation for social justice; and equip students for continuing professional development—helping them become lifelong learners in evaluation.

Keywords: evaluation capacity building, evaluative thinking, practical wisdom, reflective practice, teaching of evaluation

Résumé : Dans cette note sur la pratique, je partage certaines réflexions sur le rôle de la pensée évaluative dans le cadre de l’enseignement de l’évaluation. Je donne un cours d’introduction à l’évaluation pour les étudiantes et les étudiants à la maîtrise et au doctorat, et j’offre des ateliers sur le renforcement des capacités en évaluation à diverses organisations communautaires éducatives, à des organisations non gouvernementales, à des organismes à but non lucratif, à des fondations et à des groupes d’évaluateurs et d’évaluateurs émergents. Dans la présente note sur la pratique, j’utilise une étude de cas de façon réflexive, avec une analyse fondée sur des cadres théoriques reconnus, pour réfléchir à la pensée évaluative comme façon d’équilibrer la théorie et la pratique d’enseignement ; comme composante des principes et des pratiques de l’éducation permanente, ce qui pourrait aussi aider les apprenantes et les apprenants à reconnaître le potentiel de justice sociale de l’évaluation ; et comme outil de perfectionnement continu des étudiantes et des étudiants, qui les aidera à continuer l’apprentissage de l’évaluation durant toute leur vie.

Mots clés : renforcement des capacités d’évaluation, pensée évaluative, sagesse pratique, pratique réflexive, enseignement de l’évaluation

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The purpose of this practice note is to share some reflections gleaned through my dual role teaching evaluation to graduate students and facilitating evaluation capacity building (ECB) for program implementers. Specifically, I focus on the role of evaluative thinking in the teaching of evaluation. As a faculty member in the United States in the Agricultural, Leadership, and Community Education department of Virginia Tech, I teach an introductory graduate-level evaluation course called “Evaluation of Extension and Outreach Programs” to Master’s and doctoral students. I also provide ECB workshops to various community-based education organizations (such as the Cooperative Extension system), non-governmental organizations, non-profits, foundations, and groups of emerging evaluators.

The approach I use in this practice note is a reflective case study augmented with analysis against salient theoretical frameworks (i.e., pre-existing thought traditions that are well placed to help us better understand evaluative thinking and explore its application in the teaching of evaluation). I reflect on evaluative thinking as a way to balance teaching theory and practice; infuse adult education principles and practices, which can also help learners hone in on the potential for evaluation for social justice; and equip students for continuing professional development—helping them become lifelong learners in evaluation.

First, before introducing the “what” of evaluative thinking, I briefly consider some practical differences between formal (university teaching) and non-formal (ECB) contexts, a distinction that, surprisingly, has not been thoroughly discussed elsewhere (McFadden & Williams, 2020). This distinction matters for this practice note because, I propose, evaluative thinking is salient and essential in the teaching of evaluation regardless of context, yet its operationalization and utility as a concept vary at least in part whether one is in a formal or non-formal context. As such, I mention a few germane considerations about those contextual differences here:

- **The professional role (current or future) of the learner.** Formal evaluation teaching tends to prepare emerging evaluators, or at least people whose professional roles are likely to include a strong dose of evaluation-related tasks, whereas non-formal ECB programs are more often tailored to program implementors who do not think of themselves as evaluators.

- **The centrality of evaluator competencies.** Formal evaluation teaching is likely to refer to and leverage explicit lists and descriptions of evaluator competencies, such as the Canadian Evaluation Society competencies (https://evaluationcanada.ca/competencies-canadian-evaluators; see also: Buchanan & Kuji-Shikatani, 2014; Dewey et al., 2008; Galport & Azzam, 2017; Ghere et al., 2006; Gullickson et al., 2019; LaVelle, 2019), as a pedagogical roadmap or guidepost, part of the enculturation of learners into the professional world of evaluation. In an ECB context, in contrast, the full gamut of evaluator competencies is likely too much to include, and might overwhelm and intimidate the learners.
• **The use of a syllabus.** Formal evaluation teaching relies on a syllabus, whereas ECB contexts are more often based on an agenda for a workshop or workshop series. Both establish learning objectives, but they tend to vary in both form and content. Where and how evaluative thinking content and approaches show up in the learning plan thus vary accordingly.

• **The duration and depth of training.** Formal evaluation teaching ranges from one or two semesters of coursework through a full degree in evaluation and is characterized by a relative breadth and depth of topics, usually a practicum project, and an expectation that the learner will master many technical and conceptual aspects of evaluation. ECB contexts, on the other hand, while hopefully longer and more in-depth than just a one-off workshop (Preskill & Boyle, 2008), still tend to be shorter and less comprehensive than formal programs.

• **The role of grading and credit.** Formal evaluation courses are graded and confer academic credit on the learner, whereas ECB, like most professional development, is not graded and does not lead to academic credit (though micro-credentialing, “badges,” and the like are increasingly used). As such, the dynamics of intrinsic and extrinsic motivation of the learner tend to vary across these contexts, which also has implications for how evaluative thinking is approached.

Below, I refer back to these distinctions to suggest how and why evaluative thinking has a role in both teaching and training contexts.

**WHAT IS EVALUATIVE THINKING?**

Evaluative thinking is an ancient practice, much older than the field of professional evaluation. According to Scriven (2013), it likely emerged along with the evolution of early hominids around 2.25 million years ago—a perspective also reflected in Campbell’s (1974) evolutionary epistemology (specifically the “Evolution of Epistemological Mechanisms” variety), as well as in House’s (2015) interpretation of Kahneman’s (2011) dual-system theory of cognition: “evaluative thinking plays a huge role in the ‘fast and slow’ dual process model of thinking” (pp. 17–18), which Kahneman traces to the origins of evolutionary development.

The concept of evaluative thinking, however, has not been carefully or widely discussed in the literature until relatively recently. What is evaluative thinking? From their perspective as practitioners and researchers of ECB, Buckley et al. (2015) have defined it as

critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and informing decisions in preparation for action. (p. 378)
This definition’s alignment of evaluative and critical thinking raises the question of how and to what extent those two types of thinking differ. Critical thinking has been defined as a cognitive process of reappraising ideas and thoughts in order to make more informed decisions and actions (Brookfield, 2012). Scholars such as Schwandt (2018), Vo et al. (2018), and others have further differentiated evaluative and critical thinking by aligning evaluative thinking more explicitly with the logic of evaluative reasoning, foregrounding the essential place of evaluative thinking in the fundamental yet often neglected or obfuscated evaluative synthesis step—whereby the evaluator marshals evidence in service of a value claim. As I discuss below in relation to my reflective case study, the existence of these differing yet overlapping and related perspectives on evaluative thinking helps make the case for why it is such an important concept in the teaching of evaluation. From both perspectives, evaluative thinking is key to helping learners grasp that “evaluation is a disposition and worldview” (LaVelle & Donaldson, 2015, p. 40), an essential element of “being an evaluator” (Podems, 2018).

BALANCING TEACHING THEORY AND PRACTICE

In my course and in my ECB programs, learners are understandably eager to learn the “how to” of evaluation, the technical know-how and skills necessary to be a competent evaluation practitioner. This is usually what gets them in the door. They want to know how to make a good survey or logic model, or how to do qualitative and quantitative analysis. As important as these technical competencies are, they remain secondary to understanding the conceptual and even philosophical underpinnings of evaluation practice. That is why the textbook I use (Mertens & Wilson, 2018) begins with an in-depth study of the major branches of evaluation and their concomitant paradigmatic assumptions—on epistemology, ontology, and axiology as well as methodology. And it is why Schwandt (2015) has written repeatedly and convincingly about his “longstanding concern that training in technique in evaluation must be wedded to education in both the disposition and the capacity to engage in moral, ethical, and political reflection on the aim of one’s professional undertaking” (p. 9). To use Schwandt’s (2015) phrase, this has to do with “cultivating a life of the mind for practice.” It is about practical reason, which “values embodied responsibility as the resourceful blending of critical intelligence with moral commitment” (Sullivan & Rosin, 2008, p. xvi). This is closely aligned with House’s (2015) notion of practical wisdom—skilled evaluators use clinical expertise to “recognise patterns, perceive and frame situations, draw on intuition, deliberate on available courses of action, empathise, balance conflicting aims, improvise, make judgments and act in ways appropriate to the time and circumstances” (Astbury, 2016, p. 64). McDavid et al. (2019) and Houle et al. (2018) have also discussed the importance of practical wisdom, or phronesis, for an ethical evaluation practice, touching as well on the question of how evaluator education and ECB can help develop such practice wisdom.
In my course and ECB programs alike, I use the notion of evaluative thinking to intentionally and explicitly foreground practical wisdom in evaluation. In class, for the first meeting of the semester, I use a “scenario analysis” activity adapted from Brookfield’s (2012) work on teaching for critical thinking to help students identify and question assumptions. I also interweave discussions and readings not normally associated with evaluation—such as Biesta (2010) and Law (2004)—alongside Mertens and Wilson’s (2018) introduction of paradigmatic assumptions to help students expand their frames of reference as to which theoretical and philosophical considerations can contribute to good evaluation practice. In ECB programs, whenever the context permits it, I include a section on using evaluative thinking to rethink what counts as credible evidence in program evaluation (see Archibald, 2019; Donaldson et al., 2014). Almost without fail, the majority of ECB participants engage enthusiastically and even passionately with this topic—as if these ideas had been bouncing around in their heads (i.e., the seeming irrationality and injustice of favouring some types of evaluation evidence over others a priori) but they just lacked access to the “academic” backing for such ideas. Including such a session in an ECB program helps participants go beyond the technical side of evaluation capacity to reflect more explicitly on the politics of knowledge in their own evaluation and program planning work.

INFUSING ADULT EDUCATION PRINCIPLES AND PRACTICES: THE CRITICALLY REFLECTIVE EVALUATOR

The ECB literature and, to a somewhat lesser extent, the teaching of evaluation literature both draw on andragogy as well as pedagogy. Chaplowe and Cousins (2016), for example, have a section on adult learning in their book, Monitoring and Evaluation Training: A Systematic Approach, while Preskill and Boyle (2008) discuss “adult learning (e.g., social constructivism, transformational learning, experiential learning), [and] workplace learning (e.g., situated learning, transfer of learning, and incidental, informal, formal learning)” (p. 449) as part of their multidisciplinary model of evaluation capacity building. More than ten years ago, Oliver et al. (2008) discussed the andragogy and pedagogy informing their multifaceted framework for teaching evaluation. That framework was designed to build on the strengths of self-directed adult learners, using three approaches: “cooperative learning, active learning, and self-directed learning” (p. 331).

In this same way, Archibald et al. (2018) explore the intersection of adult learning and evaluative thinking, drawing on “insights from critical adult education rooted in critically reflective practice and critical theory” (p. 109). Reflecting on my experiences as a teacher and facilitator, equipped with these theoretical lenses on the intersection of andragogy and the teaching of evaluation, I find that evaluative thinking is indeed a powerful framework for helping learners tap into the praxis of adult learning (either explicitly or implicitly) as they learn evaluation.
Archibald et al. add two important elements to their theoretical perspective on this overlap, both of which have real implications for the practice of teaching evaluation: adult education’s liberatory potential, and adult education (plus evaluative thinking) as a catalyst for reflective practice.

Adult education has a long (though often neglected) tradition of helping adults gain critical consciousness about the power-laden forces that influence their lives (Brookfield & Holst, 2011; Freire, 1970). As for evaluation,

Evaluation is not only, or even most importantly, a matter of method and design. It is also inherently and fundamentally a matter of politics and values. This is because evaluation is politically located in social contexts; it is both shaped by the political relationships and power dynamics that characterize a given context and, in turn, influences the contours and future character of these relationships. (Greene et al., 2004, p. 97)

Thus, the explicitly critical and value-driven roots of adult education and evaluation can emerge and comingle in classroom (or workshop) discussions and activities framed by evaluative thinking.

In terms of reflective practice, Archibald et al. (2018) have introduced a framework for understanding how evaluative thinking promotes reflective practice on four interrelated levels within evaluation practice. Since teaching and training in evaluation should ideally prompt critical reflection among all learners, this framework can serve as a guide for practice as teachers and facilitators choose activities and topics to encourage reflection. The four levels are macro, meso, micro, and meta. The macro level pertains to reflections on the role of evaluation (and of the evaluator) in society at large. In class or in a workshop, here one can pose explicit and direct questions such as these: Why are you studying evaluation? Why are you an evaluator? How do you envision evaluation contributing to meaningful change in the world through your work?

The meso level pertains to evaluator competencies, to “one’s awareness of evaluation expertise and needs for growth, including knowing oneself as an evaluator, assessing personal needs for enhanced practice, and engaging in professional development toward that goal” (Stevahn et al., 2005, p. 52). This is a question of professional development, and thus it is highly salient to the conversation about the teaching of evaluation. The micro level pertains to the day-to-day practice of evaluation, whereby evaluators engage in reflection-in-action (Argyris, 2004) and operationalize their practical wisdom. As such, this level of reflection links back to the conversation on values, social justice, and critical praxis. The final level, meta-reflection, has to do with reflection on the three other levels, what we are able to do in practice notes such as this.

Perhaps most importantly, evaluative thinking as a catalyst for reflective practice in the teaching of evaluation can equip students for continuing professional development in evaluation—to help them become life-long learners in evaluation, supported by various communities of practice.
LESSONS AND IMPLICATIONS

To conclude, it seems only appropriate for me to practice a little evaluative thinking and meta-reflection on the reflections shared herein, summarized in a succinct list of lessons and implications for the practice of teaching evaluation. One line of questioning is in regard to the practical implications of the differences between formal (university teaching) and non-formal (ECB) contexts introduced above. I believe that, as my theory-informed case reflections suggest, evaluative thinking has a major role in both teaching contexts. In formal contexts, it can be connected to almost all parts of the syllabus, in line with the various lists of evaluator competences and guiding principles (especially the ones linked to reflective practice, the common good, etc.). Activities focused on evaluative thinking can be used as a way to kick off the semester, or to help students process paradigm debates. On the other hand, in ECB workshops, even if the competencies are not explicitly part of the conversation, the facilitator can use evaluative thinking as a way of structuring the agenda, since it is a rather ubiquitous concept once you begin using it as a framework or lens. Some specific ways in which these lessons and implications for the practice of teaching evaluation can be operationalized include the following:

- unpacking specific competencies, guiding principles, and steps in the evaluation process to discuss and identify the ways in which evaluative thinking is represented or manifested therein;
- doing a scenario analysis activity adapted from Brookfield’s (2012) work on teaching for critical thinking to help students identify and question assumptions;
- engaging in dialogic critical reflection on paradigmatic assumptions, including the methodological question of what counts as credible evidence, facilitated via reading vignettes or doing a role play applying different paradigms to a common case;
- connecting to learners’ existing reservoir of experience with everyday evaluative thinking, augmented by a deeper examination sparked by guiding questions (e.g., Brookfield’s critical conversations protocol, etc.); this pedagogical approach also foregrounds the role of values and valuing in evaluative thinking; and
- journalling based on the four levels of critically reflective practice for evaluators as described in Archibald et al. (2018).

In conclusion, from my experience across varied and numerous cases of teaching or training on evaluation, evaluative thinking has provided a through-line of thought and action to help demystify theory and remystify practice (Lederach et al., 2007), highlight the value-laden and social justice implications of the work, and call into question problematic assumptions about evidence, methods, power, and the very role of evaluation in society. That is why, from my standpoint, I have found that evaluative thinking has an essential role in the teaching of evaluation.
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Praxis Makes Perfect? Transcending Textbooks to Learning Evaluation Experientially and in Cultural Contexts

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Abstract: The theory-to-practice loop is riddled with gaps, incongruencies, and, at times, trauma when it comes to the professional development and practice of evaluators. Our current system of professional development for evaluators systemically and institutionally reinforces racism, white privilege, and misogyny, thus re-creating harm and the barriers that so many BIPOC and LGBTQ2S evaluators are working hard to overcome. This article provides the reader with an alternative to the field’s valuing and learning evaluation within “institutions of higher education” and other “formal” and “scholarly” learning spaces. Rather, it provides for a balanced approach of experiential learning in the field and within cultural contexts as a much-needed professional design component for developing responsive, effective, and transformative evaluators. Praxis and experience should have at least equal value, merit, and worth for developing current and upcoming evaluators. When done correctly, wisdom to evaluative thinking, development, and practice happens, and not simply reinforcing and generating the same evaluative voices, constructs, and behaviours of the privileged evaluation patriarchy.

Keywords: anti-racist evaluation, BIPOC evaluators, culturally responsive evaluation, equity evaluation, evaluation praxis, evaluator professional development, Indigenous evaluation

Résumé : Le cheminement de la théorie à la pratique est ponctué de lacunes, d’incongruences et, parfois, de traumatisms lorsqu’il est question du perfectionnement et de la pratique des évaluateuses et évaluateurs. Notre système actuel de perfectionnement de ces personnes renforce systématiquement et institutionnellement le racisme, le privilège blanc et la misogynie, reproduisant donc les préjugés et les obstacles que bien des évaluateuses et évaluateurs PANDC et LGBTQ2S travaillent sans relâche à surmonter. Le présent article offre aux lectrices et aux lecteurs un point de vue alternatif sur la valeur accordée à l’évaluation et sur l’apprentissage qui en est fait dans le domaine, au sein d’« établissements d’enseignement supérieur » et autres lieux de formation « officiels » et « savants ». Plutôt, il est question d’une approche équilibrée à l’apprentissage expérientiel dans le domaine et dans le cadre de contextes culturels, comme composante indispensable de design professionnel

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pour la formation de personnes réactives, efficaces et transformatrices. La praxie et l'expérience devraient au moins se voir accorder une valeur et du mérite équivalents pour la formation de professionnelles et professionnels chevronnés et débutants. Avec suffisamment de soins, la réflexion, le développement et la pratique de l'évaluation peuvent évoluer de façon positive, sans simplement renforcer et générer les voix, les concepts et les comportements du patriarcat privilégié de l'évaluation.

Mots clés : évaluation antiraciste, évaluatrices et évaluateurs PANDC, évaluation culturellement réactive, évaluation équitable, praxie de l'évaluation, perfectionnement des évaluatrices et des évaluateurs, évaluation autochtone

As evaluators, we must find new pathways to wisdom, not more expressways to information generation, something evaluation continues to be so deeply engaged in. Information is often ordinary and mostly uneventful. Wisdom is life-changing, life-saving, and transformational. When I asked an Indigenous elder how we described evaluation using our language and traditional knowledge, he told me, “It was a matter of life or death. Books can’t argue back” (D. Turney, personal communication, April 17, 2003). For me as a self-proclaimed “blue collar scholar,” learning in context to apply the latest or most popular evaluation theories and/or methods has been an ongoing experiment for over two decades. As a traditional and Indigenous person who expresses my racial and cultural identity as an active evaluation scholar and practitioner, this continual theory-to-practice loop has been challenging when working with evaluators and institutional partners. However, using praxis and experiential knowledge in the natural environment to balance and speak back to the academy where theory and method are learned in an artificial environment (e.g. university setting, professional development classroom, or from a publication) has proven helpful for teaching and learning evaluation. This practice note will speak to both contexts.

First, the field of evaluation privileges scholarly knowledge and academics over experiential knowledge and the field practice of evaluation practitioners conducting direct evaluations within community contexts. One only needs to review journal publications, journal editorial boards, evaluation association boards, and plenaries, keynotes, and presidential-sponsored sessions to see the overrepresentation of certain groups and institutions and the underrepresentation or complete absence of others (Shanker, 2019). At times, you will see more Indigenous content and author representation in non-journal sources (e.g., white papers, grey literature, conference compendiums, and other trade or virtual publications), but these do not hold as much weight in academia or with the gatekeepers of evidenced-based policy making and practice. Oral history and Indigenous theories or practices are often considered cultural folklore and thus are trivialized, racialized, or dismissed as unsophisticated in ways that devalue or exclude Indigenous ways of knowing and living from permissible evidence in Western literature (Shopes, 2007). In the Western context, evidence is valid only if it is published and employs certain theories and methods or calls upon
certain scholars or institutions to generate that evidence. Therefore, evaluation continues to be a well-paved political and pedagogical pathway for the privileged (Parkhurst, 2017).

Second, the identity politics of evaluation is a high-profile and highly contested space. From the who’s who of evaluation theorists listed on a single rootless evaluation theory tree (Alkin, 2012), the white, privileged, and fragile remain predominant. These prevalent voices continue to be the loudest and most resistant to critical assessment of their own approach. As a result, the BIPOC and other underrepresented voices raising the related topics of historical and present institutionalized and systemic oppression are the most missing in evaluation literature and the most traumatized by white and privileged scholars and leaders. BIPOC, and Indigenous in particular, should be overrepresented in order to be visible, active, and equitably resourced so that the methodological and other challenges seen in the field of evaluation can begin to be addressed. The field of evaluation can begin to acknowledge and transform the roots of these injustices and inequities by addressing the power that continues to hold these harmful and traumatic patterns in place.

Changing this harmful dynamic needs to happen in three contexts: education, practice, and behaviour of evaluators. The ways in which evaluation is taught and the valuing or devaluing of where it is taught need to be critically and urgently reflected and acted upon. How evaluation is theorized, taught, and transmitted through practice and scholarly activities needs to directly address privilege, decenter it, and destabilize and eradicate the marginalization harm of the non-privileged. The behaviour of evaluators needs to leave behind the bankrupt idea that a Western academic and capitalistic perspective is neutral. It is harmful and does not treat all ways of knowing as equally valid and valuable evidence. Evaluation as a field must get real and deepen its own critical analysis, allowing it to work more respectfully and effectively with BIPOC and underrepresented communities. Stop producing information that serves individuals and their agendas and pivot to supporting the collective wisdom of our field.

Transformative changes can begin with the education of evaluators and among the faculty and instructors teaching evaluation. Learning how to acknowledge and address issues of white privilege, racism, injustice, and oppression should be required as a foundational priority for any faculty member or leader teaching evaluation theory and method. We must start with the origin stories or roots of racism, sexism, classism, and other doctrines of discovery and/or conquest that still are firmly entrenched in the legal underpinnings of policy and the human practices that perpetuate injustice. Knowing origin stories of oppression will reveal to evaluation students how we participate in these systems so that we can begin to deconstruct and dismantle them. To ignore or exclude this from academic instruction about evaluation simply makes the modern-day academic, policymaker, or practitioner commit the same trauma and injustice as their ancestors did. Teaching about systems of oppression and how evaluators and evaluation can build something new and better is a solid step forward.
In terms of evaluation praxis, critical examination of self-awareness and historical understanding and addressing the intended or unintended consequences of being a white and/or privileged evaluator or evaluation organization are essential. White allies must address these domains if transformative and sustainable improvements are ever to happen in the field of evaluation. Observation and listening should come first given the centuries of dominance, conquest, and poor outcomes or impacts on marginalized groups. “Whitesplaining” (centring a white, male, and/or privileged position to provide thought leadership or evidence-based practices without regard to other populations) or “evalsplaining” (talking generally or theoretically about evaluation practice as applicable to all without lived experience in context, a.k.a generalizability) simply needs to stop.

The field of evaluation itself can also do much to raise practitioners’ awareness of their own perspective and address the ways in which systemic oppression/privilege affects how they work. Privileged evaluators should hold space for and value the intellectual and practical strengths and contributions of BIPOC and underrepresented populations as a necessary part of the broader field of evaluation. Assure the adequate resourcing for BIPOC evaluators to create and lead studies and contribute to evaluation “thought leader” gatherings. White, male, and/or privileged evaluators can engage in self-reflective practices (e.g., book clubs, panels, publications, plenaries, etc.) about their power and position (and how that contributed or contributes to systemic and institutional injustice, or how it has reversed these trends). More VOPE (Voluntary Organization for Professional Evaluation) professional development offerings focused critically on the meaning and impact of being white, male, and/or privileged as an evaluator would be helpful (e.g., webinars, workshops, evaluation institute offerings, courses, etc.). Content development and delivery of anti-racist, anti-capitalist, and decolonized curriculum, texts, and syllabi by those in power and privilege are desperately needed. Be the change and live that change in your academic and teaching practices.

Evaluators must also address academic and professional gatekeepers, imposters (LaVelle et al., 2018), and conquerors of any colour or intersection. Theoretical considerations about merit and weakness of evaluations, especially regarding Indigenous populations, need to be contested given the fictionalized version of society that predominates (Gagnon, 2013), a privileged view that is also reflected in the unjust and harmful actions of individuals, institutions, and systems in the field of evaluation. “Colonization through evaluation” is alive and well; it exists through procurement policies and monetary or other awards, data access (or lack thereof), broken or dysfunctional networks, and roadmaps and governance-based global efforts that still deny Tribal/First Nations governments and Indigenous scholar practitioners a place at the evaluation table (AEA, 2016). We sit at the mercy of the legal, political, institutional, and evaluative courts of our conquerors with little recourse or acknowledgement by evaluation colleagues or other nation-states involved in global evaluation and sustainability initiatives. Ma te Rae (EvalIndigenous Inaguaral Global Evaluation Conference, hosted by Ma Te Rae – Aotearoa/
New Zealand VOPE, February 2019) and the Canadian Evaluation Society are leading the way. But when will a VOPE be led by a sovereign Tribal/First Nation government? There are 1,208 sovereign Tribal/First Nations governments in North America to choose from. Yet they are left out by other VOPEs and international nation/states involved in the work of EvalPartners, EvalParliamentarians, and other global initiatives. The methods and strategies of non-Indigenous need to change to the ethical, professional, and practical inclusion of sovereign Native nations.

LITERATURE CONSIDERATIONS

This practice note focuses on praxis rather than literature for two reasons: one, the academic focus on “knowledge production” discounts or even leaves out the lived experience of both evaluators and participants in the projects they are evaluating; and two, much evaluation literature also is lacking in the perspectives of BIPOC scholars. Constructions of and contributions to knowledge are often about power, access, and praxis when it comes to educating adults (Mattsson et al., 2008). Evaluation is most often produced and represented by the highest valued evaluation theorists, scholars, and practitioners—most of whom are of European, male, and heterosexual identities and of relatively high socio-economic status. This systemic and compounding problem isn’t getting better by apologetic, ignorant, racist, or romanticized methods. The systematic flow of benefits, resources, access, opportunities, compensation, and power into an institutional system that rewards the white and privileged needs to be brought into balance. And those in power and who are teaching the next generation of evaluators bear the greatest responsibility.

Evaluation pedagogy, praxis, and the education of evaluators create and influence our practices and knowledge production within the field of evaluation. None of the professional development offerings for evaluators in the United States offer professional development certificates or credentials, undergraduate degrees, or graduate degrees in culturally responsive evaluation (Lavelle, 2018). Most of these programs are taught by non-minority faculty and staff from Western institutions. No Tribal Colleges and Universities (TCUs) data sets were included in the study and the minority serving (MSI) or historically black colleges and universities (HBCU) could not be identified through data stratification. We need to know more, and the methods of design, developing partnerships, and complexity systems need to be part of the required strategy.

Using critical evaluation development frameworks and critical evaluative thinking as an applied domain of social inquiry could be restorative and effective. However, there needs to be a professional, political, and resource commitment for this critical work. Efforts and collaborative partnerships are showing small, but encouraging, changes within the field. Examples include Culturally Responsive Evaluation and Assessment Conference, Hawaii-Pacific Evaluation Conference, EvalIndigenous and the global Indigenous evaluation conference (Ma te Rae Evaluation Association), and AEA’s Graduate Diversity Education Initiative. VOPEs
like the Canadian Evaluation Society and Ma Te Rae Evaluation Association (Aotearoa/New Zealand), are all examples of global evaluation organizations led or co-led by Indigenous and Tribal/First Nations people or with direct influence on developing current and future evaluators and evaluation thinking, content, policies, and practices. More educational offerings by evaluation organizations and initiatives are putting culturally responsive, equitable, and inclusive evaluation at the forefront of their strategic activities. The methods and means to do this work exist if you have the professional motivation to look for them.

Decolonizing your cognitive and other constructs is an important method to incorporate. A colonial/privileged assumption is that the evaluator’s position is neutral or objective. Being white, male, and/or privileged affects who you are and what you bring to evaluation. In a recent New Directions in Evaluation (NDE) issue on Evaluative Thinking, Vo and Archibald (2018) present a thought-provoking call on evaluators to consider how we “think when we are evaluating” as a space to reflect on how evaluative thinking is a central construct to the work of evaluators (p.7). Truly, more on this topic needs to be explicitly shared within the evaluation community so that we can unpack our cognitive reasoning to critically and pragmatically share what is going on in our heads. Who we are as individuals, our life experiences (i.e., praxis), and what we are thinking about affects what we value and bring to any aspect of evaluation activities. On the flip side, evaluative thinking can also reveal what we do not know, do not value, and are not aware of, as well as what we do not have lived experience of (i.e., praxis). This kind of self-analysis can make us aware of how we do, or do not, value and utilize experiential knowledge in natural settings, as an example of values we may not typically consider as part of how we do our work or as part of professional and pedagogical development and knowledge production in evaluation.

Cognitive and metacognitive constructs can be a method to learn, unlearn, and relearn together as an evaluation community. Cognitive theory can be used to dismantle the conqueror (Western) model where dominant and colonial ways of thinking, categorization, privilege, and knowledge. These often go unchecked because they are uncritically considered the norm for what is right and just, despite the complete lack of acknowledgment of how power and dominance were ill-gotten in the first place (Newcomb, 2008). We must know origin stories in order to understand where we are presently and how we got here, so we can use them as an impetus for a fresh consideration of new ways to go forward together in evaluation more effectively, responsively, and responsibly. We can utilize the methods suggested by Vo et al. (2018), who ask us to share the shortcomings and assumptions of the literature (e.g., “an ideal society from a western perspective”) and the silences of the literature (e.g., “is it possible that evaluative thinking may manifest differently in the context of cross-cultural evaluation where norms and value systems do not converge in the same way . . . . unfortunately the literature is silent on this issues because nonwestern views are underrepresented in our data set,” p.39). These reflective and critical methods are the first steps on the practical and rigorous journey we all should be on.
ENGAGED AND EVALUATIVE LEARNING METHODS IN CONTEXTS OF PRACTICE

The power and ethics of knowing methodologically demonstrate epistemic injustice and academic exploitation are always present. Inadequate resources, absence of intentional policies and activities to counterbalance systemic privilege, and marginalization or oppression of BIPOC offer examples to support this assertion. Epistemic injustice is “wrong done to someone in their capacity as a knower in the form of testimonial injustice (prejudice causes a hearer to give a deflated level of credibility to a speaker’s word) and hermeneutical injustice (when a gap in collective interpretive resources puts someone at an unfair disadvantage when it comes to making sense of their experiences)” (Fricker, 2007, p. 1). Academic and/or epistemic exploitation is not just a concept but a daily lived reality for marginalized groups. Frequently, this experience includes the privileged expecting the marginalized to educate them about the nature of their oppression (Dotson, 2014). This needs to immediately be changed.

Recently explained in detail by Robin DiAngelo (2018), “white fragility” arises out of privileged people being unaware of how greatly their daily lived experience differs from the lived experience of BIPOC and oppresses them, and becoming emotionally upset when confronted with this knowledge. One of the effects of this is the privileged not only failing to critically examine their own attitudes and experiences but asking BIPOC to do that work for them. The emotionally draining and uncompensated nature of this expectation is often invisible to the oppressor and is exploitative and traumatic to the oppressed. Additional resources to address the mental, emotional, and practical labour placed on them by the default disbelief or ignorance of the oppressor/privileged is real. The field must counteract these injustices and ensure that we are not recreating or producing new trauma for BIPOC and underrepresented evaluators. Our methods must be inclusive, adequately resourced beyond standard expectations and efforts, and valued through active participation and academic reconciliation. BIPOC and underrepresented scientists should be valued as integral to what the field does, not put in the margins, at the back of the room, or as inconvenient but PC and a silently resented add-on by the oppressors.

An NDE issue on the Pedagogy of Evaluation (Patton, 2017) provides us with personal methodological strategies to self-examine and avoid causing harm in evaluation pedagogy, thinking, and behaviours. We are reminded that there is “no singular or monolithic pedagogy of evaluation” (p. 9). Patton and the authors of this 2017 NDE publication suggest to the field of evaluation a critical social justice approach based on Pedagogy of the Oppressed (Freire, 2002), a seminal work outlining methods of teaching people to look critically at the systemic power dynamics that maintain inequality. Making the direct connection between inequality, social justice, and evaluation is critically needed in our field of work. This explicit stance recognizes that both the evaluator and the evaluation bring some type of methodological valuing to the practice of evaluation. By studying what we teach evaluators and how we teach it, we can critically unpack and examine which
content, knowledge, experiences, ethics, and values are most utilized. Those who teach evaluation pedagogy and publish on how to find and generate evidence not only greatly influence evaluative thinking but have some of the greatest effects on healing and transforming the field of evaluation as a whole.

Teaching evaluators cultural and scientific content knowledge of BIPOC scholars is a critical way to influence evaluative thinking and doing equitably and regeneratively. What is learned must not be misappropriated or stolen. It belongs to the BIPOC scholar and the communities of traditional practice they birth their responsible scholarship from. Traditional knowledge, worldviews, thinking, philosophies, and practical and experiential knowledge are earned in natural settings as part of a kinship where cultural, spiritual, and personal development happens and eventually can be responsibly shared. Methodologically our expressions are through the lived experiences and realities of Indigenous people, communities, and Tribal/First Nations. Timeless knowledge is found within the oral history of Indigenous peoples and communities, all of which have helped us survive postcolonial contact and impacts of contemporary Western societies. All this good methodological and other medicine continues to happen despite the history of cultural, linguistic, land, and human genocide of Indigenous people (Bowman, 2018).

In conclusion, traditional Indigenous evaluators and culturally responsive evaluation offers evidence of how we are having an impact upon the field. Teaching Indigenous evaluative thinking, theory, and responsive methodological practices to our non-Indigenous partners has been an effective approach to the professional development of non-Indigenous evaluators for decades (Bowman et al., 2015). Expanding this practice more broadly and applying these educational strategies has implications not only for saving the planet (United Nations IPBES, 2019) but also for restoring humanity, justice, and equity to evaluator development happening inside and outside the academy.

REFERENCES


AUTHOR INFORMATION

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Establishing and Developing Professional Evaluator Dispositions

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Brigham Young University

Abstract: A basic principle associated with competent evaluation practice asserts that evaluators should possess the education, abilities, skills, and experience needed to undertake the tasks proposed in an evaluation. For those training evaluators this also means teaching professional dispositions, because an individual’s dispositions (i.e., beliefs and values) influence how they will act as professionals. Personal dispositions held by individual evaluators at times conflict with the values and beliefs of their professional organization. Competent evaluators must be able to manage personal dispositions in ways that allow professional values and positions to guide their practice. In order for evaluation educators to teach evaluator competencies, we must understand the underlying dispositions associated with each competency. We must also identify which dispositions are essential for professional practice. This article discusses the issue of dispositions and the challenges of helping evaluators develop positive professional dispositions.

Keywords: evaluator training, evaluator competencies, professional dispositions

Résumé : Un principe de base associé à la pratique compétente de l’évaluation stipule que les évaluatrices et les évaluateurs devraient avoir la formation, les capacités et l’expérience nécessaires pour mener à bien les tâches d’une évaluation. Pour les personnes chargées de former des évaluatrices et des évaluateurs, cela signifie aussi enseigner des dispositions professionnelles, parce que les dispositions d’une personne (p. ex., ses croyances et ses valeurs) ont un effet sur son comportement professionnel. Les dispositions personnelles des évaluatrices et des évaluateurs peuvent parfois être en conflit avec les valeurs et les croyances de leur organisation professionnelle. Ces personnes doivent être en mesure de gérer leurs dispositions personnelles d’une manière qui permet aux valeurs et aux prises de position de leur profession d’orienter leur pratique. Afin d’enseigner les compétences d’évaluation, il est important de bien comprendre les dispositions sous-jacentes à chaque compétence. Il est aussi essentiel de reconnaître les dispositions qui sont essentielles à la pratique professionnelle. Le présent article discute de la question des dispositions et des défis liés au développement, par les évaluatrices et les évaluateurs, de dispositions professionnelles positives.

Mots clés : formation en évaluation, compétences en évaluation, dispositions professionnelles

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Most evaluation organizations state in their codes of conduct, professional standards, guiding principles, and lists of evaluator competencies that evaluators should conduct evaluations in a competent manner (American Evaluation Association [AEA], 2018; AEA Evaluator Competencies Task Force, 2017; AES, 2013; AOTEROA, 2011; Canadian Evaluation Society [CES], 2018; UK Evaluation Society [UKES], 2013; United Nations Evaluation Group [UNEG], 2008; World Health Organization [WHO], 2013). The American Evaluation Association (AEA) asserts in its guiding principles that “evaluators should possess (or ensure that the evaluation team possesses) the education, abilities, skills, and experience appropriate to undertake the tasks proposed in the evaluation” (AEA, 2018). And like many evaluation organizations, the Australian Evaluation Society (AES, 2013) declares in its professional learning competency framework (AES-PLCF) that it is dedicated to providing education and training in all matters related to professional evaluation practice.

For the most part, evaluator competencies focus on the knowledge, skills, and abilities an individual might need in order to conduct a successful evaluation. However, the competencies identified by evaluation organizations worldwide are not solely skills- and knowledge-based; many are attitudinal dispositions and beliefs. The United Kingdom Evaluation Society (UKES, 2013), for example, includes in its evaluation capabilities framework (UKES-ECF) what it calls qualities and dispositions, referring to characteristics and attitudes that enable evaluators to function professionally. Likewise, the European Evaluation Society’s (EES, 2015) evaluation capabilities framework (EES-ECF) lists specific dispositions and attitudes as essential competencies for professional evaluation practice. Those organizations that do not specifically use the term dispositions in their professional standards and evaluator competencies include expectations and competencies that are based on specific attitudinal dispositions.

Many evaluation educators have long believed that professional evaluators need professional dispositions (Gephart & Ingle, 1977). Davidson (2004) suggested evaluators need to develop an evaluation attitude (see also Patton, 2008); she recommended that evaluation organizations should work toward defining the boundaries of evaluator education, setting criteria and standards, and conducting formative assessments of competencies, in an effort to help each evaluator improve their capabilities. This includes developing professional evaluator dispositions.

The purpose of this article is to explore the issue of professional evaluator dispositions. It articulates the importance of gaining consensus concerning essential dispositions, understanding which evaluator competencies might be considered dispositional, and distinguishing between personal and professional dispositions. Examples of how various organizations manage the issue of identifying essential dispositions, assessing dispositions, and regulating its members are provided. In addition, the challenges of training evaluators when the goal is to teach evaluator dispositions are discussed, as well as methods that evaluation educators might use for helping students develop professional dispositions.
DEFINING THE TERM DISPOSITION

Words often have different meanings for different people. Academics are well known for using language that has specific meaning within their field but that is either poorly understood or used differently elsewhere. As the idea of a disposition is central to the discussion presented in this article, a working definition and explanation of the term are provided prior to discussing the importance of dispositions within the field of evaluation.

The dictionary definition of a disposition refers to inherent qualities of mind and character. A person’s innate disposition can refer to one’s predominant or typical mental and emotional temperament (e.g., a positive or happy disposition); however, in the context of evaluation and this article, dispositions refer to a person’s state of mind, tendencies, and inclinations that affect the perspectives one has toward the practice of evaluation. These are attitudinal dispositions rather than innate personality traits.

Unlike knowledge, skills, and abilities, attitudinal dispositions describe an individual’s values, beliefs, and opinions. Anderson and Bourke (2000) explained that affective characteristics like dispositions must involve feeling (typical and deeply held beliefs or attitudes), be targeted toward something (e.g., one’s feelings about culture, ethics, or the purpose of evaluation), and vary in degree or magnitude for different individuals (i.e., the potential for individuals to have more or less positive or negative feelings about something).

Knowledge, skills, and ability typically fall in the cognitive domain. Dispositions, although in the affective domain, also have a conative component in that these personal characteristics are not only associated with feeling, beliefs, and opinions, but also involve free will and agency (Davies, 2009). While not dispositional in nature, many valued skills and abilities have dispositional aspects associated with their development and practice.

Fishbein and Ajzen’s (1975) theory of reasoned action posits that attitudes toward social norms affect an individual’s behaviour. According to the theory of planned behaviour, people typically align their behaviour with their personal belief systems, taking into account how they believe others would perceive their actions (Ajzen, 1991). Thus, the observed actions of professional evaluators are influenced by one’s dispositions. Central to this concept is the recognition that an individual may be capable of performing specific skills and may understand important concepts but still choose to act in ways we might not expect due to his or her deeply held beliefs.

One criticism of accepting dispositions as a basis for professional competencies is the fear of indoctrination (Anderson & Bourke, 2000)—forcing people to think a specific way against their will. Indoctrination is not inherently malicious. Although often associated with negative connotations, to indoctrinate originally meant to familiarize individuals with the doctrines (i.e., norms and values) of an institution or profession, with no implication that agreement with these norms and values would be forced. At issue is whose values and perspectives are being promoted and whether the associated dispositions are desirable and essential.
to evaluation practice. This becomes an issue when personal and professional dispositions differ.

Professional dispositions refer to attitudes and beliefs valued by a particular organization, as opposed to personal dispositions, which describe an individual’s values, beliefs, and attitudes. An organization’s code of conduct often maintains the stance that professionals in a field of endeavour are expected to manage personal dispositions in ways that allow professional values and positions to guide their behaviour (e.g., AEA, 2018). Foundational to this idea is the assertion that individuals have the right to form and hold their own values, beliefs, and opinions; but when one is employed in professional practice, one must conform behaviourally to the organization’s beliefs and positions. It is therefore incumbent on professional organizations to carefully identify and articulate those attitudinal dispositions essential to professional practice.

THE RELATIONSHIP BETWEEN DISPOSITIONS AND EVALUATOR COMPETENCIES

While not always explicitly stated, many skills and abilities valued by evaluators have dispositional aspects associated with their development and practice. For example, the American Evaluation Association’s (2018) evaluator competencies (AEA-EC) do not include the term dispositions; they frame the competencies as behaviours (e.g., the competent evaluator acts ethically). However, acting ethically is based on core values like trustworthiness, respect, fairness, caring, and doing what is right. For many competencies, the underlying disposition associated with a specific competency is clear, but not always. An associated dispositional stance may be widely accepted as an important professional expectation, or competent individuals within the field may fervently dispute the value and importance of the specific disposition and thus the competency. Exploring the relationship between specific competencies and their associated dispositions is important for evaluators in general, but particularly for those involved in evaluator training. To properly teach evaluator competencies, we must understand the nature of these competencies and the underlying dispositional assumptions and challenges associated with each. The following discussion of a few specific dispositions is provided to illustrate dispositional connections along with the challenges and issues associated with each.

Ethics

The most common expectation and competency found in every evaluation organization’s list of competencies is that of ethical behaviour.

When considering this competency, evaluators seem to value the professional behaviour of acting and interacting ethically as essential to professional practice. On this point, the original competencies drafted by the AEA Evaluator Competencies Task Force (2017) included the expectation that evaluators act ethically in all five domains. Results of a survey designed to gauge the perspectives of AEA
members showed that 80-90% of respondents considered ethics important (see Table 1). Acting ethically was later removed from all but the professional practice domain as it was deemed sufficient to include it in the professional practice domain only; however, the results from the 2017 survey version affirm the declared importance of the expectation to evaluation professionals.

On the surface, ethics seems to be valued; however, these positive results might have been influenced by a social response set: Individuals are more likely to say something is important when they feel it would be politically incorrect to say otherwise. In addition, several respondents (approximately 48) considered ethics only moderately important or not important at all. In general, there is considerable agreement that acting ethically is an important expectation of professional evaluators, but not all agree. At least they do not all understand or value ethics the same (Morris, 2011). In fact, people from different countries and cultures often view ethical behavior very differently (Luegenbiehl & Clancy, 2017). Acceptable behaviour in one location may be seen quite differently in another.

In practice, evaluators may indicate they believe acting ethically is important and still act unethically (Davies, 2009; Morris, 2009). In accounting, a specialized field of evaluation, the Chartered Institute of Management Accountants (CIMA, 2015) and the American Institute of Certified Public Accountants (AICPA, 2014) suggest that professional ethical behaviour involves integrity, objectivity, and compliance with accounting standards and principles, as well as discretion and confidentiality. This seems reasonable. However, these and other professional organizations realize they have a problem with unethical behaviour (Culiberg & Mihelič, 2016; Henle et al., 2005), leading to calls for universities and training organizations to teach ethics (Aultman & Whipkey, 2019; Bazerman & Tenbrunsel, 2011).

For evaluator educators who attempt to teach ethics, it is easy to explain and test a student’s understanding of ethical principles and professional codes of conduct but difficult to determine whether a student personally values these standards and will demonstrate moral and ethical behaviour when working unsupervised.

### Table 1. Results from evaluator competencies survey regarding professional ethics

<table>
<thead>
<tr>
<th>Domain</th>
<th>Ethics competency</th>
<th>Survey results regarding importance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Extremely</td>
</tr>
<tr>
<td>Professional</td>
<td>Act ethically</td>
<td>85%</td>
</tr>
<tr>
<td>Methods</td>
<td>Act ethically</td>
<td>88%</td>
</tr>
<tr>
<td>Context</td>
<td>Act and interact</td>
<td>84%</td>
</tr>
<tr>
<td>Planning</td>
<td>Act ethically</td>
<td>83%</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>Act ethically</td>
<td>84%</td>
</tr>
</tbody>
</table>

Note. Based on AEA Evaluator Competencies Task Force (2017); N = 1215.
in the profession (Dutson et al., 1997). Not only does acting ethically require an understanding of what acting ethically means (Morris, 2011), professional behaviour is influenced by one's attitude toward the ethics expectation, as well as how strongly someone values acting ethically within specific situations and contexts.

**Cultural competence**

Another important attitudinal disposition entrenched in most sets of evaluator competencies is the expectation that evaluators understand, respect, and account for cultural aspects of any evaluation they conduct. In fact, the Aotearoa New Zealand Evaluation Association (ANZEA) competencies have been developed with an explicit focus on culture (Wehipeihana et al., 2014). They are ensonced within and informed by the Māori culture and traditions. Likewise, the AES-PLCF (AES, 2013) includes a domain focused on the attention to culture, stakeholders, and context. The UKES-ECF (UKES, 2013) and the EES-ECF (EES, 2015) expect evaluators to demonstrate cultural sensitivity and gender awareness.

The AEA-EC (AEA Evaluator Competencies Task Force, 2018) are based in the belief that professional evaluation practice should be grounded in the Program Evaluation Standards, the Guiding Principles for Evaluators, and the official documents of the organization. Thus, for the AEA, their statement on cultural competence frames an expectation of competent evaluation practice. Several times within various domains of the AEA-EC, specific competencies refer to culture (see Table 2). In each case, the underlying disposition related to the competency is implicitly stated within the AEA’s statement on cultural competence.

Cultural competence is a disposition (AEA, 2011). It is a value-based perspective that many evaluation communities believe is worth nurturing. Being culturally competent indicates a positive dispositional stance toward the importance of culture. Being culturally competent involves an attitude toward culture that values diversity and respects the perspectives of those with different cultural experiences. To be culturally competent is not an attribute an evaluator obtains (like knowledge or skill); rather, it is a value the evaluator develops (Kirkhart, 2010). Demonstrating cultural competence requires more than knowledge and

<table>
<thead>
<tr>
<th>Domain</th>
<th>The competent evaluator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional practice</td>
<td>1.1 Respects people from different cultural backgrounds</td>
</tr>
<tr>
<td>Methodology</td>
<td>2.10 Collects data using culturally appropriate procedures</td>
</tr>
<tr>
<td>Methodology</td>
<td>2.11 Analyzes data using culturally appropriate procedures</td>
</tr>
<tr>
<td>Context</td>
<td>3.7 Clarifies diverse perspectives . . . and cultural assumptions</td>
</tr>
<tr>
<td>Planning &amp; management</td>
<td>4.2 Addresses aspects of culture in planning evaluations</td>
</tr>
<tr>
<td>Interpersonal</td>
<td>5.7 Facilitates constructive and culturally responsive interactions</td>
</tr>
</tbody>
</table>

Table 2. AEA evaluator competencies associated with the disposition of cultural competence

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awareness. It is demonstrated by the degree to which an individual accurately and respectfully represents diverse perspectives even when one disagrees, sometimes intensely, with the perspectives of others.

Certainly, not all evaluations have a cultural focus (in terms of race or ethnicity), and not all evaluators have a positive disposition toward culture and its importance. Still, competent evaluators do not disparage another’s culture or try to change the deeply held beliefs of others to conform to the evaluator’s beliefs and values. Having skill and knowledge (regardless of the strength of one’s disposition) will influence the degree to which culturally appropriate procedures are effectively implemented; however, the degree to which one is willing to implement culturally appropriate procedures is determined by that person’s attitude toward culture and the strength of the value she places on having a cultural focus in the evaluation. These dispositions are not learned; they are developed over time through dialogue, interaction, self-reflection and practice.

**The personal factor**

What Patton (2008) referred to as the personal factor is a disposition foundational for competencies involving evaluation use and capacity building (see Table 3). This disposition involves caring, interest, commitment, and enthusiasm for the evaluation process and the benefits of evaluation. Patton (2008) suggested that this disposition may be the most important explanatory variable in evaluation utilization. While most would agree that the personal factor is important, they may believe this for different reasons and to varying degrees. Some may advocate for evaluation use to ensure they will have work. On the other hand, they may believe that capacity building will threaten their job security. Others might value the evaluation process with a fervent belief that a properly conducted evaluation will contribute to improving individuals, organizations, and society. Still, many individuals complete evaluations and have evaluations completed for them without a positive attitude toward the benefits of evaluation. Like cultural competence, it is a belief that is developed over time.

**Interpersonal skills**

Many evaluator competency frameworks suggest the importance of evaluators having interpersonal skills. King and Stevahn (2013) asserted that anyone can develop good interpersonal skills and that the success of an evaluation is often determined by the evaluator’s ability to manage the personal dynamics of

<table>
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<tr>
<th>Domain</th>
<th>The competent evaluator</th>
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<tbody>
<tr>
<td>Professional practice</td>
<td>1.9 Advocates for the field of evaluation and its value</td>
</tr>
<tr>
<td>Context</td>
<td>3.8 Promotes evaluation use and influence in context</td>
</tr>
<tr>
<td>Planning &amp; management</td>
<td>4.9 Works with stakeholders to build evaluation capacity</td>
</tr>
</tbody>
</table>
an evaluation; on this point, very few evaluation practitioners would disagree. Interpersonal skills, however, are not dispositions; they are not fundamentally affective. Interpersonal skills do, however, have a dispositional component. A positive disposition toward the value of participatory evaluation is foundational for competencies in the interpersonal domain. And while not all value or conduct participatory evaluations, an evaluator is more likely to develop and use their interpersonal skills if they have a strong belief that building relationships, managing conflicts, and understanding differing perspectives are important. In addition, developing a perspective of empathy toward those involved is cited as an important dispositional influence for interpersonal skill development (Johnson, 2018). So, while having or gaining the ability to properly manage the interpersonal dynamics of an evaluation is not a disposition, dispositions related to these skills can both facilitate their development and increase the likelihood that individuals will use them.

CHALLENGES AND CONTROVERSIES WHEN IDENTIFYING ESSENTIAL DISPOSITIONS

Developing professional dispositions is important. However, there are considerable obstacles involved with gaining consensus regarding which dispositions are and which are not essential to the practice of evaluation. For some dispositions there is a general consensus regarding their pertinence to evaluation and their value for professional practice; however, people do not all agree on the importance or acceptability of every disposition. The following examples are provided to illustrate specific challenges and issues associated with accepting various dispositions as essential to evaluation practice.

Advocacy

Within the professional practice domain of the AEA-EC is a statement that a competent evaluator identifies how evaluation practice can promote social justice and the public good. Most people would agree that advocating for social justice and the public good is admirable. At issue are whether advocacy is evaluation or pseudo-evaluation (Stufflebeam & Coryn, 2014) and what constitutes promoting the public good (Patton, 1985; Schwandt, 2002). Social justice advocates are well represented in the AEA (Datta, 2002); however, the term social justice, like many evaluation terms, has variable meanings depending on who is using it and in what context it is being used. One common misconception is that social justice and cultural competence are the same. Some also incorrectly believe that there is one overriding value or belief regarding what constitutes being in the public’s best interest (Schwandt, 2002). Evaluation societies are not the only organizations to struggle with this issue. The following example from the field of education is provided to illustrate how they have struggled identifying acceptable dispositions.

In 2000, the National Council for Accreditation of Teacher Education (NCATE) introduced new standards for accrediting college and university teacher
preparation programs that included the concept of dispositions. The term disposition in this context was used to identify character traits, beliefs, and attitudes that teachers were expected to possess in order to be considered good teachers. NCATE incorporated the concept of dispositions with the expectation that a teacher’s dispositions should be taught and measured, defining requisite dispositions as “beliefs and attitudes related to values such as caring, fairness, honesty, responsibility, and social justice” (NCATE, 2002, p.53). This definition met with considerable resistance, largely due to the inclusion of the words social justice (Alsup & Miller, 2014; Powers, 2006).

In addition to the general concern that dispositions are difficult to teach and an individual’s true dispositions are even more difficult to assess (Roberts, 2006; Shussler et al., 2005), critics articulated several potentially problematic issues regarding the expectation that teacher certification or school accreditation be based on whether individuals have a specific disposition (Alsup & Miller, 2014; Powers, 2006). While most teachers agreed that certain professional dispositions would be acceptable, many took issue with including any disposition based on personal values or morals. They expressed concern over the likelihood that some dispositions have a variety of definitions and manifestations, often with ideological undertones. In addition, ethical and moral issues were raised regarding whether a teacher’s certification should be withheld if he was perceived as not possessing the proper dispositions on specific social issues (Alsup & Miller, 2014; McElroy, 2005; Powers, 2006; Will, 2006). Many felt that a “good teacher” could have specific opinions, beliefs, and values not aligned with those of other “good teachers.” In response, NCATE clarified its position by removing the term social justice from its list of required teacher dispositions, focusing on the following:

Professional attitudes, values, and beliefs demonstrated through both verbal and non-verbal behaviors as educators interact with students, families, colleagues, and communities. These positive behaviors support student learning and development. NCATE expects institutions to assess professional dispositions based on observable behaviors in educational settings. The two professional dispositions that NCATE expects institutions to assess are fairness and the belief that all students can learn. Based on their mission and conceptual framework, professional education units can identify, define, and operationalize additional professional dispositions. (NCATE, 2008, p.89)

For many, this gesture represented an important line that needed to be drawn to ensure that institutionalization of a term would not lead to negative unintended consequences, as often occurs (Ravitch, 2004). Teachers and principals in US public schools are expected to understand the deeper norms and values that determine the culture of a school (Huff, 2012). They must understand how dispositions can shape the rituals, traditions, ceremonies, and celebrations that symbolize what is important, valued, and significant (Deal & Peterson, 2009). However, for a teacher or principal to promote or advocate for a specific social agenda unrelated to the academic learning goals and objectives of the organization was seen as inappropriate in a public school.
As a result of this rather contentious debate, NCATE retreated to a more politically safe delineation of dispositions, practices, and expectations for teachers that encompasses and espouses non-controversial aspects of social justice: caring and fairness. While not all agree (Alsup & Miller, 2014), many teachers feel they have little influence on the root problems of social injustice in society; they are expected to work effectively with students of diverse backgrounds and socio-economic status toward clearly defined learning goals regardless of their personal beliefs on social issues. They feel their teaching should not be judged by their advocacy for or stances toward social justice issues. The current policy expects teachers to apply their knowledge, skills, and professional dispositions in a manner that facilitates student learning (NCATE, 2008).

This example is provided as an illustration of the controversial nature of some dispositions and the challenges that organizations face when attempting to identify essential dispositions pertinent to competent practice. With regards to promoting social justice and the public good, the ANZEA New Zealand evaluator competencies point out that no matter how well meaning or politically correct an evaluation might be, there will always be a tension between who is benefited from and who is marginalized by an evaluation (Wehipeihana et al., 2014). Two specific examples that demonstrate opposite positions on the appropriateness of advocacy in evaluation are the Chartered Institute of Management Accountants (CIMA, 2015) and the World Health Organisation (WHO, 2013). Each has a very different perspective on advocacy. CIMA views advocacy as an ethical threat; WHO sees it as an essential element to any evaluation. Both feel evaluators should be impartial and independent; however, while accountants view the evaluations they do as an objective task involving integrity and strict application of accounting principles and standards, WHO views advocacy for gender equity and human rights as crucial to almost all its health and development goals.

**Methods and evaluation purpose**

Disagreements regarding essential dispositions are not all based on social issues. Strongly held beliefs about evaluation approaches and methods have caused considerable controversy within evaluation (Alkin, 2012; Donaldson et al., 2014). While one of the expectations of professional evaluators is that we value diversity and respect others’ opinions and perspectives, we do not always do it well. We often say that we should respect others’ right to hold a divergent opinion, but too often we label emotionally charged opinions opposite to our own in a manner not so respectful nor accepting. In theory, we value diversity of thought and belief; in practice, we often encourage homogeneity of thought and values. We tend to believe there is a right way to think and act.

One particular disagreement among members of the AEA centered on what constitutes an appropriate evaluation design in situations where program effectiveness is central to the evaluation (Donaldson et al., 2014). Strongly held attitudes and opinions about best practice resulted in contentious debate. Well-articulated arguments were presented for and against the US federal government’s
proposed priority for using scientifically based methods (i.e., random controlled trials or RCTs) when evaluating educational programs. The question of whether RCTs should be designated as the “gold standard” for determining causal effects was debated enthusiastically. The issue of causation, renamed by some evaluators as impact with attribution, was a central concern in the AEA’s response to the proposed priority (AEA, 2003). In the end, the quant–qual wars subsided and a truce position endorsed the value of mixed methods. The third edition of the Joint Committee’s Program Evaluation Standards combined statements from the previous edition about quantitative and qualitative designs into one unified standard, emphasizing the expectation for quality evaluations to employ technically adequate designs and analysis appropriate for an evaluation’s purposes. A standard of reasoned justification was established rather than a methodological mandate.

This does not mean that an organization should never endorse a specific evaluation approach. For example, the World Health Organisation states in its evaluation guidelines that they value participatory approaches to evaluation that involve stakeholders at all levels (WHO, 2013). They believe that participatory evaluation approaches are best able to accomplish equity-focused evaluation. Recognizing the limitations of such approaches in terms of required resources, WHO suggests it may be necessary to balance the advantages of these approaches against resource availability. Given the organization’s purpose and values, establishing a specific dispositional stance towards a specific evaluation approach might be reasonable for them, but not for all evaluators. Which dispositions are deemed essential is something each organization must establish for itself.

**DEVELOPMENT OF DISPOSITIONS**

Personal dispositions emerge naturally as the result of one’s natural inclinations and exposure to applicable situations (Sasaki & Kim, 2017). Helping individuals develop positive professional dispositions is attempted in a variety of formal settings (LaVelle & Donaldson, 2015), but the pedagogy for teaching essential evaluator dispositions is considerably different from that used to teaching knowledge, skills, and abilities (LaVelle et al., 2020).

The goal of teaching students to value, appreciate, or develop a specific disposition can be a challenge. A prerequisite to teaching dispositions is coming to some agreement regarding which dispositions are and which are not essential to professional practice. Additionally, those who would teach professional dispositions must recognize that the notion that a disposition can be taught is likely an incorrect perspective. Dispositions are not taught; an individual develops her own beliefs, values, and opinions. The likelihood that an individual will develop a certain disposition can be enhanced through instruction and discussion, but individuals will determine for themselves what they believe and why that belief is or is not important. Attempting to persuade an individual that a specific disposition is needed does not guarantee that he will value that perspective. Dispositions develop over a lifetime and typically change by degree as an individual
gains experience and better understands the issues and consequences of acting a certain way.

There are several approaches that might be taken when attempting to help evaluators develop dispositions. One framework that describes the process and contributes to understanding dispositions is Bloom’s (1969) taxonomy for the affective domain (Krathwohl et al., 1964). This hierarchy describes five phases: receiving, responding, valuing, organizing, and internalizing. Receiving, responding, and organizing might best be described as process phases. Students are taught what the disposition is, they come to understand its particular components, and then they must resolve issues of practice. These phases are where instruction has the most influence. The valuing and internalizing phases could best be described as outcome phases. After learning about and reflecting on a specific disposition, students begin to value (or not value) that perspective. As individuals allow their developing dispositions to influence their behavior, they must resolve dissonance (e.g., practice vs. theory problems) to determine how they internalize the principle. Internalization shapes their decisions, affects their behavior, and governs their actions; for evaluators this phase might affect the evaluation approaches they choose and the way they perform evaluation tasks.

Figure 1. The cyclical process of Bloom’s taxonomy for the affective domain. Bloom’s taxonomy represents a cyclical process describing how dispositions are developed. It begins with receiving and responding, as students are provided explanations regarding what the disposition entails and are encouraged to ask questions about it. Within these phases, students are expected to gain a full understanding of the disposition. As a result of this process they will begin to form their beliefs and values. In the organizing phase, students will inevitably question the dispositions they hold as they attempt to resolve any dissonance they feel between what is expected of them and their personal beliefs and opinions. As they do this, their dispositions begin to take shape as an internalized way of being that guides actions and behaviours.
Receiving and responding phases

In the first two phases of this process, instructors make students aware of standards and competencies expected of practicing professionals. Instruction helps students know and understand what the professional standards are on a cognitive level. Various techniques and pedagogies can be used to do this. During this phase the most important part of the instruction is to explain the underlying dispositions associated with the standards or competencies. Students are taught why the standards exist and why the profession considers them important. The goal of instruction is to influence students to develop a positive attitude toward the standards and competencies.

For example, instructors may teach student evaluators what cultural competence is and how vital it is to value diversity. They may give students a copy of AEA’s Guiding Principles for Evaluators and stress the need for acting ethically. They should encourage students to ask questions about the standards and provide explanations to help them fully understand what is expected; students cannot gain an informed opinion about something if they do not have adequate information. However, understanding what is expected does not mean the students will consider all the standards important.

Valuing phase

Valuing is an outcome phase that does not involve instruction. After students have a basic understanding of a specific competency, they begin to form an opinion of its importance and value. A student may or may not have a positive disposition toward the standards or feel any strong need to develop specific competencies. To know what they will need or how they will act in specific situations, student evaluators may need more knowledge and experience (Johnson, 2018).

Organizing phase

Because personal dispositions are constantly being refined and developed, commonly an evaluator who understands the importance of a principle still acts contrary to it in specific situations. Perhaps the most important part of training evaluators is to help them resolve issues regarding inevitable dissonance between personal and professional standards (Morris, 2011). In the organizing phase, instructors must allow students to question a standard and explore the contextual aspects of an expectation. Instruction for this phase may take various forms, including role play, situation analysis, case studies, and reflection of practices. In many ways the students must be challenged to explore their true feelings and attitudes in light of the profession’s behavioural expectations.

In this phase instructors must be careful to avoid attempting to change students’ personal values and beliefs to conform with their own personal values or those of others in the profession. Instructors should emphasize understanding the standards and dispositions deemed essential for professional practice. For example, the Council on Social Work Education has identified 10 core competencies of
social work practice (Council on Social Work [CSWE], 2018). These competencies include the expectation that those who identify as professional social workers will conduct themselves according to the standards of the National Association of Social Workers Code of Ethics. Along with these core competencies comes the expectation that individuals recognize and manage personal values in ways that allow professional values to guide their practice. Thus professional ethics related to the principles of conduct are determined by the profession, not the individual.

Ethical dilemmas can involve situations where the decision on how to proceed or act is complicated by differences between one’s personal belief systems and the expected code of conduct. An individual behaves ethically in a profession by conforming to the accepted standards of the professional. So when the standard for social workers expects professional demeanour, not only in behaviour and communication but also in appearance, individuals are expected to defer to what the profession considers appropriate dress (appearance), not what the individual feels is appropriate. In professions like the American Nursing Association, the code of ethics is very precise regarding expectations for professional conduct. Many of these professions have a review of conduct procedure along with mechanisms for censuring those in the profession.

Considering social work, nursing, and evaluation, evaluation is the only one of the three that does not require a license to practice. But in each it is (or should be) acknowledged that individuals can act professionally and still have personal values or beliefs that do not align fully with the professionally approved dispositions and standards.

**Internalizing phase**

Like the value phase, internalizing is an outcome; but it may not be the final outcome. What we believe can change and often does over time. What we hope is that individuals will align their personal dispositions with those deemed important by the profession.

**ASSESSMENT OF DISPOSITIONS**

Assessing professional dispositions is challenging. A common criticism of the intended learning objectives adopted for many training programs is that they often focus (intentionally or otherwise) on lower-level learning objectives (remembering and understanding) or basic skill development. Assessed objectives typically ignore higher-level learning and affective learning objectives (Davies, 2009). Recognizing this weakness, the Accreditation Board for Engineering and Technology (ABET) established an expectation that engineering programs focus on 11 intentionally vague training goals based on Bloom’s (1969) taxonomy for the cognitive domain, adding an objective from the affective domain: valuation (Shuman et al., 2005). This addition expresses the expectation that students value, appreciate, or develop specific attitudinal dispositions. This expectation comes with specific challenges.
For example, expecting a student to appreciate and value the need to be a lifelong learner may be a worthy endeavour, but assessing this is a formidable challenge. Students may be able to articulate the arguments for such an attitude (knowledge and understanding), but educators may find it challenging if not impossible to determine how strongly a student holds a specific opinion (disposition or valuation).

Not all professions attempt to measure dispositions. For example, neither social work nor nursing attempts to assess the dispositions of their professionals (CSWE, 2018; National League for Nursing [NLN], 2008), being satisfied in knowing that those who work in the profession act in accordance with the profession’s code of conduct regardless of their personal views and beliefs (NLN, 2008). Those professions that do expect dispositions to be taught and assessed (e.g., education and engineering) have no way to measure dispositions in a valid or reliable manner. Dispositions are often difficult to define and poorly understood, and rarely do all experts agree on their importance. Obtaining an accurate assessment of an individual’s dispositions requires indirect measures using self-report or observations taken in an authentic situation over an extended period of time (Davies, 2009). These factors make it difficult to measure dispositions.

Because of the challenges involved with assessing dispositions, it may not be incumbent upon those training evaluators or for the profession in general to attempt this assessment. But even if we cannot measure one’s dispositions well, it is important that educators attempt to help students develop desirable dispositions essential to professional evaluation practice.

**DISCUSSION AND CONCLUSIONS**

Because dispositions influence how evaluators act as professionals (Ajzen, 1991; Anderson & Bourke, 2000; Fishbein & Ajzen, 1975), it is important for evaluation organizations to identify which dispositions are essential for professional practice. Given the diverse opinions of evaluators and ways evaluation is practiced, this can be a daunting challenge. For evaluator educators, it is also important to understand the underlying dispositions associated with each of the evaluator competencies identified as essential for competent professional practice so they can decide how best to help students develop professional dispositions.

While it is difficult to judge the quality of an evaluation (Patton, 1990), it can be even more difficult to identify the degree to which an individual evaluator possesses all the abilities, skills, experience, and dispositions required to be considered a competent evaluator. And while training does not guarantee that an evaluator’s work will be of high quality, the likelihood of avoiding mistakes will be increased with training and experience; this includes teaching new evaluators about professional standards as well as developing important evaluator dispositions.

Professional evaluators need professional dispositions (Gephart & Ingle, 1977); however, evaluators need more consistent agreement about which dispositions are
and which are not essential. Also, the profession needs to distinguish between professional dispositions and personal values, opinions, and beliefs. Ethical dilemmas occur when an individual's personal belief systems do not align with the profession's expected code of conduct. Ethical behavior in the profession is confirmed when an individual conforms to accepted professional conduct standards regardless of their personal convictions. Issues arise when some in the profession insist that practitioners must hold dispositions that are not essential to competent practice. When no agreement can be reached regarding whether a specific disposition is essential, a compromise standard based on reasoned justification is often warranted.

For many licensed professions, those identified as professionals are expected to conduct themselves according to the standards of the profession regardless of their personal values and beliefs. These organizations (e.g., nursing and social work) typically identify mandatory behaviors based on clearly delineated procedures deemed appropriate by research conducted by experts in the field. These professions recognize that dispositions are difficult to teach and measure. They also realize that people typically align their behavior with their personal belief systems (dispositions), but rather than attempting to change or measure personal beliefs, their training consists of explaining the desired professional behavior and the consequences of not acting appropriately.

Some professions that expect those who are licensed to hold specific dispositions (e.g., education and engineering), although they cannot adequately assess dispositions, assume positive dispositions when observed behaviors (e.g., interactions with clients) align with established best practices toward clearly defined goals. Teacher training, for example, often involves teaching students expected behaviors (e.g., knowledge and understanding) but also attempting to persuade those entering the profession of the importance of holding specific dispositions (e.g., all students can learn) (NCATE, 2008). In licensed professions, censure is a possibility if an individual’s behavior is deemed inappropriate.

Those identifying themselves as evaluation professionals are not currently required to obtain a license or certification to practice. They conduct evaluations in many different contexts and for many different purposes. While a few dispositions are widely accepted as essential (e.g., Patton's personal factor—having a positive attitude toward the value of evaluation), far less agreement has supported other dispositions (e.g., valuing specific methods for determining the effectiveness of a program). Consequently, training novice evaluators involves more than teaching them what is expected and what consequences will occur if expectations are not met. Competent evaluators must be able to manage personal dispositions in ways that allow professional values to guide their practice.

There is no one correct way to train evaluators, as there is no single correct way to conduct an evaluation. However, understanding dispositions is important for those wishing to teach evaluator competencies. Understanding dispositions requires recognizing that skills and abilities are not dispositions; they are, however, founded in specific dispositions (i.e., values, beliefs, and opinions). Dispositions
are not obtained by mastering a particular body of knowledge or set of skills. Teaching dispositions involves two important instructional steps: helping students fully understand what a disposition entails along with why the profession considers it important to competent practice, and allowing students to reflect on and resolve any dissonance they may feel between an expected professional disposition and their personal beliefs and opinions. Students must understand that the professional organization strongly advocates some dispositions and practices because they are deemed essential to competent professional practice. Other dispositions may be important and may guide professional practice but have not been recognized as essential to professional practice. Most important, when training evaluators, we must remember that we are not teaching students what to think. We are not imposing our values and beliefs on others. Following culturally competent best practices, we value differences of opinions; we attempt to fully understand and accurately and respectfully portray the diverse perspectives of others; and although we will do so imperfectly, we recognize that the importance of the endeavour is worth the effort.

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Strategies for Mentoring and Advising Evaluation Graduate Students of Colour

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Abstract: While evaluators have many intersecting identities, ethnicity remains the most salient identity for evaluators of colour. As formal graduate training in evaluation continues to expand, so too does the number of students from ethnic minoritized populations, who are in need of specialized mentoring and advising. Drawing from previous research on evaluation, higher education literature, and personal reflections from the author, an Afro-Latina faculty member, this practice note outlines five strategies for mentoring and advising evaluation graduate students of colour. These include considering the impact of vicarious trauma; assisting with the facilitation of peer and mentor “squads”; respecting, honouring, and celebrating students’ culture, religion, and families; being vigilant of microaggressions and practicing microvalidations; and developing mentoring competence. Each strategy is presented along with reflections and practical examples for implementation.

Keywords: advising, culture, students of colour, teaching evaluation

Résumé : Les évaluateurs et les évaluatrices peuvent avoir de nombreuses identités qui s’entrecoupent, mais l’ethnicité reste l’identité la plus importante pour les personnes qui font partie des groupes minoritaires visibles. À mesure que les études supérieures en évaluation continuent à se développer, les personnes issues de groupes ethniques minoritaires sont de plus en plus nombreuses à s’y inscrire. Ces individus ont besoin de mentorat et de conseils spécialisés. En se fondant sur des recherches précédentes sur l’évaluation, sur la littérature portant sur les études supérieures et sur les réflexions personnelles de l’autrice, une membre du corps professoral d’origine afro-latine, la présente note sur la pratique décrit cinq stratégies pour le mentorat et l’orientation des étudiants et étudiantes issus de groupes minoritaires aux cycles supérieurs en évaluation. Il s’agit notamment de tenir compte de l’impact de traumatisms indirects ; de contribuer à l’animation d’« équipes » de pairs et de mentors ; de respecter, d’honorer et de célébrer les familles, la religion et la culture des étudiantes et étudiants ; de faire preuve de vigilance en ce qui concerne les micro-agressions et d’effectuer des microvalidations ; et d’améliorer les compétences en mentorat. Chaque stratégie est présentée avec des réflexions et des exemples pratiques pour la mise en œuvre.

Mots clés : conseiller, culture, minorités visibles, étudiants et étudiantes, enseignement de l’évaluation

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On September 20, 2016, Kevin Lamont Scott was fatally shot by police in Charlotte, North Carolina—one of 266 African Americans killed by US police in 2016 (The Guardian News, 2019). The next day, I met with two graduate students who identified as Black. News of the shooting was everywhere, and protests had erupted throughout our home state of North Carolina. When they walked into my office, it was evident that both students were upset. I calmly asked how they were doing. After a brief, uncomfortable pause, all three of us broke down in tears. Instead of spending an hour discussing evaluation project updates, we shared anger, fear, and frustration at the state of our nation. Then, after moments of reflective silence, we wiped our tears and resumed our professional faces. The continued killing of unarmed persons of African descent, along with mass shootings, white supremacy, and the current global political climate, can lead to long-term adverse mental health effects for persons of colour (M. T. Williams, 2015). From the moment I was hired at my current institution, I have been sought out by students of colour both within my department and across the university to talk, debrief, and recharge. The need for mentors who can create safe spaces and can nurture, support, and advise minoritized students is clear.

All graduate students experience heightened stress and increased demands, putting them at increased risk of developing psychological and physical health problems (Mallinckrodt & Leong, 1992; Toews et al., 1993). Graduate students from historically minoritized ethnic groups, however, also encounter isolation, microaggressions, fear, distrust, and betrayal (Auguste et al., 2018; McCabe, 2009; M. S. Williams et al., 2016). In addition, they experience education violence—the structural, cultural, and direct systems of schooling that account for how higher education has been an engine of racial hierarchy and white supremacy, ultimately limiting and taking Black and other marginalized lives (Mustaffa, 2017). High-quality mentoring can neutralize these experiences and increased psychological risks while supporting student enrollment, retention, graduation, and job attainment (Zachary, 2000). Graduate students of colour are in need of specialized mentoring and advising (Blake-Beard, 2001a; K. M. Thomas et al., 2007; M. S. Williams et al., 2016) and often have less access to mentors and role-models than their non-minority peers (Girves et al., 2005). Further, previous studies have indicated that students of color have not always received the same quality of mentoring as their peers (Blake-Beard, 2001b; Ellis, 2000).

Overall, there is little research on mentoring graduate students in applied social science inquiry fields. As formal graduate training in evaluation continues to expand (LaVelle, 2018; LaVelle & Donaldson, 2010), so too do the number of students from ethnic minoritized populations (NCES, 2010). While evaluators have many intersecting identities, ethnicity remains the most salient identity for many evaluators of colour (Boyce et al., 2017). Current mentoring efforts by Voluntary Organizations for Professional Evaluation (VOPEs), such as the American Evaluation Association (AEA) Graduate Education Diversity Initiative (GEDI)
program, are for “students who are not already enrolled in an evaluation program / specialization or pursuing an evaluation degree” (AEA, 2019, para. 7). Additional insights are therefore needed for marginalized students seeking evaluation-specific graduate degrees. This practice note outlines five strategies for mentoring and advising evaluation graduate students of colour.

DIMENSIONS OF PRACTICE

Understanding the tenets of culturally relevant pedagogy (Ladson-Billings, 1995) is essential when discussing how to mentor students of colour. The goals of this approach are to situate teaching within students’ home and community cultures—not often found in schools (Erickson & Mohatt, 1982)—allowing students to succeed academically while maintaining their cultural integrity (Rockquemore & Laszloffy, 2008). Ladson-Billings (1995) outlines three propositions for culturally relevant pedagogy:

Conceptions of self and others

Culturally relevant teachers

- believe that all students are capable of academic success,
- see their pedagogy as art—unpredictable, always in the process of becoming,
- see themselves as members of the community, and
- see teaching as a way to give back to the community. (p. 478)

Social Relations

Culturally relevant teachers

- maintain fluid student-teacher relationships,
- demonstrate a connectedness with all students,
- develop a community of learners, and
- encourage students to learn collaboratively and be responsible for another. (p. 480)

Conceptions of knowledge

Culturally relevant teachers believe

- knowledge is not static, but is shared, recycled, and constructed,
- teachers must be passionate about knowledge and learning,
- teachers must scaffold, or build bridges, to facilitate learning, and
- assessment must be multifaceted, incorporating multiple forms of excellence. (p. 481)

One predictor of a successful mentor relationship is the mentor’s ability to balance advocacy and personal support with the duty to produce a competent professional
As such, a key barrier to any mentoring relationship is the mentor’s lack of skills, competencies, and interest. While mentors are more likely to be motivated to mentor students who present as similar to themselves (Lankau et al., 2005), ethnically marginalized students can be effectively mentored by white faculty (K. M. Thomas et al., 2007).

Despite shared culture and lived experiences, mentoring relationships between faculty members of colour and students of colour are not automatically effective. Other identities (e.g., gender, the nation of origin, age, and sexuality) can impede initial mentor-mentee connections. And in addition to balancing teaching, research, and service responsibilities, faculty of colour are often already overburdened by navigating their own experiences with isolation in the workplace. Invisible service, in this case with the additional time needed to adequately mentor students, is not rewarded in the promotion and tenure process (Matthew, 2016).

Beyond their participation in VOPE-sponsored training programs, there is as yet no research or theoretical musing about the experiences of evaluation graduate students of colour. In a promising development, foundations such as W. K. Kellogg, Robert Wood Johnson, and Annie E. Casey have begun to support the goal of diversifying our field (Dean-Coffey, 2018). Christie and Vo (2011) have outlined the strengths and sustainability challenges associated with the Robert Wood Johnson Foundation Evaluation Fellowship program for those underrepresented in program evaluation. In addition, new scholarship is emerging that urges evaluators to consider culture, equity, race, and class in the teaching of evaluation (Boyce & Chouinard, 2017; V. G. Thomas & Madison, 2010).

TEACHING CONTEXT

I am an Afro-Latina tenure-track assistant professor in an educational research methodology department. With critical (Everitt, 1996; Fay, 1987) and culturally relevant pedagogy (Ladson-Billings, 1995) as a guide, I have taught the following courses: Advanced Evaluation Theory, Advanced Research Methods for Dissertating, Culturally Responsive Approaches to Research and Evaluation, Educational Measurement and Evaluation, Educational Research Methods, and Evaluation of Educational Programs. I currently advise 13 Master of Science and Doctor of Philosophy students, nine of whom identify as persons of colour. Each has additional intersecting identities of privilege and oppression (Crenshaw, 1989), some of the most salient being religious preference, nation of origin, sexuality, and ability status. I hope these students will have a strong methodological foundation, conduct studies based on democratic principles, and promote equity, fairness, inclusivity, and diversity. I encourage them to utilize cultural responsiveness, sensitivity, and competence to dismantle archaic discourses of power and inequity within social science inquiry (Symonette, 2004; V. G. Thomas & Madison, 2010).

The theoretical foundations of this article rest on the literature of critical race theory (CRT) (Bell, 1999; Crenshaw et al., 1995; Ladson-Billings & Tate, 1995) and
culturally relevant pedagogy (Ladson-Billings, 1995), and are based on evaluation research, higher education literature, and personal reflections. I have spent a great deal of time reflecting on my experience as a Black graduate student. And since the beginning of my second semester as a tenure-track professor, I have kept a journal about my experiences and have noted the needs of my students, especially those from minoritized populations. As I examined my experiences and reviewed the literature, I positioned all of my interpretations using the key tenets of CRT (Delgado & Stefancic, 2001, as cited by Ladson-Billings, 2013):

- belief that racism is normal or ordinary, not aberrant, in US society,
- interest convergence or material determinism,
- race as a social construction,
- intersectionality and anti-essentialism, and
- voice or counter-narrative.

I have also drawn lessons from previous research by evaluators of color who examine how and in what ways the intersections of ethnicity and race, socio-economic status, gender, sector of employment, education, years of experience, and US political climate affect the identity, role, and practice of evaluators of color (Reid et al., 2020).

LESSONS LEARNED AND IMPLICATIONS FOR PRACTICE

K. M. Thomas et al. (2007) outlined strategies that they believe to be essential and necessary for increasing access to, and the quality of, mentoring for students of color. These strategies are grouped by the entity responsible, including organization, faculty, and minority graduate student. My reflections, research, and review of literature have led me to five strategies for mentoring and advising evaluation graduate students of color. They expand existing higher education literature and are the first of their kind within the field of program evaluation.

I offer three caveats. First, much of what I present may not be relevant only for mentoring students of color. While white graduate students and their minoritized peers are similar in terms of their capacity and capability, their journeys are unique due to the “intervening effects of racism” (Rockquemore & Laszloffy, 2008, p. 5). As such, I have attempted to offer contextualized examples that may seem generic. Second, I recognize that neither persons of color nor their experiences are homogeneous (Ladson-Billings, 2013). There are subjective and objective differences between groups, including group-specific assumptions and biases. Third, as Crenshaw’s (1989) foundational work has pointed out, there are many intersecting identities of oppression and privilege. I have purposely chosen the narrow focus of racism, as previous research has highlighted its salience for evaluators of color (Boyce et al., 2017). It is my hope, however, that others will take up the important task of research and theoretical musings on recommendations for mentoring students with other identities.
What follows is a brief discussion of each strategy, along with reflections and practical examples for implementation.

**Consider the impact of vicarious trauma**

On May 25, 2020, George Floyd was murdered by police in Minneapolis, Minnesota. For nearly nine minutes, a white police officer knelt on his neck while he was handcuffed face down on the street. Onlookers and other police officers watched as he pleaded for his life. After a video of his death was shared on social media, uprisings worldwide decried human rights abuses in the United States, focusing on police brutality and violence against Black people.

In the age of Facebook, Snapchat, and Twitter, news and current event updates are ubiquitous. In late June 2019, pictures of the drowned bodies of Salvadoran immigrant Oscar Alberto Martínez Ramírez and his toddler, Valeria, circulated broadly on television and social media accounts. Videos of the moments before the deaths of Eric Garner, Philando Castile, Ahmad Aubrey, Sandra Bland, and many others have been similarly shared. While knowledge and acknowledgement of these events are necessary for fighting inequity and injustice, repeated exposure to racial violence can trigger the same symptoms as post-traumatic stress disorder (PTSD) (M. Williams & DeLapp, 2016). Research on professionals who work in high-stress and trauma-exposed fields has deepened our understanding of the impact of vicarious traumatization (Pearlman & Maclan, 1995) and secondary traumatic stress (Figley, 1995; Stamm, 1995), and recent literature has suggested that people of colour are especially susceptible to experiencing vicarious trauma (M. T. Williams, 2016).

Advisors of evaluation graduate students of colour should create spaces for students to express their feelings and, if they choose, be vulnerable and open about the stressors of simply being a person of colour in a world with white supremacy woven into its very fabric. While these opportunities do not need to happen solely during closed-door conversations, the use of townhall and open forums requires agreement about norms and the consequences for breaking them. In addition, for example, to discussing Scott's murder with students in my office, I also moderated critical discussions during class that semester. Even when the content scheduled for class doesn't lend itself to conversations about current events or social justice, I often give students a chance to have formal check-ins.

**Assist with the facilitation of peer and mentor “squads”**

US congresswomen Rashida Tlaib, Ilhan Omar, Alexandria Ocasio-Cortez, and Ayanna Pressley refer to the community they've built upon their professional friendships as a “squad” (Sullivan, 2019). A squad is a group of people who have your back, who have your best interests at heart, and who are in solidarity. Research with African-American doctoral students has suggested that mutual peer support from those with similar backgrounds can increase feelings of self-reliance (Lewis et al., 2004). Similar findings have been self-reported by faculty of color (McGowan et al., 2019) and advocated for by Ladson-Billings (1995). While peer-support
systems are critical, evaluation graduate students of colour should also have access to multiple mentors. These students need a “squad” of mentors, including peers, family, and faculty (Kram, 1985).

Whenever a prospective student emails me, I put them in touch with current students in my department. I find this is especially important for international students; I am unable to speak to how the culture in North Carolina and in our department differs from their home culture. I also aim to introduce students to faculty across campus who have similar cultures and backgrounds, something done for me when I was a graduate student. On the day I interviewed, the first thing my future advisor Dr. Jennifer Greene said to me was, “You would probably like to chat with an African-American faculty member?” I agreed, and she walked me upstairs to meet with Dr. Jim Anderson (a renowned Black historian of education). She gave up time with me so that I might spend time questioning him and learning about his experience. It truly takes a village, and one faculty member cannot be everything a student of colour will need in a mentor.

Respect, honour, and celebrate students’ culture, religion, and families

Studies of students from Latinx, Asian, Indigenous, and Black ethnicities have highlighted the vital roles that spirituality and family play in their lives. A study of Chicana doctoral recipients, for example, found that active family socialization assisted them when they encountered messages of unworthiness (Morales, 1988). Native American graduate students have described the meaningful role that spirituality plays in their resilience and internal development (Hampton, 1995). And Christianity and the family unit have prominent places in Latinx and Black cultures. It is critical that advisors and mentors honour, support, and respect these and other cultural tenets. Shahjahan and Barker (2009) argue for the legitimization of spiritual epistemological perspectives of ethnically minoritized graduate students as a way to enhance equity in higher education culture.

Advisors of evaluation graduate students of colour can research or have conversations about the norms and dates associated with the holidays and events that their students observe. When it comes to Christmas, Easter, Ramadan, Eid al-Fitr, Kwanzaa, Rosh Hashanah, and Yom Kippur, I try to avoid scheduling important deadlines. While I can’t know all the traditions observed by my students, I encourage them to inform me about their cultural and religious traditions as appropriate. One evening a few years ago, one of my students was hit by a stray bullet that came through her apartment wall. I knew this student was a practicing Christian. When I got to the emergency room, the first thing I said was “I have already prayed for you, and I believe everything is going to be ok.” I saw some relief and comfort cross her face. It is necessary for me to connect with my students on a spiritual level. Finally, when we have class presentations, I encourage students to bring a dish to share. This often becomes a celebration of cuisines from around the world, with students sharing recipes and related stories during the class break.
Be vigilant of microaggressions and practice microvalidations

Students of color experience subtle forms of racism, known as microaggressions, that are often directed towards them by peers and faculty (Kohli & Solórzano, 2012; McCabe, 2009). As a result, they experience discomfort, self-doubt, exhaustion, isolation (Gildersleeve et al., 2011; McCabe, 2009), and a lowered sense of belonging and academic connectedness (Suárez-Orozco et al., 2015). Microaggressions, a term first coined by Chester Pierce and colleagues (1978), are racially insensitive comments, acts, or “put-downs” toward members of a minoritized group, which can include having their name mocked or mispronounced, being asked where they are really from, or inappropriate comments about hair or dress.

It is not enough for advisors and mentors to not be racist; they must be anti-racist (Kendi, 2019). Kendi (2019) suggests the following tips: acknowledge your own racism (denial is the heartbeat of racism); confess your racist ideas; define racism and antiracism; identify racist systems; and work to change racist systems. In addition, a key tenet of culturally responsive pedagogy is to believe that all students are capable of academic success (Ladson-Billings, 1995). Therefore, advisors and mentors should also practice giving microvalidations (Packard et al., 2011), small acts and words that validate who graduate students believe they can be. My post-doctoral advisor always praised me in public and raised concerns in private. I regularly let my advisees know that I am proud of them, see their potential, and believe in them. I learn every student’s name and work to pronounce their names correctly. And I make a concerted effort to refer to my advisees as my colleagues.

Develop mentoring competence

Graduate students are not the only community in need of mentoring and development. Faculty should also seek professional development, especially related to mentoring and diversity (K. M. Thomas et al., 2007). Faculty are not usually trained to be advisors, nor are they evaluated on the quality of mentoring they provide (Johnson & Huwe, 2002); evaluations are usually related to scholarly productivity, including publications, presentation, and grants (Girves et al., 2005), which do not necessarily indicate appropriate mentoring.

Each of these strategies is important. I have committed to professional development in the areas of classroom and laboratory management, providing feedback, and improved interpersonal skills as they relate to mentoring relationships. Further, I have spoken to my department chair and others to facilitate peer relationships and workshops for those interested in developing skills related to mentoring, supervising, and advising graduate students. Thus far, I have attended workshops related to understanding various People Styles (Bolton & Bolton, 2009), providing graduate students with feedback, and the importance of reflection.

CONCLUSION

As this issue highlights, the teaching of evaluation literature continues to be essential as our field expands and professionalizes. Literature from other fields
suggests that good mentoring can have positive impacts, both personally and professionally (Zachary, 2000). It is my desire that all evaluation graduate students receive high-quality advising and develop meaningful relationships with mentors. I have outlined five strategies for mentoring and advising evaluation graduate students of colour, some of which may be useful for all students. Mentoring takes time and commitment from both advisor and student, and it is a responsibility and privilege for all evaluation teachers. Consequently, there should be a culture of support to help all faculty effectively mentor students of colour. Empirical research and additional insights about effective best practices are clearly needed, both for graduate students of colour and for students of various identities.

While I have focused on interactions with students of colour as an important factor for high-quality mentoring, our conversations and actions while students of colour are not in the room are just as important. Therefore, I conclude with a few questions for reflection. Do you advocate for students of colour and their best interests during department meetings? Are you on the lookout for, and committed to, dismantling systematic racist ideas, procedures, and policies within your institution? Have you publicly spoken out against racism? Have you held others—especially those in power—accountable when you have witnessed sexist, racist, or oppressive language, ideas, or actions from your colleagues? What are you doing to create a safe and inclusive environment for students of all ethnicities, racial backgrounds, religions, ability status, socioeconomic backgrounds, first-generation status, nation of origin, sexualities, and gender identities? In the words of Desmond Tutu, “If you are neutral in situations of injustice, you have chosen the side of the oppressor” (as quoted by Brown, 1984, p. 19).

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Offering Graduate Evaluation Degrees Online: Comparing Student Engagement in Two Canadian Programs

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Abstract: This practice note describes and explores the experiences and lessons learned as we engaged learners in two online graduate evaluation programs: the University of Victoria’s Graduate Certificate and Diploma in Evaluation Program, offered since fall 2011, and Carleton University’s Graduate Diploma in Public Policy and Program Evaluation (DPPPE), offered online since fall 2016. Both programs are delivered to maximize the geographic accessibility of graduate evaluation education within and outside of Canada. While each program uses different teaching and learning strategies, four lessons are common to the two programs: set and meet (or exceed) clearly stated student expectations, set and then model a respectful and inclusive tone in online discussions, stretch online discussions by taking advantage of student expertise and experience, and use adult-oriented and rigorous teaching and learning methods that engage mature and mid-career learners.

Keywords: evaluation, graduate programs, online, teaching

Résumé: Cette note sur la pratique décrit et explore les expériences et les leçons tirées de la prestation de deux programmes d'études supérieures en ligne en évaluation : le programme de certificat et de diplôme de cycle supérieur en évaluation de l'Université de Victoria, offert depuis l'automne 2011, et le programme de diplôme de cycle supérieur en politique publique et en évaluation de programme de l’Université Carleton, offert en ligne depuis l'automne 2016. Les deux programmes sont offerts de manière à maximiser l'accessibilité géographique de la formation aux cycles supérieurs en évaluation au Canada et ailleurs dans le monde. Chaque programme utilise des stratégies d'enseignement et d'apprentissage différentes, mais quatre leçons sont communes aux deux programmes, soit : établir des attentes explicites de la part des étudiantes et étudiants et y répondre (ou les dépasser) ; établir la nécessité d'adopter un ton respectueux et inclusif dans les discussions et donner l'exemple ; approfondir les discussions en profitant de l'expertise et de l'expérience des étudiantes et des étudiants ; et utiliser des méthodes d'enseignement et d'apprentissage rigoureuses

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et conçues pour des adultes, pour susciter l’intérêt d’apprenantes et d’apprenants d’âge mûr et à la mi-carrière.

Mots clés : évaluation, programme d’études supérieures, en ligne, enseignement

McPherson and Bacow (2015) suggest that by 2012, one-third of US college learners had taken at least one online course, compared to 10% in 2002 (p. 140). High-profile MOOCs (Massively Open Online Courses) are just the latest indication of the growth of online education (McPherson & Bacow, 2015). With many post-secondary institutions moving away from face-to-face classes in response to the COVID-19 pandemic, the use of online teaching and learning strategies has accelerated. Increasingly, the challenge is to engage adult learners in “deep” learning using multiple learning techniques and according to andragogical principles (Barab et al., 2001; Knowles, 1984). Andragogy is premised on the idea that education geared to adult learning is more self-directed and that learners take responsibility for their learning. Each program assumes that learners will engage the materials experientially using problem-solving approaches, hence the need for practice-oriented assessments.

This practice note explores experiences and lessons learned as we engaged learners online in two graduate programs in evaluation: the University of Victoria’s Graduate Certificate and Diploma in Evaluation Program, offered since 2011, and Carleton University’s Graduate Diploma in Public Policy and Program Evaluation (DPPPE), offered online since 2016. We begin by describing our programs and then compare our experiences engaging learners and delivering these programs.

SETTING THE STAGE

Origins of our two programs

Both the University of Victoria (UVic) and Carleton University are members of the Consortium of Universities for Evaluation Education (CUEE), an informal collaboration founded in 2008 to foster opportunities for graduate evaluation education in Canadian universities (McDavid et al., 2020). The UVic program was created in response to the Canadian Evaluation Society (CES) Credentialed Evaluator (CE) Program, which began in 2010. The UVic School of Public Administration (SPA) obtained approval to offer a four-course Graduate Certificate with the option for learners to earn a Diploma (the equivalent of an additional three courses) upon completing a solo evaluation project.

The Carleton diploma was created in 2006 in response to growing demands from the federal Treasury Board Secretariat (TBS) for more highly trained evaluators to staff evaluation units. At that time, six stand-alone, in-class courses were developed from existing resources. In response to diminishing resources for federal evaluation training between 2006 and 2015 (TBS, 2015), it was decided to transition the program online in 2016 to take advantage of a larger market.
Why online?

In 2003, UVic’s SPA started offering its flagship Master of Public Administration Program (MPA) in an online format. Experience with the MPA indicated that learners valued the flexibility of online courses and often combined their graduate education with existing career and family commitments. The Graduate Certificate takes advantage of existing infrastructure and experience to offer a program that fits the School’s online profile.

At Carleton, several timing considerations led to the decision to transition the diploma online. The province and university were investing in online education programs, and provincial eCampus funding was available. Consultations with the larger CES community indicated that the demand for online opportunities was increasing, and few Canadian universities were offering online graduate policy education programs. Investment in federal evaluation was diminishing, which made local in-class delivery untenable, and the School of Public Policy & Administration (SPPA) was investing in other online programs.

Designing the programs

By 2011, most graduate-level elective SPA courses were offered online. Several new graduate certificate courses were developed in methods and performance management. The program currently comprises two required courses and two electives, and new students are expected to meet a prerequisite in research methods. Nearly all applicants have previously earned graduate degrees.

By 2015, the DPPPE had been reformed from its original conception as stand-alone courses in methods and theory. A new adult-learning, cohort-based design (Knowles, 1984; Saltiel et al., 2002) was instituted in 2010, placing a major practicum project at its centre. The six courses were harmonized to mirror the phases in a typical real-world evaluation project: scoping, design, planning, data gathering, analysis, and reporting. With this design, transitioning the program online was simplified. Nearly all applicants hold graduate degree credentials, and all applicants must meet prerequisites in microeconomics and research methods.

Delivering the programs

Both programs are offered part-time over 16 months. The UVic program permits learners from its Master’s and doctoral programs to enroll in any of the courses; Carleton’s is a stand-alone program that permits limited enrolment in the preparatory courses by MPPA and PhD learners.

Both programs deliver foundational courses in the first two terms: survey of the field, theories of evaluation, performance management, and methods. The Carleton program designates two of six courses as an evaluation practicum: one aims at planning, and the second at data analysis, report writing, and presentation. The UVic diploma provides an optional add-on practicum for learners who want to conduct a full evaluation project.

For the learning platform, both programs employ Brightspace, a learning platform that provides flexibility to deliver content synchronously and/or
asynchronously using recorded lectures and built-in video classrooms (D2L, 2020). They follow roughly the same activities: introduction to the weekly module, readings from texts and articles, narrated lectures, online learning objects (e.g., TED talks, recorded interviews), discussion forums, and written assignments and exercises.

Several principles underlie the program designs. All courses are designed in advance; required course elements include detailed instructions for assignments and discussions, and evaluation rubrics ensure that assignment instructions correspond with grading expectations. Course syllabi, available in advance, function as contracts between instructors and learners (Barab et al., 2001). Instructor and learner expectations for participation are made explicit (Barab et al., 2001), and online codes of conduct are instituted and enforced to ensure that learners respect rules related to honesty, respect, accountability, and program integrity (Coleman, 2012). And learners in each program are introduced to their university’s ethics frameworks for conducting fieldwork. Ethics approval is mandatory for UVic students conducting diploma-related evaluation projects, and Carleton learners must secure ethics approval for practicum projects, especially those involving vulnerable populations. Learners are expected to check in with instructors on the project’s progress, and to raise hurdles experienced in their courses. These are used as key learning points.

**ENGAGING THE LEARNERS: TWO PROGRAMS—TWO EXAMPLES**

The UVic and Carleton programs employ similar strategies to engage in “deep” learning (Barab et al., 2001; Knowles, 1984); with learners studying from a distance, the necessity for creative ways to garner participation increases relative to classroom teaching. We describe two strategies to engage learners: online discussions and online practicums.

*The UVic introductory course in the graduate certificate: Engaging the content*

UVic graduate certificate learners enrol from across Canada and beyond, making synchronous meetings difficult. Existing graduate SPA electives have been asynchronous, so learner-to-learner and learner-to-instructor interactions are one-on-one or through posts to weekly discussion forums. This approach builds an inclusive and effective learning environment, encouraging follow-up discussions between learners and instructor as well as among class members.

The introductory course examines program evaluation and performance measurement in public and non-profit organizations and focuses on skills development to model programs, measure key constructs, select appropriate research designs, conduct both quantitative and qualitative program evaluations, and develop performance measurement systems (University of Victoria, 2019). Learners are notified pre-delivery that over the semester they must each work on a design for an actual evaluation. Certificate and graduate learners rely on their workplace or a current or previous co-op employer to identify projects.
Three design strategies underlie how learners are engaged. First, the beginning session features an ice-breaker discussion, such as whether it is possible to be objective, both personally and in terms of one’s own research and evaluation work. This three-day discussion begins with all class members posting their 100-word personal views. Through iterative discussions including the instructor and other class members, it is typical for students to post between 5 and 10 times per week. Each week, the instructor posts a wrap-up summarizing the discussion and offers general comments that preview key themes for the next week.

Second, weekly discussions in the first half of the course are tied to the final assignment. Learners post a first draft of specified segments of their emerging evaluation designs for formative feedback from instructor and peers. In successive weeks, additional elements of their designs are posted and commented on, ensuring that by Week 7 of 12, each student has had and contributed feedback/learning to improve the quality of their final designs.

Third, informal peer leaders are used to advance class learning. These leaders are students who stand out by engaging fellow learners and the instructor from the first class, and are identified simply by tracking the number and quality of postings. Often three or four leaders are called upon to elicit deeper explorations of topics and invite participation, or are asked to post first on designated threads. As an example, in one offering of the course, an Indigenous student with experience as a leadership trainer volunteered his perspectives on the weekly discussion topics and encouraged the class to engage with him, which led to in-depth discussions of evaluation issues from an Indigenous perspective that went beyond the assigned course resources.

The Carleton experience with the practicum project: Engaging content and clients

Teams of Carleton diploma learners work synchronously through video and forum discussions on their practicum assignments. All learners are required to identify a project midway in the first term, either assigned or solicited on their own, and to work on these in groups of two to four. Clients are invited by the program supervisor to participate, and each relationship is formalized in an MOU that lays out the expectations of each party over the duration of the program.

The program design is such that four preparatory courses are delivered over the first fall and winter terms, and two dedicated practicum courses assist learners in working through their practicum design and delivery. The first term prepares learners in theory and quantitative methods, while the second concentrates on qualitative methods and introduces the first practicum course to build a working evaluation design. Data gathering occurs over the spring and summer while students take another methods course, and the final term focuses on data analysis and reporting through the second practicum course. Learners check in with clients and instructors at critical points, and the program culminates in a final presentation to clients in December of the following year. Clients are asked to
commit approximately five hours monthly, and they remain involved through a
dedicated team captain and assigned instructor.

Engagement of deep learning and participation is supported using the fol-
lowing strategies:

- course sequencing and content support active learning by ensuring that
  projects are scoped discretely with active participation of clients;
- ethical considerations appropriate for that stage are introduced in each
course;
- the Brightspace platform enables synchronous visual group meeting
  rooms, data storage, and discussion forums;
- program instructors meet at predetermined times in the year to ensure
  optimal coordination and hand-off of project responsibilities;
- grading for each course is led by the assigned course instructor, but
  coordination among instructors is encouraged to ensure consistency of
  feedback;
- each project group is assigned an instructor to act as mentor, and exter-
  nal resources are invited where needed to enrich content; the program
  supervisor acts as the ultimate facilitator of the projects, reducing the
  stress felt by learners in practicum assignments (Maidment, 2006);
- a learner champion is resident in or familiar with the program; this is
  critical to success, encouraging inclusive collaborative learning; it also
  ensures that learners are committed to high-quality outputs (Seagrave &
  Holt, 2003);
- the practicum courses are designed flexibly, with instructors engaging
  the practicum groups rather than the entire cohort; learners benefit from
  a combination of class delivery strategies and small group discussions
  (Saltiel et al., 2002).

CHALLENGES ENGAGING LEARNERS ONLINE

Ongoing time commitment and written feedback

Instructors must be available for several hours each week, depending on cohort
numbers and activities (Mandernach et al., 2013). Each program commits learn-
ers to engage in discussion forums between Wednesdays and Fridays; with 20–25
learners, instructors can post up to 40 times per week. However, in weeks in
which learners are posting evaluation design elements for formative feedback,
instructor postings can be as high as 70–80 postings, offering ways of facilitating
general learning as well as specific feedback. It is possible to reduce this time and
hold online discussions with individuals (UVic) and groups (Carleton), but time
requirements remain significant. At Carleton, a teaching assistant provides sup-
port, but the instructor must remain present for challenging problems, and the
time commitments extend far beyond those of in-class equivalents. While studies
suggest no difference between online and in-class learning outcomes (Cummings et al., 2015), the energy required for online learning is much greater, especially when working with mid-career and mature learners. Learners often welcome feedback from their peers, especially as most are already accomplished in their fields. In essence, learners can be informed instructors using practical knowledge to support their feedback.

For learners, online courses typically take eight to ten hours a week of preparation and participation. Assignments require additional time, although in both programs the assignments reflect the course content in ways that overlap with online discussions. In the UVic program, for example, the first assignment is a critical assessment of an actual evaluation report. Two weeks before the due date, an online discussion focuses on an evaluation report included in the course materials. In the Carleton program, the first assignment is to practice with theories of change, with online exercises emphasizing logic, objectivity, and results pathways.

**Programmatic support is critical to success**

A critical issue for any online program is whether resources (time, money, expertise) are sufficient to develop and continuously renew courses. Each program is familiar with online learning and has access to expertise that many university programs do not enjoy. That said, university commitment to course and program development is fundamental. Whereas the UVic program had access to limited start-up funds for initial course development, the Carleton program competed for provincial funding and was able to pay for university expertise. Universities continue to exhibit mixed commitment to online support, although this is changing given the COVID-19 pandemic.

One notable difference between the two programs is the level of ongoing administrative support for each learning cohort. The Carleton diploma operates as a stand-alone program with a dedicated program supervisor who coordinates course delivery and the practicum projects. Group practicum projects are built into program expectations. The UVic certificate courses double as electives in other programs; if learners choose to conduct an evaluation project, they work with a faculty supervisor and a client. The UVic diploma is built on top of the requirements for the certificate program.

**Engaging and coordinating non-faculty instructors**

Both programs rely heavily on non-faculty instructors (five of six courses in Carleton’s case). Coordination costs can therefore be high for dedicated faculty (Cummings et al., 2015). This often means that the program supervisor is responsible for maintaining coherence over the program’s duration and that creativity is needed to maintain instructor/learner engagement. Communication and transparency are critical. That said, the value placed on such “administrative” effort can be low or not well understood by university or even unit management. Ongoing communication is critical to ensuring that supervisor workloads are reasonable, and keeping good instructors over time can be difficult, because responsibilities
are seen as related to courses rather than to the program as a whole (Mandernach et al., 2013).

**LESSONS LEARNED ENGAGING LEARNERS ONLINE**

**Setting and then meeting expectations**

As important as the instructor’s presence and expertise, are the setting and meeting of expectations. At the outset of each course, it is essential to indicate when the instructor will be available, how long they will take to respond to questions, and the time expectations for returning assignments. The instructor must consistently meet or exceed those expectations, or there is high risk that the course will lose momentum. The introductory courses for both programs, led by full-time faculty, set the tone for learners and indicate the level of commitment expected.

**Setting a respectful and inclusive tone**

How the instructor interacts with learners online is important for setting the tone for the discussions. Including language around respectful interactions in the syllabus is essential. The UVic program relies on instructors to model appropriate online behaviours, whereas the Carleton program requires learners to develop codes of conduct for group interactions in addition to MOUs with clients that reflect both project products and the research and ethical aspects of the process.

**Stretching the discussion**

Online discussions based on the readings and on a given week’s topic often evolve and provide opportunities to explore additional topics. What starts as a discussion of the validity of research designs might evolve into one on the credibility of drug trials, given the importance of drug-company funding. Both learners and instructor can easily find online resources that enable discussions of the challenges of designing and implementing “gold standard” research designs. Even though some conversations range across topics that appear (again) later in the courses, taking advantage of the moment is an important way to enrich the course and engage class members. As ethical discussions can be unfamiliar, learners must be encouraged to engage material with openness.

**Online learners are different**

Evaluation learners at Carleton and UVic tend to be older, more established, and more experienced than their full-time Master’s equivalents. These diplomas and certificates attract mid-career professionals looking to upgrade their credentials and, as a result, student expectations for learning tend to be much higher. Learning techniques must be adult-oriented and usually much more rigorous. This a lesson learned over time, and it points to an opportunity to network these learners with regular Master’s learners. The potential for engaging in interesting projects or learning events is significant, and a gift for each program.
**It is important to engage with adult learners with passion and energy**

Providing instruction in an online environment is different from in-class delivery. Although instructors in both programs are well established in in-class settings, the nature of engagement to ensure momentum in both synchronous and asynchronous online learning requires a much different approach, one centered on being present with passion and emotion (Giossos et al., 2008). In-class engagements rely on spontaneous learning approaches, whereas online engagements require a steady and deep-learning approach with significant emotional investment from both instructor and learner, because adult learners **want** to engage with the materials, each other, and the instructor(s) with deep-seated commitment. Both programs rely on instructors with passion for the field and a commitment to student learning that draws on significant experience (Pavlakis & Kaiteldou, 2012). Expectations by learners for course and program engagement are much higher than those of in-class deliveries for new learners (Rovai, 2002).

**CONCLUDING THOUGHTS**

While graduate evaluation education is still in its infancy, it is developing in ways that offer opportunities to reach mid-career and mature learners who otherwise would not be able to access programs. Two recent inventories of programs in the United States (LaVelle, 2019) and Canada (Hunter & McDavid, 2019) found that few existing programs were offered online (three in the United States and three in Canada). Given the general growth in online post-secondary education, we predict that more online programs will emerge, particularly for those wanting professional credentials.

The programs illustrated, with their different histories and institutional environments, reflect the diversity of educational options in our field. The Carleton program, which responded to changes in the federal evaluation environment to broaden its reach, will need to consider how strongly to reach across international boundaries for learners; this will present both opportunities and challenges. The UVic School is in the midst of a faculty renewal process, with several new members who have evaluation-related expertise. Such expertise and interests will be reflected increasingly in the certificate and diploma program.

Both programs have enjoyed considerable success since their inceptions. For Carleton, moving the program online has resulted in more applications and more diverse and practitioner-focused cohorts of learners. At UVic, the program has consistently attracted high-quality applicants who contribute a unique, practitioner-based perspective to the online courses they share with other graduate learners. Both programs have been able to graduate most of those accepted into the programs: Carleton, 75%, and UVic, 72%.

Although online delivery is challenging due to its up-front requirements and ongoing demands for faculty and student commitment, it offers a way to reach and train mid-career practitioners that produces outcomes rivaling those...
of on-campus graduate education (Cummings et al., 2015; Chiero & Beare, 2010; McGready & Brookmeyer, 2013).

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Teaching Africa-Rooted Evaluation: Using a “Model Client” Innovation to Help Shift the Locus of Knowledge Production

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Abstract: Evaluators working on the African continent are increasingly tasked with reflecting critically on how they might integrate African methods, culture, and knowledge systems into both evaluation teaching and practice. This practice note reflects on one small but potentially significant step toward this: revisiting how we deliver our Principles of Programme Evaluation module at the University of Cape Town. Our idea, which we call a “model client” approach, was to bring on board the evaluation client as a co-learner in the classroom environment. Through a series of instructor-facilitated client-student engagements, which unfolded within the classroom space, we (the instructors, students, and client) arrived at a co-created understanding of the program logic and co-determined the evaluation questions and evaluation approach. Key challenges in implementing this approach included managing the client’s sense of vulnerability, student inexperience in evaluation theory and practice, and a conspicuous shortage of African-generated evaluation case studies and texts.

Keywords: evaluation teaching, Made in Africa, model client, participatory approaches

Résumé : Les évaluatrices et les évaluateurs qui travaillent sur le continent africain doivent, de plus en plus, faire une réflexion critique sur la façon dont les systèmes de connaissance africains peuvent s’appliquer à la pratique et à l’enseignement de l’évaluation. Cette note sur la pratique traite d’une révision de la façon dont nous offrons le module Principes de l’évaluation de programmes à l’Université de Cape Town. Notre idée, que nous appelons une approche de « client modèle », consiste à inviter le client d’évaluation à se joindre à la classe comme apprenant. Par l’intermédiaire d’une série d’interactions client-étudiantes/étudiants prises en charge par les responsables de la formation, qui ont eu lieu dans la salle de classe, nous (les formatrices, les étudiantes et étudiants et le client) sommes arrivés à une compréhension commune de la logique du programme et avons déterminé ensemble les questions et l’approche d’évaluation. Les principaux obstacles à surmonter pour mettre en œuvre cette approche comprennent : la gestion de la vulnérabilité du client ; le fait

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THE TEACHING CONTEXT

In 2008, the University of Cape Town’s Master of Philosophy (MPhil) specializing in program evaluation was established with a view toward bringing global advances in evaluation theory and practice to one of Africa’s foremost universities. The degree was in its eighth year of implementation when a student protest movement began in South Africa. Originally directed against a statue of Cecil John Rhodes, commemorating the nineteenth-century British imperialist, on the UCT grounds, the protest action (#RhodesMustFall) gained national momentum through 2015 and into 2016 and resulted in the complete suspension of all teaching activities at UCT (and elsewhere) for months at a time. Central to these protests was the call for the “de-commodification” of higher education (i.e., #FeesMustFall) as well as the “decolonization” of the university culture (i.e., #RhodesMustFall) (Malabela, 2017; Ndulu, 2017). Forcefully, often angrily, students were rejecting the notion of the African university as a conduit for Western knowledge transfer and demanding that “instead of Africa and her people being seen only as objects of study, they become key drivers of the decolonial knowledge project, as they reclaim agency as co-creators of global knowledge” (Curriculum Change Working Group, 2018, p. 21). In tandem with this movement, a growing call from African evaluation scholars to “make evaluation our own” was also shifting the status quo toward a specifically African cognitive lens in evaluative thinking (Mbava, 2019). This initial call to action had arisen from the African Evaluation Association (AfrEA) conference held in 2007, and for an AfrEA forum in 2012 the African evaluation thought leader Bagele Chilisa was asked to develop a position paper on the concept of “Made in Africa evaluation” (Chilisa, 2015). The discourse on Africa-centric approaches was thus pressing equally on both academic scholars and applied practitioners of evaluation.

We authors are a group of evaluation teachers and practitioners who consider ourselves African in the typically diverse and culturally eclectic sense that characterizes the continent. We present a mix of races and nationalities: Three of us were born in South Africa, and Adilah Boodhoo is a Mauritian national. Authors Goodman, Chapman, and Boodhoo have been teaching evaluation for 10 years but had never been asked to teach it in this consciously Africa-centric way. Our fourth author, in contrast, is a black South African who in 2019 was deeply immersed in postdoctoral research on Africa-centric evaluation approaches but had limited experience teaching evaluation. Our students are also typically diverse: Approximately half of our class of 12–15 are international students who travel from all parts of Africa to participate in our degree program. The other half are
native South Africans who themselves tend to reflect the cultural and racial diversity that is the South African population. Most but not all of the students have had some work experience, and many complete the program while working at the same time.

This teaching practice note reflects on one small but potentially significant step we made toward redesigning a core introductory module for the Master’s in Program Evaluation: Principles of Program Evaluation. The curriculum change idea was a relatively simple one, but one incubated in the context of the numerous ideological shifts we have described. Our idea was to move the locus of evaluation knowledge creation away from a theoretically grounded introductory course, which drew predominantly on Western texts and theory, toward an approach where both our understanding of the evaluation process and the evaluation capabilities themselves are co-created by our uniquely African clients, students, and instructors. We begin our practice note by describing the approach we implemented in the first academic semester of 2019, and then reflect on how this approach moves toward addressing concerns around decolonized and Africa-centric evaluation practice. We conclude with reflections on what worked and what did not work in our curriculum redesign process, as well as implications for practice.

THE MODEL CLIENT INNOVATION

In the past, students had been taught the core principles of evaluation with the aid of a North American textbook, most notably Rossi et al.'s *Evaluation: A Systematic Approach* (2004). Instructors typically drew on their own experiences as well as examples from the published—often Western—evaluation literature to ground these theoretical principles for the students. Students were later encouraged to apply the core principles they had learned to their own “evaluation client” (the program they were evaluating for their dissertation). This was often a struggle. Although the student's academic supervisor usually attended the first and sometimes second client engagement, in later engagements the combination of student inexperience and discordant power dynamics between students and clients often created tensions in the relationship; a good participatory process was lacking, which inevitably resulted in poor contextualization of the evaluation within the programmatic context.

Failing to adequately contextualize an evaluation within a relevant programmatic context is especially problematic for Made in Africa evaluation, which emphasizes partnerships among knowledge systems, evaluation actors, and stakeholders (Chilisa, 2015; Cloete, 2016; Mouton et al., 2014). Sustained partnership increases the contextual relevance of an evaluation (Chouinard & Hopson, 2016; Ofir & Kumar, 2013; Pawson & Tilley, 1997; SenGupta et al., 2004) and can be achieved by using participatory evaluation approaches (Chouinard & Milley, 2018; Cousins & Chouinard, 2012; King et al., 2007) to capture the various “voices” in knowledge generation (Carden & Alkin, 2012; Mamdani, 2016; Ndlovu-Gatsheni, 2018).
In response to these considerations, we developed the idea of a “model client" teaching intervention. This approach involved inviting a real-life evaluation client into the classroom. By doing this we sought to provide students the opportunity to “model” participatory client engagement, the collaborative co-development of evaluation questions, and the process of stakeholder-driven program theory generation in a facilitated classroom environment.

The Emerging African Leaders Program (EALP) was our first model client. The EALP is a public leadership training program for young African professionals run by the Nelson Mandela School of Public Governance at UCT. It aims to promote sustainable development and inclusive democratic governance in Africa by creating a strong cohort of ethical and courageous African leaders committed to driving change across the continent. EALP participants are drawn from applicants aged 25–35 years working in civil society, government, and business sectors, with selection based on demonstrated commitment to public-service career trajectories. Participants receive six months of coaching, a two-week residential training program, and access to a strong alumni network that aims to encourage collaboration, integration, and innovation (Camerer et al., 2017).

The objectives of the evaluation engagement were, from the client's perspective, to ensure continuous program improvement and to optimize anticipated program effects. The client was also keen to enter into a classroom environment and to learn about evaluation; this was an important part of the intervention. By building the capacity of participants as co-evaluators, we hoped to move closer toward promoting evaluation as a “way of life for all Africans” (Omosa & Archibald, 2019, p. 36). We selected the EALP for a variety of reasons: their pan-African focus in every sense of the word, their willingness to participate in a generative collaborative learning experience, their commitment to making both key program personnel and program documentation available to our students, and the alignment between the instructor’s interest in leadership development and the EALP’s macro aim.

TEACHING APPROACH

The revised module was structured so as to alternate theory, reflection, and practice seminars. In an initial theory seminar, for example, the instructor introduced the class to the EALP and facilitated a discussion with students around principles of successful stakeholder engagement and the tailoring of evaluation questions. In the next seminar, EALP representatives were invited into the classroom, and students were required to engage with the client directly under the supervision of the class instructor in a manner that successfully elicited the client’s needs and established a basis for productive collaborative engagement. In a subsequent reflective session, the instructor (present during all seminars) encouraged students to reflect on their engagement. Opportunities arose to discuss, as a class, instances in which the textbook guidelines and protocols become untenable for the EALP context. After these initial engagements, students were assigned to groups and
asked to work on different aspects of the client’s program theory, including visually mapping the program logic and identifying mechanisms of interest that might be suitable for further exploration in an evaluation context. These groups were given the opportunity to present their initial ideas to the client, and the ideas were refined through collaborative engagements with the client over subsequent seminars, providing further opportunities to arrive at a mutual understanding of the program logic and of emerging evaluation needs and approaches. This general process was repeated over a series of 11 two-hour seminars, working through the development of evaluation questions, the co-production of a program theory, and the dialogue around evaluation approach and design.

REFLECTIONS ON THE TEACHING APPROACH

Inviting a model client into any classroom raises multiple interesting considerations—some practical and instrumental, others substantive and philosophical. Case-based teaching has had a long and successful history in higher education, and the advantages of using cases to develop knowledge to solve practical problems is incontrovertible. In evaluation teaching, pluralistic teaching and learning approaches (e.g., coursework, mentorship, peer exchanges) are similarly recognized as part of the broader process to develop, reinforce, and sustain different evaluation competencies that underlie strong evaluation practice (Dillman, 2013; Naccarella et al., 2007). There is a significant difference, however, between presenting students with written case studies to stimulate debate and serve as the basis for experiments with decision making, and presenting students with an actual program director or program manager to whom they must present and represent their case. Some key reflections are presented below.

Model client vulnerability

The model client volunteered to co-participate in the teaching space to benefit from having many minds focused on their program through an evaluation lens. During the module, what became clear was the level of vulnerability the model client assumes when they take centre stage in this learning moment. They reveal themselves to the students and have a classroom of critical (constructive but critical) eyes exploring every aspect of their program. This vulnerability cannot be underestimated and, unless managed carefully, has potential to undermine the entire process of co-creation. While we discussed professional ethics with students prior to their introduction to the model client and facilitated discussions and reflection on evaluator-client relations, it was only in the actual classroom session that we truly appreciated the client’s vulnerability to the errors made by inexperienced evaluators who have no or limited prior exposure to the complexity of real-world programs. Luckily for us, engagements between students and the model client proceeded smoothly. The students were mindful and, for the most part, respectful, and they recognized the value in the opportunity to work with the client.
Data availability and sensitivity

For the learning experience to succeed, students require access to a vast array of data pertaining to the case under study. These critical data needs were discussed and agreed upon upfront during the contracting stage with the model client. In our case, the model client was generous and trusting in their willingness to share data (e.g., previous evaluation reports, participant survey responses, target short-listing criteria), but neither party was prepared for how the data needs expanded as the module progressed. The more the students learned about the program, the more data they needed. Sourcing additional resources was taxing on the model client and raised issues of how much data is enough in a learning and development space versus an actual evaluation. And related to data availability was the question of data security. The program staff took a bold step in entrusting the class with data not traditionally available in the public domain.

As a Made in Africa evaluation

One of the key themes that came out of both the #RhodesMustFall student protest movement and the Made in Africa evaluation movement was the idea of shifting the locus of knowledge production to the African continent. In our view, this principle must apply not only to evaluation practice but also to the teaching of evaluation. As Tarsilla (2014) cautions, the cost of inaction will be the continued “injecting [of] external knowledge into the circles of evaluation networks in Africa and discouraging the production of authentic African knowledge” (p. 13).

While the parallels between our approach and the core Africa-centric evaluation tenets of knowledge co-creation are notable, we are quick to acknowledge that many challenges still remain to ensure that our teaching approach truly embraces the Made in Africa tenets. We also acknowledge that many of the principles we embraced are not unique to so-called Africa-centric evaluators. The approach also resonates, for example, with practical strategies that promote evaluative thinking (e.g., role-plays, evaluation simulation, and scenario analysis) and is a variant/refinement of what typically comes under the remit of in-service learning—a wide array of experiential education endeavours that hinges on reciprocal, real-world, and real-time learning (Felten & Clayton, 2011). Even noting these similarities, however, we feel that our approach holds a key defining attribute of the shifting of the locus of knowledge production out of the Western textbook and into the African classroom. While many might disagree on the precise definition of Africa-centric evaluation, few would dispute that, first and foremost, the evaluation agenda should be led and owned by Africans (see Chilisa, 2015; Ofir, 2018).

IMPLICATIONS FOR PRACTICE

In this final section, we elaborate further on our reflections about the strengths and weaknesses of this approach, as well as how it might be taken further in future teaching and evaluation practice iterations. We feel that the learning process
that unfolded in our UCT teaching space was neither linear nor restricted to our students—it was systemic, with the ultimate aim that all parties involved walk out of the classroom “transformed.” The model client was successful in bringing a more Made in Africa approach into our curriculum as it leveraged the collaborative co-creation of knowledge. Our students demonstrated high levels of investment accountability and engagement in the various learning activities. Some of the power dynamics shifted away from instructor to the students, as the latter took on increasing responsibility for their learning. Moreover, once the class engagement phase was concluded, one of our students continued to work with the EALP under the supervision of the module instructor to evaluate aspects of the program for their Master’s dissertation. This continuity has been important in ensuring that early gains made in co-creating the evaluation process were carried through to completion with an actual evaluation project. Despite the additional work and complexity required in course preparation and implementation, the model client is now a standard feature in the course.

While we have learned a fair amount from the initial implementation, greater reflection on the intended outcomes of this approach for the different parties involved will help maximize the educational benefit and limit the risks. There was considerable risk in introducing naive learner evaluators to a model client at the onset of their academic program. These risks can be mitigated, however, with proper reflection and classroom management. The pedagogic and ontological opportunities of this classroom experience far outweigh the risks.

As instructors, being responsible for holding the space meant that we flipped between the anxiety of intervention failure and the excitement about the learning and knowledge co-creation possibilities. As we go forward, sharing the purpose of the journey with the students and the client, and bringing them more fully on board with what we are aiming to achieve given the context of the Made in Africa discourse, will help immeasurably in building a stronger basis for authentic co-creation.

One additional caution: We cannot emphasize enough the need to carefully choose the model client. Bringing a model client into the classroom is high risk, as it is difficult to predict how students will relate and connect to the client. A vested client and a relatable program implemented with sensitivity to its African roots and contexts are keys to the success of this undertaking. Socializing students in evaluator interpersonal “etiquette” prior to the engagements and sensitizing them to the core critiques that sparked the discourse of Made in Africa evaluation are also critical for the unfolding of a constructive and transformative interaction that is devoid of power dynamics. In a recent position paper on operationalizing Made in Africa evaluation, Frehiwot (2019) places the challenging of power relationships at the forefront of the development process. Adeline Sibanda, former chairperson of the African Evaluation Association, problematizes the issue succinctly in an interview in the same issue: “Decisions about what is evaluated, how, and for whom, remain largely the prerogative of the Global North. . . . Evaluation is about power, the powerful make the decisions on the above questions” (Sibanda, 2019,
As a result of shifting the locus of knowledge co-production and allowing the client to be a co-producer, rather than merely a subject, in this process, these power dynamics have the potential to be redefined. Instructors holding this teaching and learning space, however, also need to be comfortable with managing this process, which can take a life of its own, and must have the requisite skills to do so.

A final challenge involves the need to consciously and systematically move away from prescribing reading lists and core texts that are exclusively Western in their orientation. While the Western texts we have used in the past are certainly not irrelevant, a deliberate shift toward elevating African thought and intellectual leadership in the teaching of evaluation is an imperative. Drawing on locally produced and locally applicable case studies and literature to contextualize key theoretical concepts might resonate better with students. Shifting the locus of knowledge production and enhancing a critical mass of intellectual capital from an African vantage point should then be a deliberate, planned outcome led by African theorists and scholars. This has the potential to positively affect the field of evaluation, since embedding a uniquely African lens in evaluation inquiry enriches theory and practice with new insights on a multiplicity of other ways of knowing and on the promotion of credible evaluation evidence. Moving forward, we believe such teaching innovation is critical if our evaluation capacity development efforts are to unfold in a manner that ensures the production of authentic African knowledge. This will, however, require even more innovation to ensure that additional practice-based opportunities are embedded into future curriculum reforms.

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Teaching Africa-Rooted Evaluation


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If Building Trust Is Important, How Do We Teach Novice Evaluators to Do It?

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Abstract: Building trust with stakeholders is essential for conducting meaningful evaluation work. This practice note describes an instructional activity developed to help novice evaluators learn to build and maintain trust with stakeholders, and illuminates key pedagogical aspects to aid evaluation educators in using or adapting this learning activity. Relevant literature is reviewed before describing why trust is the focus, the learning context in which this activity was developed and enacted, and the learning activity itself. The practice note concludes with a discussion of four critical ingredients that are central to this learning activity and implications for evaluation teaching, learning, and research.

Keywords: evaluation education, interpersonal skills, novice evaluators, situational practice, trust

Résumé : L’établissement de liens de confiance avec les intervenants et intervenantes est essentiel pour qu’un travail d’évaluation soit significatif. Cette note sur la pratique décrit une activité pédagogique mise au point pour aider les évaluateurices et évaluateurs novices à apprendre à établir et à maintenir un lien de confiance avec les parties prenantes et souligne les composantes pédagogiques clés à considérer lors de l’utilisation ou de l’adaptation de cette activité d’apprentissage. La littérature pertinente est examinée avant de décrire les raisons pour lesquelles la confiance est au cœur de la démarche, le contexte d’apprentissage dans le cadre duquel l’activité a été élaborée, et l’activité d’apprentissage elle-même. La note se termine par une discussion de quatre ingrédients essentiels à l’activité d’apprentissage et ce qui pourrait s’ensuivre pour l’enseignement, l’apprentissage et la recherche dans le domaine de l’évaluation.

Mots clés : formation en évaluation, compétences interpersonnelles, évaluatrices débutantes, évaluateurs débutants, pratique situationnelle, confiance

This practice note describes an instructional activity developed for helping novice evaluators learn to build and maintain trust with stakeholders, and illuminates key pedagogical aspects. I first review relevant literature on interpersonal skills and then describe the learning context in which this activity was developed and enacted. The practice note concludes with a discussion of four critical ingredients that are central to this learning activity and implications for evaluation teaching, learning, and research.

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enacted, reasons for the focus on trust, and the learning activity itself. The practice note concludes with implications for evaluation teaching, learning, and research.

**BRIEF LITERATURE REVIEW**

Evaluation is a social practice, meaning that human interactions and relationships are at its core. This is one reason why interpersonal skills in evaluation are important (King & Stevahn, 2013; Kirkhart, 1995; Patton, 1978). Professional organizations such as the American Evaluation Association (AEA) and the Canadian Evaluation Society (CES) have sought to explicate what is included under the interpersonal skills umbrella. CES (2018), for example, defines interpersonal skills to include a focus on social and personal skills, communication, and the ability to interact effectively with all stakeholders. These interpersonal competency explications are based on a literature generated by scholars and practitioners with a collaborative (Cousins et al., 2019) or transformative orientation1 to evaluation practice (Cram, 2009; Hood et al., 2015; House & Howe, 1999).

Interpersonal skills influence evaluation practice. Evaluation use (Acree & Chouinard, 2019; Alkin & King, 2017), the validity of evaluative inferences (Griffith & Montrosse-Moorhead, 2014; Kirkhart, 2005), and the degree of cultural competence are all impacted by evaluators’ interpersonal skills and the axiological assumptions evaluators bring to the work (Cram, 2009). Writings also call attention to the link between interpersonal skills and access to data, data quality, stakeholder resistance, and credibility (Donaldson et al., 2015). This work, for example, has shown that inappropriate (or no) use of interpersonal skills has led to stakeholder resistance to evaluation in general, and to refusal to participate in data-collection efforts.

While the importance of interpersonal skills is well established, more work must be done by evaluation educators. King and Stevahn (2013) note that evaluation educators have not drawn much from well-established social practice theories in psychology to inform how they support interpersonal skill development in future evaluators. Clinical psychology, for example, has long recognized and researched the importance of interpersonal skills to professional practice, and thus explicitly embeds their development within education programs (Grossman et al., 2009). And yet, consistent with King and Stevahn’s claim, several research studies find that interpersonal skill development is least likely to be addressed in formal evaluator educator programs (Dewey et al., 2008; Galport & Azzam, 2017; LaVelle, 2014). Echoing King and Stevahn, this practice note is rooted in a belief that connecting evaluation and clinical psychology teaching literature has the potential to inform interpersonal skill development in novice evaluators.

Moreover, there is little teaching literature focused on helping others develop these skills within evaluation. Preskill and Russ-Eft’s (2016) book includes a few skill-building activities in the interpersonal skills domain, all centred narrowly on stakeholder resistance, evaluation politics, or communication. These one-shot activities, while a helpful starting point, do not provide the ongoing, purposeful, sustained learning needed to develop everything included under the interpersonal

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skills umbrella. This practice note provides an example of a more ongoing, purposeful, sustained learning activity.

THE INSTRUCTIONAL ACTIVITY

Why focus on trust

This activity is grounded in research, theory, and praxis emanating from clinical psychology on interpersonal skills (Horvath et al., 2011; Norcross, 2011). As noted in a comprehensive synthesis of clinical psychology literature, relationship-building theories make a distinction between the process of relationship-building, using interpersonal skills such as empathy, goal consensus, collaboration, responsiveness, cultural competence, and the outcomes of appropriate relationship-building skills, such as trust, and there is much empirical support for these distinctions (Norcross & Lambert, 2011). The instructional activity described here assumes the same distinction, meaning it assumes trust in evaluation comes from appropriate use of interpersonal skills. Moreover, within clinical psychology, it is empirically documented that many means (processes) are effective at building trust (Norcross & Lambert, 2011). This instructional activity also assumes the same distinction, meaning that it assumes there are many ways in which interpersonal skills can be used to build trust. This framing provides a common anchor for learning across novices, which is why trust is the focus, and also provides a way for interpersonal skill use to be contextually tailored.

Learning context

The context for this learning activity is a university-based program that prepares future evaluation scholars, educators, and practitioners through its Master’s and doctoral programs. The program includes three courses devoted to the evaluation profession and to practice, with other courses focused on technical methods. This activity is situated within and embedded throughout the second course, a semester-long evaluation practice course, where students are required to navigate, for the first time, the dynamic interplay between theory, research, methods, and praxis with real stakeholders to produce an evaluation proposal.

Learning activity description

As the course instructor, to set the stage for the novice evaluators, I write a letter for the novice evaluator teams to share with potential partner organizations. It describes the class, its aims, and the expectations for the evaluators and partner organizations. It also purposefully calls attention to the audio recording of meetings and the sharing of these recordings—with whom, how, and for what purpose. Along with this letter I include an evaluation partnership agreement, in which an authorized representative of the partner organization acknowledges the general purposes of the collaboration and the particulars of involvement, including audio recording, verifies that questions have been answered satisfactorily, and agrees to
move forward with the partnership. Only after this letter is signed does evaluation planning begin.

Each novice evaluator team has three to four self-selected students. Rather than prescribe a particular evaluation approach, teams work with partner organizations to determine the evaluation purpose, key questions, and the approach that best fits the evaluation context. Once an approach is selected, teams are required to use the seminal texts associated with that approach. Depending on the approach selected, discussion and use of interpersonal skills in service of trust-building varies significantly. To address this variability, students co-create instructional resources, namely audio recordings of meetings with various stakeholders within the partner organizations. Recordings can and often do include evaluation commissioners; program developers, managers, and staff; and those served by the program. These recordings are shared through a password-protected learning management system. Students are also required to read a chapter by Horvath et al. (2011), a comprehensive mixed-method review of trust research in clinical psychology. To facilitate student sense making from the chapter and set the stage for later work on trust building, students are asked to come to class prepared to discuss the following questions:

1. Horvath et al. discuss research on the process of developing trust. How does that research help us think about how to develop trust in evaluation?
2. What are the characteristics of trust building in evaluation? In other words, if you listened to an audio recording of a meeting between an evaluator and a stakeholder(s), what would you hear that would tell you trust was being built? Being hindered? Being resisted?

Throughout the semester, I devote class time to helping students learn to engage in trust-building practice. Each team shares several recordings from the semester. Prior to these class sessions, students are instructed to listen to recordings from other teams, to note instances of trust building, hindrance, or resistance, and to brainstorm potential suggestions to address trust hindrance and resistance. Later in the course and in instances in which the same people are on multiple audio recordings, students are instructed to write down their reflections on how trust has changed over time in this evaluation with this person or set of people. I listen to the recordings with the same prompts in mind, and contribute my observations and model reflective practice during class. This work is unscripted, meaning it changes year-to-year with the students, evaluation partners, and recordings.

Class sessions are a mix of small- and whole-group work. If time allows, I use a Think-Pair-Share cooperative discussion strategy in which students first work independently to answer prompts, and then small groups collaborate to discuss each prompt and generate talking points for a whole-group discussion (Lyman, 1981). Other times, I use the Jigsaw cooperative discussion strategy, where different groups focus on different prompts, with each group facilitating a whole-class discussion around their prompt and points to consider (Aronson & Patnoe, 1997).
Regardless of strategy, my instructional goals are the same: to help students recognize, in the moment, instances of trust building, hindrance, and resistance; and to build their capacity to build trust throughout an evaluation project.

DISCUSSION

Informed by evaluation and clinical psychology literature, I developed a reflective, ongoing, intentional learning activity to help novice evaluators with their trust-building practice. Four ingredients are critical here: (1) positioning trust-building as a core practice, (2) cultivating psychological safety in the classroom, (3) developing and asking meaningful questions, and (4) helping students identify aspects of trust-building practice.

Critical ingredient 1: Trust-building as a core practice

One key assumption embedded in this learning activity is that trust building in evaluation is a core practice. To make this explicit, students are introduced to the concept of core practices, or practices focused on helping novices develop their knowledge, skill, and professional identity in the process of learning to practice (Grossman et al., 2009). Next, students are presented with an argument for why trust building is a core practice. This includes the existence of a plethora of research outside of evaluation on the need to develop trust and how it results in positive outcomes (Horvath et al., 2011), and how trust is relevant in evaluation and plays an important role in the quality of the process and outcomes of an evaluation (Hood et al., 2015; Thomas & Stevens, 2004). Building trust does not diminish integrity and complexity. Moreover, building trust occurs throughout the evaluation process and with high frequency, and there is no one-size-fits-all approach to building it. It is enacted across different contexts and evaluation approaches and can be taught to those new to evaluation. In this way, the process of learning how to build trust helps novices learn more about evaluation, evaluating, and evaluators.

Critical ingredient 2: Cultivating psychological safety in the classroom

Research has established that psychological safety, or belief about whether a particular context is safe for risk taking, is especially important for learning (Edmondson, 1999; Schein, 1993). Co-constructed course norms are one teaching strategy for creating a psychologically safe learning environment (Kegan & Lahey, 2001). Examples of norms used in this course include “be honest with confusions,” “share personal experiences to enrich learning,” “lean into discomfort,” and “recognize complexity.”

Critical ingredient 3: Developing and asking meaningful questions

Extant research shows that question quality can make a difference in learning (Rosenshine, 2012). Questions posed have to elicit student thinking and help students build on that thinking in ways that extend learning for everyone (e.g.,
How Do We Teach Novice Evaluators?

The questions posed in this learning activity are Socratic questions (Table 1), where the instructor adopts a novice mindset and assumes that knowledge is constructed through asking questions (Dillon, 1990). As is true for anyone using Socratic questioning as an instructional tool, the questions one asks are dependent on the discussion and educative materials being used.

Critical ingredient 4: Identifying aspects of trust-building practice

An important part of this learning activity is helping students understand what is meant by trust building and maintenance in evaluation. Because there is no empirical work within evaluation that focuses on trust building with the explicit aim of making it visible to novices, clinical psychology literature is used. This literature helps novices understand that trust building is both emergent and the result of mutual partnership and collaboration. Trust building is dynamic in the sense that it can, and often does, ebb and flow over time, both in terms of the quality of trust building and the aspects that influence it. It is thus always in process and never finished. It is framed, moreover, as something that can occur through multiple pathways, not through one single or specific approach. At a minimum, trust building requires three elements: a common understanding of purpose, shared agreement on processes and procedures in service of that purpose, and appropriate use of interpersonal skills.

IMPLICATIONS FOR EVALUATOR EDUCATION TEACHING AND RESEARCH

Several important pedagogical implications stem from this work and are important for those considering using or adapting this technique. One is that the

<table>
<thead>
<tr>
<th>Socratic question type</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clarifying</td>
<td>How does this interaction relate to our discussion of trust building?</td>
</tr>
<tr>
<td>Probing</td>
<td>What could we assume instead about why resistance to this aspect of the evaluation plan is occurring?</td>
</tr>
<tr>
<td>Probing with evidence</td>
<td>What do you think contributes to trust being built? Why? What evidence is there that this is happening in this situation?</td>
</tr>
<tr>
<td>Perspective taking</td>
<td>What is another way to interpret this conversation between the evaluators and this stakeholder/these stakeholders?</td>
</tr>
<tr>
<td>Consequential</td>
<td>What are we assuming about trust building in this circumstance? What is the consequence of this assumption?</td>
</tr>
<tr>
<td>Meta-questioning</td>
<td>Why do you think I asked the question about who was actively engaged in the conversation and who was not?</td>
</tr>
</tbody>
</table>

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CJPE 35.3, 384–394 © 2021
framing of trust building as a core evaluation practice is grounded in a socio-cultural teaching and learning philosophy (Chaiklin & Lave, 1996; Shulman, 2005). Education rooted in this perspective privileges understanding, skills, and knowledge and at the same time also recognizes that personal and professional identities, prior experiences, and context play a role in our practice. For this reason, learners are active participants in the learning process, and knowledge is co-constructed by novices and experts. The pedagogical skills required by an instructor for this learning activity necessarily differ from those required, for example, in a lecture-based environment. Two such examples are the ability for an instructor to cultivate psychological safety in the classroom and to develop and ask meaningful questions.

Psychological safety is important for this learning activity for several reasons. This learning activity is intentionally designed for teams to open up and share their practice. This is easier when things are going well and less so when they are not. Working with stakeholders for the first time presents the first real opportunity for novice evaluators to fail, and they need to be able to fail safely, fail early on, and learn how to use failure for learning. This can be especially difficult for students at the graduate level who have excelled academically. Moreover, it can be exacerbated by imposter syndrome, a persistent and untrue psychological thought process where one doubts one’s own accomplishments and, because of this doubt, fears being found out as a “fraud.” Prior research shows that imposter syndrome is widespread in graduate education, with higher rates among women, Black, Indigenous, Latinx and people of colour, and first-generation students (Parkman, 2016).

Co-constructed norms are one pedagogical tool that can be used to cultivate an atmosphere of psychological safety among students. Those new to co-creating course norms are directed to Kegan and Lahey (2001), which provides guidance and practical tools that can be adopted to facilitate this process. Kegan and Lahey note, for example, that the co-construction framing shifts the learning environment to one where everyone (not just the instructor) has the responsibility for upholding norms and calling attention to instances in which norms are not being authentically honoured. This shifting of responsibility to the collective also shifts students’ interpersonal dynamics, “unfreezing” the things that get in the way of learning so that learning can occur.

Asking meaningful questions is also important for this learning activity. There are different questioning models to help guide instructors both within (Smith et al., 2015) and outside (Dillon, 1990) evaluation. This learning activity was designed using Socratic questioning, which instructionally requires that educators are willing and know how to assume a novice orientation, interpret in the moment what students understand and what they do not, be able to think quickly on their feet about what question makes sense instructionally, and tolerate uncertainty, since neither questions nor answers can be anticipated in advance. Prior education research on questioning practices has shown that questioning models are more difficult for those new to teaching or new to this questioning method because they do not yet have the practical knowledge about teaching and learning that comes from teaching itself (Lunenberg & Korthagen, 2009).
Socratic questioning, moreover, was intentionally selected for this learning activity because of its alignment with Argyris and Schön’s (1996) theory of action framework, which suggest that our practices are composed of what individuals say (i.e., espoused beliefs and assumptions) and what they do (i.e., enacted beliefs and assumptions) and that there are often unnoticed discrepancies between the two that “freeze” learning. The result of unnoticed and unquestioned discrepancies is a focus solely on learning how to do something at an acceptable or optimal level. However, if these discrepancies can be illuminated and unpacked, it paves the way for practitioners to focus on learning why one would take a particular action, whether beliefs, assumptions, and action are in alignment, and what is getting in the way of learning and alignment. In sum, Socratic questions help facilitate students moving from know-how to know-why (Argyris & Schön, 1996).

Reflection in action and reflection on action, which are part of Argyris and Schön’s (1996) theory of action framework, do not come easy to novice evaluators (Smith et al., 2015). At the beginning, while students get the idea in theory, many have limited evaluation experiences from which to draw and little to no training in engaging in reflective practice. At the beginning of the semester, I thus rely quite a bit on my notes from the Horvath et al. (2011) chapter and the first round of audio recordings to facilitate the discussion and make visible aspects of trust-building practice (reflection on action). Doing so also models for students how to use these materials for the purpose of cultivating their own reflective practice. As the semester progresses and students become more comfortable sharing and better able to recognize various parts of trust building in practice, I use my notes to keep track of what has already been discussed, and what aspects from my notes, if any, need to be further unpacked. Moreover, this allows space to begin to have conversations about their in-the-moment learning (reflection in action) because students are more deliberate about what they are doing in practice and why, and are more fully able to articulate this. Research has shown that these kinds of meaningful reflection activities broaden students learning along the academic, social, moral, personal, and service dimensions of practice (Hatcher et al., 2004; Smith et al., 2015).

While these pedagogical implications are important, several future directions emanate from this work. It would be interesting to understand what other strategies beyond co-construction of norms could be used to create a culture of psychological safety in the classroom, or how different questioning methods influence the process and outcomes of student learning in this instructional activity. It is also possible that this pedagogical activity could be used beyond the classroom and adapted by practitioners wishing to engage in reflective practice, much like clinical psychologists do once they earn their degrees. What adaptations are needed to transfer this learning activity outside of the graduate learning environment?

To adapt a well-known quote—good evaluators are made, not born. And good evaluators are more than methodological technicians. To the extent that we believe both of these statements to be true, it means reframing evaluator education to focus on all aspects of good practice, and that includes trust-building practice.
NOTES

1 Philosophically, these two orientations are rooted in the pragmatic or transformative paradigm, respectively, which has implications for their enactment in practice (Mertens & Wilson, 2019).

2 The clinical term for trust is *alliance*, and as such it is the preferred term used in research studies, while *trust* is the preferred term in practitioner-oriented writing (Horvath et al., 2011).

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**AUTHOR INFORMATION**

Bianca Montrosse-Moorhead is an associate professor of evaluation at the University of Connecticut, where she trains future practitioners and scholars. Her research centres on evaluation education, methodology, and practice.
Helping Students Reflect on Their Interpersonal Skills: The Team Performance Scale (TPS)

Chris Y. Lovato and Graham Shaw
University of British Columbia

Abstract: Many instructors of program evaluation incorporate team-based service projects into their courses. What is often overlooked is that it provides a golden opportunity for students to reflect on the interpersonal skills necessary for teamwork. This paper explains how we leveraged service project working groups to include reflection on interpersonal skills. Minor changes were made to the Team Performance Scale (TPS), a tool used for team-based learning in medical education. We found it to be a practical and effective way to engage students in reflecting on behaviours associated with a high functioning team. This practice note will be of interest to instructors using team learning approaches to teach key competencies in program evaluation.

Keywords: interpersonal skills, teaching evaluation

Like many others who instruct program evaluation, we have incorporated practical experiences into our course on program evaluation. For example, we use a service assignment that involves students working in small groups to develop an evaluation proposal for a real program in a government or non-government organization (LaVelle et al., 2020; Trevisan, 2004). This kind of experience represents...
a crucial aspect of evaluation training (Gredler & Johnson, 2001) because it offers students an opportunity to apply what they learn in the classroom to a real-world setting. Yet what is often overlooked is that it also provides a golden opportunity for students to reflect on their interpersonal skills in working effectively in a team. This paper explains how an instructor and a teaching assistant leveraged a group proposal assignment to include reflection on interpersonal skills.

INTERPERSONAL SKILLS: “SOUGHT BUT NOT TAUGHT”

Interpersonal skills are identified as a key competency area by the Canadian Evaluation Society (CES, 2018) and the American Evaluation Association (AEA, 2018). This includes a range of skills such as communication, building trust, negotiation, managing conflict, collaboration, and diversity as essential for competent evaluation practice. Although there is wide agreement regarding the need for interpersonal skills, there appears to be a discrepancy between “what is taught and what is sought.” In a study examining how well the competencies students gained in graduate school matched the competencies valued by employers, interpersonal skills emerged as the area with the largest discrepancy. Employers noted the need for interpersonal skills more than any other competency, yet former students ranked interpersonal skills near the bottom in terms of the skills they gained in graduate school (Dewey et al., 2008). Galport and Azzam (2017) confirmed this gap when they found that practicing evaluators most often rated interpersonal competencies as the professional area where they most needed training.

INTERPERSONAL SKILLS IN TEAM-BASED LEARNING

While team-based learning activities have been a part of teaching for a long time, over the past decade, team-based learning (TBL) has emerged as a specific pedagogical approach to team learning for educating professionals. It is widely applied in medical education and has been used in training across the health professions, business, mathematics, and other disciplines (Betta, 2016; Dearnley et al., 2018; Haidet et al., 2014; Hanley, 2020; Peters et al., 2020). In TBL, students are placed in “permanent groups” so that they develop as a team. Students receive multiple low-stakes “readiness assessments” to ensure they grasp key concepts (typically in the form of short individual and group quizzes), and assignments require students to work collectively on application of course content (Michaelsen & Sweet, 2008).

TBL is most appropriately used in courses where students are required to understand a significant body of information and the primary goal is to apply or use the content (Swanson et al., 2019). It is recommended as a teaching strategy for enhancing professional competencies related to interpersonal communication skills (Espey, 2018). A systematic review of TBL literature in nursing and midwifery cited a number of studies that reported increasing interpersonal skills as an outcome of TBL (Dearnley et al., 2018), and similar findings have been reported in medical education (Zgheib et al., 2016).
TEACHING CONTEXT

We teach a graduate-level course called “Program Planning and Evaluation.” The course is an elective in the Masters of Public Health (MPH) program, in the School of Population and Public Health, University of British Columbia. The course prerequisites are epidemiology and statistics. There are typically 30 students enrolled in the course. Students receive instruction on program evaluation both in the classroom and online (via Canvas) over a 13-week period. Topics include program planning models, planning and designing processes, communicating and reporting of results, and managing an evaluation.

We assigned students to small work teams (four to five students each) during the second week of the course. Similar to TBL, the teams were organized to maximize diversity within groups while still maintaining a balance of experience and research skill across groups (e.g., PhD students were dispersed across groups). Unlike TBL, this course did not involve the use of readiness assessments to test knowledge. As with TBL, groups worked together on weekly activities requiring application of concepts, including a service project worth 30% of the final grade. The service project required teams to apply course content by developing an evaluation proposal for a public health program currently being planned or implemented.

The primary instructor works with government and non-government agencies to arrange for these placements. Community organizations identify a program that they would like to have evaluated, and the students develop an evaluation proposal over a five- to six-week period. The agency is asked to provide a sponsor who meets with the group at least three times: (1) at the beginning to explain their needs, (2) a few weeks later to discuss the general approach students have identified, and (3) at the end of the term to receive a presentation and a copy of the final proposal. These meetings typically last one hour. Student groups identify one member who handles all communication with the sponsor. The instructor is copied on all student communication.

THE TEAM PERFORMANCE SCALE

To facilitate individual and group reflection on the effectiveness of students working in teams, Thompson et al. (2009) developed a tool called the Team Performance Scale (TPS) for use in medical education courses. The TPS is a student self-report instrument that focuses on levels of engagement by all team members, processes for inviting deep conceptual discussion that respect and value diverse perspectives, and the strength of team identity and commitment. The 18-item survey is open access and can be found in Thompson et al.

The item response scale ranges from “none of the time” (scored 0) to “all of the time” (scored 6). The creators of the scale first developed a set of 30 items based on a literature review of characteristics of high-functioning teams. Through a process of psychometric testing and validation with students from multiple medical schools, they used factor analysis to reduce the instrument to 18 items.
that fit into a single factor structure with high internal consistency (Cronbach’s alpha = 0.97). Examples of stems include “When team members had different opinions, each member explained his or her point of view; my team elicited multiple points of view before deciding on a final answer; my team used several techniques for problem solving (such as brainstorming) with each team member presenting his or her best ideas.” We made minor editorial changes to the survey and used the TPS to help facilitate student teamwork. While our course was not designed as a complete TBL course, permanent diverse teams were formed to work on a real-world application project, suggesting that the TPS would add an important aspect to students’ learning.

To incorporate the survey into our teaching, we gave an in-class lecture about the concept of team service projects, behaviours associated with effective teams, and how the team proposal assignment addressed key evaluation competencies. The need to take time to reflect on group processes was emphasized and tensions within work teams were described as a normal occurrence that can be positive and productive.

Approximately two weeks after student teams began working on their evaluation service projects, the TPS was introduced and students were asked to fill them out individually, in class. Class time was then provided for students to compare and discuss responses in teams within the privacy of their own work group. Scores were not compared between teams or collected as data. Teams were encouraged to discuss results and identify areas where the instrument suggested that work would lead to improved team function. The instructors made themselves available for questions or consultation. The primary instructor observed the group interactions from the front of the classroom and intervened if support appeared to be needed.

INSTRUCTOR’S REFLECTIONS

As an experienced professor, I have been incorporating group service projects into my courses for many years. Students consistently expressed very positive sentiments about those projects. Their feedback indicated that they view this activity as one of the most important experiences in their program. Complaints, when received, were most often about unequal contribution of team members. I also heard some grumbles about “getting things done” and inefficient group processes.

While “interpersonal skills” and “working collaboratively” are stipulated as key competencies, as a teacher of evaluation I recognized that I had been lax in defining behavioural indicators of those competencies. Some, but not all, of my students have work/life experience that has taught them those skills and some have more developed skills than others. I was interested in integrating a low-stakes, non-intimidating activity into my course that facilitated reflection and development of interpersonal skills necessary for evaluation practice and strengthened students’ ability to successfully complete a team assignment.

In searching the literature for something that would help me articulate the behaviours associated with healthy work-team functioning in a post-secondary setting, I ran across the *Team Performance Scale* (TPS). I chose to use this instrument because it is based on research about high-functioning teams, it has favourable psychometric properties (i.e., construct validity and reliability), it was developed specifically for university students, and it is simple and quick to administer.

Thus far, I have used the TPS as a way to specify key behaviours that relate to good team functioning, engage students in reflecting on their individual performance, and engage work groups in reflecting on performance as a group. The TPS allows students to identify those areas in which they need to improve in order to function well in completing their project.

Students report that they find the TPS exercise engaging and valuable. It seems to refresh or enhance their understanding of what it takes to develop a healthy and effective working group. It also provides a framework for a structured conversation that focuses on specific expectations and accountabilities. I have observed that they are highly engaged and take up the challenge of reflecting openly about how their different contributions and perspectives can lead to a better team outcome. As one student stated, “I have been in many classes in university that required group work, but this is the first class I have taken that has a focus on team building and working together to bring out people's strengths.”

I have found that a team-based service project provides opportunities to incorporate instruction and practice on working in a group and gives students the real-world experience of working collaboratively. The items specify feasible behaviours for a work group. The TPS helped me to specify what behaviours lead to working successfully in a team.

**TA’S REFLECTIONS**

I have enjoyed using the TPS as a tool to promote discussion and reflection among student groups. I find that this approach engages students and makes the discussion with peers meaningful. It focuses discussion on the real and present experience of a shared project and engages their emotions by drawing attention to how they are being perceived by their peers. While the ultimate aim is to build teamwork skills for later program evaluation work, the application in an assignment provokes explicit questioning around the strengths of team members and how they each contribute.

Not infrequently, there is a group that fails to perform on a group task. Members of the group can enter a non-productive cycle of blaming one member or each other. I believe that presenting interpersonal skills as a necessary skill in evaluation and using the TPS to highlight some potential problems makes it clear to students that we expect them to deal with the interpersonal challenges inherent in group work. In previous courses, we presented excellent material about working in groups, but students did not seem to connect with the material in the way they did using the TPS.
CONCLUSION

The TPS is a practical and effective way to engage students in reflecting on the specific behaviours associated with a high-functioning team. We have found that students are open and receptive to using the survey and find it useful. One of the limitations of the way in which we structured this exercise was that we did not include a facilitated discussion to get at the heart of the process; nor did we facilitate group conversations about assumptions that teammates often make about themselves and others. There may be unintended negative effects of leaving the discussion as private to their group. A second limitation is that we do not know the extent to which the TPS self-reported behaviours reflect actual behaviour. Nevertheless, in a teaching setting, the instrument provides students an opportunity for reflection, awareness, and accountability for interpersonal behaviours that are critical to successful evaluation practice.

In the future, we plan to explore these and other possible issues by conducting a focus group post-assignment to gather more specific feedback on how this activity can be improved to meet student needs. We also want to do further work to explore what issues came up most frequently, where students feel stuck, and what might be done to assist them in moving forward. A cautionary note about team-based projects: There remain downsides to teamwork and some students simply don’t like it. Balancing team assignments with other individual assignments can help address this issue.

In conclusion, interpersonal skills have been identified as a key competency for evaluators. Despite their critical role in professional practice, these skills are rarely addressed in graduate training programs. There are a range of approaches and strategies used to teach evaluation (King & Ayoo, 2020). Many evaluation courses involve team-based learning, either by course design or through team activities. These approaches provide an ideal opportunity for students to learn about, practice, and reflect upon the skills needed to be part of an effective evaluation team. We have found the TPS to be a practical and effective tool to facilitate students’ learning in this important competency area.

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Helping Students Reflect on Their Interpersonal Skills


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Using People Styles for Interpersonal Competence:
Encouraging Purposeful Reflection on Communication Behaviours

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Abstract: This article revitalizes the idea of “soft skills” as an important part of evaluator training by reflecting on use of the People Styles Assessment Inventory as a reflective exercise in a course with Master’s- and PhD-level evaluation and measurement students. It provides an overview of recent literature surrounding interpersonal competency in evaluation, highlighting the need for, and lack of emphasis on, interpersonal skills in evaluation training; presents the teaching-practice context for engaging in the People Styles assessment and reflective activity; describes the People Styles model; and reflects on use of the model for training future evaluation practitioners.

Keywords: competency, evaluator training, interpersonal skills, people styles, reflective practice

Résumé : Le présent article revitalise le concept des « compétences générales » comme partie intégrante de la formation en évaluation en se penchant sur l’utilisation du People Styles Assessment Inventory comme exercice de réflexion dans un cours de maîtrise ou de doctorat en mesure et évaluation. Il offre un survol de la littérature récente sur les compétences interpersonnelles en évaluation, mettant l’accent sur l’importance des compétences interpersonnelles dans la formation en évaluation (auxquelles très peu d’attention est actuellement accordée) ; présente le contexte d’enseignement requis pour réaliser l’activité de réflexion et d’évaluation People Styles ; décrit le modèle People Styles ; et se penche sur l’utilisation du modèle pour la formation de futures évaluatrices et de futurs évaluateurs.

Mots clés : compétences, formation en évaluation, compétences interpersonnelles, people styles, pratique réflexive

“Who am I and what, if anything, can I do about it?”
—Aldous Huxley

Soft skills are one of the more “assumed” evaluator competencies. Though evaluators need a balance of soft and technical skills to meet the needs of the ambiguous
and diverse contexts in which they work, the process of becoming a professional evaluator is often focused on technical and theoretical knowledge. In a book aptly named *Evaluation for a Caring Society*, Hamington (2018) notes that “there is more to the story of professional competency than the generalized knowledge of technical specialization” (p. 41). To be responsive evaluators, we must be keenly attuned to interpersonal skills. A 2008 study on evaluator competencies found that employers cited a need for interpersonal skills more than any other competency, and that entry-level candidates often lacked these skills (Dewey et al., 2008). And a 2016 gap analysis conducted with American Evaluation Association (AEA) members pointed to interpersonal competence as an area most in need of training (Galport & Azzam, 2016).

The People Styles model and accompanying self-assessment, developed by Bolton and Bolton (2009), describes four types of communicators based on their typical use of emotionally responsive and assertive behaviours. This article shares the experience of utilizing this model with graduate evaluation students. Students interact with the model, comparing and contrasting their own people style with those of their classmates, their clients and colleagues, and even their friends, family, and significant others, while connecting their use of the model to reflection for self-awareness and improvement (Smith et al., 2015; Smith & Skolits, in press). This article summarizes recent literature surrounding interpersonal competency in evaluation, overviews the People Styles model, describes the teaching practice context for engaging in the People Styles assessment and reflective activity, and reflects on the use of the model for training future evaluation practitioners.

**INTERPERSONAL COMPETENCY IN EVALUATION**

The Competencies for Canadian Evaluators, updated in 2018, provide a starting point for understanding the role of interpersonal skills in evaluation. These competencies are situated under five domains: Reflective Practice, Technical Practice, Situational Practice, Management Practice, and Interpersonal Practice. Under Interpersonal Practice, the associated competencies “focus on the social and personal skills required to communicate and interact effectively with all stakeholders” (CES, 2018) and include the following:

- using communication strategies appropriate to the cultural, linguistic, social, and political context;
- demonstrating effective and appropriate written and visual communication skills;
- demonstrating effective, appropriate, and respectful verbal and non-verbal communication skills;
- using a variety of processes that result in mutually negotiated agreements as well as shared understandings and consensus building; and
- building partnerships within the evaluation context.
Each competency interacts with our ability to be flexible (Bolton & Bolton, 2009) and responsive to the communication behaviours of our collaborators, and to have a nuanced understanding of the context in which we operate.

As evaluators, we are in a constant communicative role: from pre-evaluation, where it is critical to listen to the needs of the client and set the necessary boundaries and contract for evaluation work, to post-evaluation, where the evaluator may act as a diplomat, providing key findings in a way that helps individuals take the information and act accordingly (Skolits et al., 2009). We communicate with a variety of individuals over the course of an evaluation, from different types of stakeholders to funders, practitioners, program beneficiaries, and evaluation colleagues. Handling diverse perspectives in an authentic, thoughtful way requires an interpersonally adept evaluator. According to LaVelle and Donaldson (2015),

> Evaluators need to acquire additional skills to help fulfill the responsibilities of evaluative work, including interpersonal competence, communicating with clients, negotiating political situations, managing team members, successfully conducting projects, capacity building, context-responsive data displays, responding to requests for proposals, and so forth. (p. 41)

We must systematically design and conduct an investigation, and use technical expertise to get us there, but the real challenge is triangulating what we learn into the program contexts in which we work, and conveying that information to the participants in a way that enables them learn something from the findings.

Unfortunately, research over the past fifteen years has found that evaluation professionals lack interpersonal competency (Dewey et al., 2008; Galport & Azzam, 2016). Dewey et al. (2008) surveyed job seekers and employers, looking at what evaluators acquire during training and what employers look for in applicants. They found that employers mentioned the need for interpersonal skills more than any other set of skills, but that this skillset was the one most lacking among entry-level candidates hired for these positions. Job seekers, on the other hand, when asked to identify their weaknesses, never mentioned interpersonal skills. This may be due to a lack of awareness of the importance of these skills, reluctance to admit deficiency, or a lack of awareness of this deficiency.

Similarly, Galport and Azzam (2016) conducted a gap analysis with AEA members to understand practicing evaluators’ perceptions of evaluation competencies and of the need for additional training in both interpersonal competence and reflective practice. The competencies of reflective practice and interpersonal practice are intricately intertwined. Knowing oneself as an evaluator is a key component of the reflective process (Smith et al. 2015; Smith & Skolits, in press; Stevahn et al., 2005), and understanding how you interact with others, in terms of both assertiveness and responsiveness, can influence interpersonal dynamics (Bolton, 1989; Bolton & Bolton, 2009).
THE PEOPLE STYLES MODEL

In People Styles at Work, Bolton and Bolton (2009) present a descriptive model and reflective tool for interpersonal communication that was developed in the Western context and has been used in industrial psychology and organizational trainings for almost 40 years (May & Gueldenzoph, 2006; Merrill & Reid, 1981). They note that 75% of the population differs from us in their communication behaviours, which can produce difficulties in communication situations. Many people think differently, decide differently, express their feelings differently, handle conflict differently, and assert themselves differently than we do. They outline a reflective self-assessment based on two observable constructs: assertiveness and emotional responsiveness. The latter portion of their text focuses on what they call “style flex” (Bolton & Bolton, 2009), or being interpersonally versatile (Merrill & Reid, 1981) in communication situations. In line with the CES competencies, the People Styles model capitalizes on being flexible, adaptable, and responsive to a communication situation.

**Assertiveness**

A person’s assertiveness level is determined by the level of directness or forcefulness they express through their behaviours. Importantly, high assertiveness does not equate to aggressiveness, and low assertiveness does not equate to subservience. More assertive people might exude more energy, speak more loudly, or decide more quickly, while those with less assertiveness might speak more softly, be less confrontational, or exert less pressure for action.

**Emotional responsiveness**

A person’s emotional responsiveness is determined by their expression and awareness of their own and others’ emotions. Of course, according to Bolton and Bolton (2009), someone who is highly emotionally responsive does not necessarily “let it all hang out,” and someone low in responsiveness does not necessarily lack emotion. More emotionally responsive people might be more facially expressive, express their feelings more openly, gesture more freely, or even dress more casually. Less responsive people might be more reserved in their behaviours, use less small talk, seem more task-oriented, or be more structured with their time.

**The four People Styles**

The challenge of using the People Styles model is to see yourself as others see you (Bolton & Bolton, 2009). The model focuses on habitual behaviours rather than personality, including a person’s gestures, inflection, facial expressions, and other observable characteristics. According to the authors, this assessment, consisting of 18 paired statements, operates better than personality assessments due to its basis in observable, habitual behaviours. The aim is to choose the statement in each pair that best describes the way you think others see you. The tallying of responses to each statement provides four scores, with two representing responsiveness and
two representing assertiveness. The score then places you into one of four categories: Analytical, Amiable, Driver, or Expressive.

According to Bolton and Bolton (2009), each People Style makes up approximately 25% of the population, and each has unique strengths and weaknesses. The assessment is non-judgmental (Merrill & Reid, 1981); no style is better than another. Following is a brief description of each People Style; Table 1 (adapted from Bolton & Bolton, 2009) provides a quick snapshot of the styles’ strengths and of what overuse might look like.

**Analyticals**

These individuals fall low on both the responsiveness and assertiveness continuums of the People Styles model. They crave quality over quantity, enjoy data, rarely act on impulse, and are more punctual and task-oriented. They are the quietest of the styles, provide a lens of complexity, and can be hard to read.

**Amiables**

These individuals fall low on the assertiveness continuum but high on the emotional responsiveness continuum. They are more empathetic, enjoy working with others, are less likely to be power hungry, speak more about people and emotions than tasks or deadlines, appear to be relaxed or “low key,” are diplomatic and tactful, enjoy routine, and may be reluctant to tell it like it is.

<table>
<thead>
<tr>
<th><strong>Table 1. Strengths and overuse of People Styles</strong></th>
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<tr>
<td><strong>Strengths</strong></td>
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<td>-----------------------</td>
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<tr>
<td><strong>Drivers</strong></td>
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Drivers

Drivers are low in emotional responsiveness but high in assertiveness. They are oriented toward the bottom line, are fast-paced and erect-postured, manage their time, have serious facial expressions, do a lot of talking, are more likely to change their minds, and may not have the best listening skills.

Expressives

These individuals are high in assertiveness and high in emotional responsiveness, making them the “most flamboyant” of the styles (Bolton & Bolton, 2009, p. 49). They want to be where the action is; they are playful, high-contact, impulsive, story-telling individuals who might speak before thinking. Their emotions are key players in their decision-making, and can find time-management challenging.

Versatility, flexibility, and style identification

Merrill and Reid (1981) discuss versatility and the ability to be situationally adaptable. Like versatility, the idea of style flex (Bolton & Bolton, 2009) is about adjusting your behaviour to make the interaction more comfortable for the other person. This third dimension of the model (J. Bolton, personal communication, May 22, 2020), to be considered along with assertiveness and emotional responsiveness, is highly important for understanding how People Styles operate in practice. Bolton and Bolton (2009) provide specific recommendations for style flex based on your style, but generally the best strategy is to operate under the “Golden rule”: treat the person the way you would want to be treated, and ask yourself, “Would I be willing to be a recipient of my action? If not, don’t do it” (p. 132). In line with this, “people who are more highly flexible/versatile tend to be more successful in their roles” (J. Bolton, personal communication, May 22, 2020).

In identifying your style or another person’s, it is important to separate observable behaviours from feelings and beliefs—or separate observing from inferring. For your own style identification, it is important to remember that the assessment itself is self-reported and thus subject to change based on your own feelings and the context you’re reflecting on. Ridge Training reports that, in workshops on People Styles, self-assessments of People Style are wrong about 50% of the time (J. Bolton, personal communication, May 22, 2020). It is hard for us to accurately see our own behaviours.

Part of the reflective process is understanding that we present ourselves to different groups of people in different ways—and acknowledging that that is the beauty of reflecting on our communication. Our flexibility is something to pay attention to, but our go-to style—the one in which we find the most comfort—is the overarching style we can use to understand and utilize the model for intentionally implementing communication flexibility.

To identify another person’s style, pay attention to their body language, note their degree of assertiveness and responsiveness, and perhaps let them take the “lead” in your interactions in order to see how they behave. Once you have identified whether you and your conversation partner are analytical, amiable, driver,
or expressive individuals, the next step is using this information in a meaningful way in your communication with others.

**TEACHING PRACTICE CONTEXT**

Self-knowledge comes when you observe yourself… with all the people around you, it comes when you observe the manner of another, his gestures, the way he wears his clothes, the way he talks, his contempt or flattery and your response; it comes when you watch everything in you and about you and you see yourself as you see your face in the mirror.

—Krishnamurti (1964, p. 40)

I have used the People Styles model (Bolton & Bolton, 2009) for over five years, with individuals from diverse ethnic backgrounds, nations of origin, sexual orientations, and age groups. I have employed it in a larger course on interpersonal effectiveness for applied psychology Master’s students specializing in evaluation research, and I recently adapted the training to a short stand-alone workshop with Master’s- and PhD-level evaluation and measurement students.

I engage primarily in a facilitator role, promoting a collaborative learning environment. According to Peters and Armstrong (1998), in collaborative learning, “the relationship is defined in terms of learner to learner, learner to group, and group to learner” and “dialogue is the principle mode of discourse” (p. 80). There is no one right way to communicate. It is a give and take between individuals that depends on the situation’s context, including its cultural components. Setting up the learning environment as a lateral space for open communication sets the stage for more authentic reflection on how we continue together. The model itself is meant to be non-judgmental, with no style better than the other. This helps facilitate personal and cultural expectations around communication.

Using the People Styles model provides students with a model of communication based on observable behaviours so that they can reflect on how their own and others’ assertive and responsive behaviours interact in communication situations and consider how to be versatile, “flex” (Bolton & Bolton, 2009, p. 91), and adapt accordingly in their professional practice. Students read the book or are provided with a brief overview of the model and then take the accompanying self-assessment. Participants then engage in reflective practice with their peers to examine how their communication style interacts with that of clients, colleagues, and even friends and family members. This process provides students space to examine their own communication behaviours, identify the styles of people with whom they regularly interact, and see when their own and others’ styles cause conflict and discomfort in communication situations. It is beneficial for students to bring the assessment home and select appropriate people in their lives to complete the assessment on them. I usually send them home with three additional assessments for others to complete, and often they come back with multiple People Style categorizations to reflect on—and that’s okay!
REFLECTIONS ON THE USE OF THE PEOPLE STYLES MODEL

“All models are wrong, but some are useful.”

—George Box

The People Styles model, according to Bolton and Bolton (2009), enhances our ability to foster productive, thoughtful relationships, and to increase our own self-awareness and self-management. Through my own reflections on five years of watching students use this model to grapple with their communication abilities and behaviours, I point to four key benefits of providing time and space for reflection and intentional focus on interpersonal skills. It is important to note that “names or labels never do justice to the reality they identify” (Bolton & Bolton, 2009, p. 39), and that model is meant to help organize our thinking in a useful way. The model provides the following:

• language and structure, with observable behaviours, through which to gauge the communication styles of oneself and others;
• awareness of oneself and one’s typical interaction behaviours;
• awareness of others, including clients, colleagues, and personal relationships; and
• a basis for critical reflection in- and on-action (Schön, 1983; Smith et al., 2015; Smith & Skolits, in press).

Having the language and structure of the People Styles model in the classroom gives us a common lexicon with which to explore our behaviours. Students have noted that the categorical labels of the styles, the constructs of assertiveness and responsiveness, and the identification of observable behaviours to accompany that language, help them ground theory in practice. The model’s simplicity allows them to relate their previous experiences with evaluation clients and their own personal relationships to the use of the model in practice. An amiable student in my recent training, for example, reflected on the need to be more assertive and take more charge and ownership of the evaluation with a client who tends to take a more “driving” role. An overly expressive student reflected on the need to be more responsive to client needs, letting them voice their perspectives more often during stakeholder meetings so as to finish with a stronger final report. Having this language and structure provides students the opportunity to engage in critical dialogue around their areas of growth and have honest conversations about how they interact with their clients and colleagues.

Awareness of oneself and others are two additional benefits of the model. Having taught this model in both undergraduate- and graduate-level courses, one of my most salient reflections is that it is clear that many students have never taken the time to think about how they come across to others, or how their ability to assert themselves and respond emotionally to people affects the communication environment. Use of the People Styles model is a self-monitoring system. Students reflect and ask questions such as these: Am I coming across too strong with this
person? Should I be more assertive in this situation? Who am I in the room with, and how will thinking through that potentially change my interactions? Why do I come across as an amiable to my colleagues, but a driver to my significant other? The key to good communication is awareness.

Finally, the model provides a basis for critical reflection in- and on- action (Schön, 1983; Smith et al., 2015; Smith & Skolits, in press). Reflecting on the model can help us make in-the-moment adjustments to our own communication to advance the interaction (reflection in-action) and can also help us take a step back from daily operations to analyze our situation more deeply and act in light of this analysis (reflection on-action). In the classroom, students are hyperaware in the moment, noticing how their behaviours influence others in real time during discussion of the model and the content itself—reflection in-action. They also take the concepts learned through the model and apply them to thinking about past and future communication situations—reflection on-action.

By using the model, students can ask questions such as “How does client X typically interact when I engage with them?” and adjust their behaviours accordingly, so that when we meet the next time we are flexing our styles for improved interaction and productivity. As noted earlier, reflective practice and interpersonal competence are related concepts, and using the People Styles model can increase both capabilities, if students honestly and authentically engage in the process.

CONCLUSION

In thinking of evaluation as a “caring” practice, Hamington (2018) noted that “[p]rofessional competence is not static as in the achievement of a degree but dynamic and in constant need of fine tuning to maintain competency” (p. 41). The pairing of the People Styles model with authentic and open reflection on how we interact with our environment and the people in it (Smith et al., 2015; Smith & Skolits, in press) helps us understand that being an evaluator means a constant assessment and reassessment of who we are and what we bring to the table as professionals in practice.

This critical reflection arms future professionals with the ability to reflect on and hone key interpersonal skills. The People Styles model is a reflective tool that can help evaluators unlock the doors to thinking about their own and others’ interpersonal behaviors in evaluation contexts, and pivot accordingly in practice. I plan to continue using this model as a reflective experience to help create stronger and more thoughtful, flexible, and versatile evaluation professionals. Using it in your own classroom will help you shine a light on an area that is often under-emphasized in evaluation curriculum, though essential to practice—the interaction between the self and other(s) in context.

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Fieldwork Experience as Cultural Immersion: Two International Students and Their Professor Reflect on a Recent Evaluation Practicum

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Onyinyechukwu Onwuka du Bruyn  
*University of North Carolina, Greensboro*

Jill Anne Chouinard  
*University of Victoria*

**Abstract:** In this practice note, two international students of evaluation reflect on the cultural challenges they experienced learning to apply Western-based methodologies in unfamiliar cultural contexts. Using a process of reflection, the students identify four interrelated challenges: understanding the culture and program setting, the need for interpersonal and communication skills, learning the language of evaluation, and telling the story. The paper concludes with reflections from the course professor, who highlights the challenges of teaching evaluation, an intensely cultural practice with deep roots in Western theoretical traditions, to students who do not come from the United States. Through reflective practice, the two students were able to overcome many of their initial challenges.

**Keywords:** cultural immersion, evaluation practicum, international students, reflective journal, teaching evaluation

**Résumé:** Dans la présente note sur la pratique, deux étudiantes étrangères en évaluation réfléchissent aux défis culturels rencontrés en cours d’apprentissage en ce qui concerne l’application de méthodologies occidentales dans des contextes culturels non familiers. À l’aide d’un processus de réflexion, les étudiantes cernent quatre défis interdépendants soit : la connaissance de la culture et du cadre du programme; l’importance de compétences interpersonnelles et de communication; l’apprentissage de la langue de l’évaluation et la narration du récit. L’article se termine par les réflexions de la professeure du cours, qui met en évidence les défis liés à l’enseignement de l’évaluation, une pratique intensément culturelle et profondément enracinée dans les traditions théoriques occidentales, à des étudiants qui ne viennent pas des États-Unis. Par une pratique réflexive, les deux étudiantes ont pu surmonter bon nombre de leurs défis initiaux.

**Corresponding author:** Grettel Mariana Arias Orozco, Department of Educational Research Methodology, School of Education, University of North Carolina, Greensboro, 1300 Spring Garden Street, Greensboro, NC, 27412; gmariaso@uncg.edu.
The challenges of helping students transition from classroom-based learning to an applied field setting have been well documented (e.g., Buitrago et al., 2015; Greddler & Johnson, 2001; Hurley et al., 2005; Perry, 2008), underscoring the fact that evaluation is more than a technical craft and requires more than the application of methodological expertise (Chouinard et al., 2017). While evaluation contexts are complex, multifaceted, and highly interactive spaces that encompass a blend of social, historical, political, and cultural dimensions (Mathison, 2005), learning evaluation can itself be a tumultuous, uncertain, and daunting experience for many students (Chouinard et al., 2017; Hurley et al., 2005), not least for those from other countries.

In this practice note, two international students (one from West Africa and the other from Latin America) reflect on their first evaluation experiences gained through an evaluation practicum course, with a focus on the challenges and opportunities they encountered throughout. The course professor, responsible for selecting projects and providing guidance to students during the course of the semester, concludes with further reflections on teaching an applied evaluation practicum to international students. In the first part of this paper, we describe the evaluation course and the program context. The second part focuses on four identified challenges: immersion in understanding the culture and program context, the need for interpersonal and communication skills, learning the language of evaluation, and telling the story. The course professor concludes with reflections about the students’ perspectives and the challenges of teaching evaluation to international students.

A DESCRIPTION OF THE UNIVERSITY COURSE AND THE PROGRAM CONTEXT

The graduate degree in program evaluation begins with an evaluation theory course in which students first learn about the basic concepts, theories, and models of evaluation. The goal of the course is to enable students to understand the major theories and approaches used in evaluation, develop an evaluation plan (based on a case study), and identify the different components of an evaluation. The process of determining which approach to use in a specific context is highlighted throughout, as are the different research paradigms and contexts of practice. This course is followed by a practicum course, where students pair off into small teams to collaboratively plan and conduct a small-scale evaluation, which they complete during the semester (January to April). This course provides students with practical experience conducting and managing a small-scale evaluation, designing a context-appropriate evaluation, applying basic data-collection tools, analyzing qualitative and/or quantitative data, and writing a final report. During the semester we focus on here, six students were enrolled in the course, with three evaluation teams working on separate program evaluations. Weekly in-class
discussions facilitated by the professor encouraged peer learning, while scheduled one-on-one sessions ensured that students were on track. As part of the course, we were required to keep reflective journals with weekly entries throughout the semester; these provided us the opportunity to record our experiences conducting the evaluation, to reflect on our experiences as novice evaluators, and to document our insights, challenges and expectations. We used these journal entries for further discussion and to assist with our thematic analysis.

For our evaluation, we selected a principal preparation program situated within the university, a program that involves a partnership with 11 rural school districts that struggle to find and keep effective principals for high-needs schools. The goal of the partnership is to develop strong, sustainable leadership pipelines within those 11 districts, and prepare and license 20 new principals for high-needs, rural schools. Year one of the program involves rigorous coursework with a site-based practicum in a high-needs, rural school, followed by a full-time, 10-month internship in year two with a principal as mentor at a high-needs school. The evaluation we designed was formative and based on qualitative data collection, with a focus on understanding program coherence through the diverse learning experiences of program participants. We worked closely with the project director throughout our evaluation and were fortunate that she had the time to devote to our understanding of the program context.

THE STUDENTS’ PERSPECTIVES

Analysis of our respective journals and further collaborative reflection led us to identify four interconnected challenges that we believe capture our experiences as international students learning about evaluation within the cultural context of the United States. The four challenges are understanding the culture and program setting, the need for interpersonal and communication skills, learning the language of evaluation, and telling the story.

Understanding the culture and program context

When we began this evaluation, we had only recently arrived in the United States and had only a limited understanding of evaluation. One of the first things we were taught about evaluation was the importance of understanding context. As international students new to the United States and to the field of evaluation, we found this a significant challenge, as it meant learning not only about the program and its local context but also about the US education system, a system very different from the ones in our home countries. Specifically, we could not understand why there would be an issue retaining rural principals, the very objective of the program we were tasked to evaluate. In Costa Rica, the salary of teachers and principals is based on their formal education and their previous classroom experience. When teachers and principals go to rural parts of the country, they receive an incentive rather than a decrease in their salaries. Similarly, in Nigeria, the salary of principals and teachers is based on their qualifications and on the
tet of government (local, state, or federal) that has employed them. Principals and teachers employed in schools managed by the federal government earn more money than their state or local colleagues.

To learn more about the specific context of the program, we had to devote a significant amount of time reading and learning about high-needs rural schools in the United States and about the challenges of retaining school personnel. We had a difficult time finding the information we needed about the US education system, specifically information about salaries for teachers and principals in rural communities and about other relevant policies. This research added another layer of complexity to the task of learning how to do evaluation in a short, one-semester time period. Program documentation was our main source of information, but we also consulted peer-reviewed articles and had numerous discussions with colleagues in our department who shared knowledge about the local education system.

Given that we felt like “outsiders” to the program and to the culture of the community, we reflected regularly on what we considered our potential biases, checked our assumptions with stakeholders and participants, and practiced active listening. Throughout, we were keenly aware of our positionality and practiced humility by knowing we were learning about the program, the culture, and program evaluation at the same time; we were also respectful of cultural habits and customs (e.g., being punctual, addressing our stakeholders by their names/titles, pronouncing their names correctly, and respecting their schedules). With more time, we believe we would have been able to gain more insight about the program and program context, which we believe would have made our evaluation stronger.

**The need for interpersonal and communication skills**

Strong interpersonal and communication skills are extremely important when working with clients to help establish strong partnerships and facilitate ongoing dialogue. We consider this our second challenge. None of the courses we had taken before the applied evaluation class had addressed these topics in any detail. As a result, we felt we needed to learn more about teamwork, conflict resolution and negotiation, and problem solving and decision making prior to this applied evaluation course. In our discussion of this challenge we realized that our concern was with our use of language and with trying to figure out how best to communicate with our client and with program participants. We spent a significant amount of time discussing how to best reach our client (phone call, email, or face-to-face), and how to write and compose all communications. In addition to being from different countries and different backgrounds, one of us is not a native English speaker. Communication and use of language were thus an ongoing concern, especially as we wanted to project professionalism in our practice as novice evaluators. While we believe that, overall, we did a good job communicating with our client, we cannot overemphasize the need for formal training in interpersonal and communication skills, especially for novice evaluators. From the perspective
of international students, we believe these skills are even more important, as we have not yet learned the rules and norms of dialogue and communication in the United States.

**Learning the language of evaluation**

Language was a critical element of our applied evaluation experience. As mentioned previously, for one of the international evaluators, English is her second language. As a result, besides the necessity for cultural competence, linguistic (literal and figurative language) and pragmatic competences were essential. To communicate effectively, we tried to engage in clear and transparent dialogue, avoiding the use of slang and idioms and asking for explanations with acronyms or uncommon phrases when necessary. Given the importance of language, we were very careful with how we constructed emails to stakeholders and participants, working to ensure clarity; this was especially important given that we come from different cultures and that a word in our culture could mean something totally different in an American context. In Costa Rica, for example, the terms assessment and evaluation are encompassed within one umbrella term, “evaluación.”

We also realized that, by learning evaluation in the United States, we were at the same time being immersed in the Western canon, in a very specific way of knowing, and with very specific views, beliefs, values, methods, and language. Learning about evaluation in the southeastern United States also meant learning about racial diversity and discrimination, two discourses that are not as prevalent in our home countries, given the homogeneity of people in Costa Rica and Nigeria. Where we come from, discussions are more commonly focused on financial disparities, unemployment, crime, violence, environmental problems, and the government’s lack of capacity. These ideological discourses emphasize specific aspects, topics, or problems as they are conceptualized within a specific society, and these concepts shaped and influenced what we learned. This was a crucial acknowledgement for us, as language shapes our understanding of the methods and theories we use, reflects a point of view, and shapes how we think and what we think about. Consequently, we remained aware of what our language revealed and what it omitted, whom it embraced—all very important as we sought to represent a diversity of stakeholder perspectives throughout our evaluation.

From a broader perspective, language was particularly important for us because we understand language as a performative act (Austin, 1975; Searle, 1969). Through language, we not only express actions and realities but also create them. From this point of view, language is closely related to culture and identity since language shapes our realities. In our evaluation, we were interested in how our spoken and written utterances could affect the circumstances in which the evaluation was taking place, how the language we used could alter participants’ reality, and in what ways we were interpreting and communicating this in our final report. We understand the power of our language and words, especially as we are “outsiders” in a system of thought and practice that is so firmly entrenched in the American setting.
**Telling the story**

Our final challenge focuses on the challenges we experienced reporting our evaluation findings and “telling the program’s story,” as we were instructed to do by our professor. As international students, we were confused about how to tell our program’s story and to write a convincing narrative that would capture everything we had learned through our evaluation. Although we consulted multiple sources and studied multiple examples of final reports, they all used language differently and contained different sections and subsections and different ways of visualizing data. As a result, we constantly questioned our telling of the story and kept looking for a better way to narrate our findings and to include all the different voices and perspectives of our participants. After multiple iterations, we decided to use a three-step approach to telling the story: (1) exploring the data with the evaluation framework in mind, (2) turning the findings from this exploration into a narrative or story, and (3) communicating this narrative to our stakeholders in the form of an evaluation report. Constant communication and engagement with the client were essential in our learning process.

Regardless of the context, we recognized that acknowledging our biases, values, and positionality plays an important role in how we tell the story. Researchers and evaluators are part of a privileged group with the power to shape meaning and construct knowledge. Looked at in a certain way, the discipline of evaluation is nonfiction story making, where our stories are considered “facts.” Given this, we believe that evaluators must be attentive to misinterpretation or misrepresentation, especially since this may have very real implications in people’s lives. The fact that we come from different countries and different cultures merely adds to the importance of reflecting upon our subjectivity (Pon, 2009), a reflection we now realize helped us navigate the complexity of this cultural context.

To conclude, we consider openness, flexibility, and humility to be key components of our profession, and essential in enabling us as international students to address the many challenges we experienced. Evaluation work requires us to reflect on and be aware of our cultural identity in order to ground our positionality, assumptions, and biases. Our recommendation to other international students is to act consciously, to keep learning, reflecting on, and thinking about culture (yours and others), and to keep an open appreciation and respect for divergent worldviews. Reflective practice can help us navigate complex contexts. Finally, we recommend that professors who teach evaluation to international students be aware of cultural differences, language barriers, and the immersion process, and that they look beyond the application of their frameworks and perspectives to understand that there is no one unique approach for doing evaluation, but many, depending upon the program and its cultural context.

**THE COURSE PROFESSOR Responds**

The two international students identify four challenges that they experienced conducting their first field evaluation. They note specific challenges: understanding
the cultural context of the program, the need for solid interpersonal and com-
munication skills, the need for understanding the language of evaluation, and
challenges with interpreting data and presenting the final results. Their discussion
of “telling the program’s story” illustrates many of these challenges, as it involves
language, interpretation, and positionality, all key concerns in any evaluation.
Their conclusion highlights the need for reflective practice, an especially im-
portant “reflection in action” (Schon, 1983) perspective for novice evaluators
who are transitioning from the safety of the classroom to the field of practice.
While these four challenges can be understood from the perspective of interna-
tional students—that is, from a cultural perspective and as issues of language and
translation—they are also shared by novice evaluators who come from the United
States. In prior research (see Chouinard et al., 2017), we noted that students who
were novice evaluators struggled with understanding the socio-political dynamics
of program contexts and the need for reflective and adaptive practice throughout
the evaluation process. Interestingly, the challenges of practice led these students
to seek the safety of evaluation theory, which unfortunately did not provide the
comfort (or answers) they sought. The international students, as we learn from
their narrative, did not look to evaluation theory for answers to their field chal-
 lenges. Instead, they sought a more thorough understanding of the program’s
context. Their four challenges represent what many evaluators struggle with
throughout the evaluation process. Can we ever say we understand a program’s
context? How do we position ourselves in reference to the community and to the
program? Are we insiders or outsiders? How do we ensure and maintain excel-
lent communication with clients and stakeholders? How can we practice cultural
humility? Do our interpretations make sense? The students’ challenges, their
questions, and their conclusions about reflective practice all point to examples of
good evaluation practice.

Evaluation is an intensely cultural practice founded on principles of Western
modernity, rationality, and progress (Bhola, 2003; L. T. Smith, 1999). As a teacher
in this course, especially as a teacher of international students, I was keenly aware
of my positionality and academic privilege, my Western perspectives and biases,
my colonizing act of promulgating frameworks, theories, and concepts that are
fundamentally rooted in Western epistemology, ideology, and privilege, and the
challenges these students would likely experience adapting Western-based meth-
odologies to their local socio-cultural, political, economic, and ecological contexts once they return home. Evaluation, as we understand and practice it, is very much a Western concept (Bhola, 2003; Hopson, 2003), a concept the West has been exporting to the Global South for many years. Exporting our Western-based approaches and methodolo-
gies is merely another form of colonial rule, albeit in the form of evaluation and
knowledge production. I thought about Carden and Alkin’s (2012) notions of adopted and adapted methodologies, as it highlights the shift to approaches that are tailored to local socio-cultural, political, economic, and ecological contexts. At
the very least, it signifies a move toward epistemologies that are local and cultur-
ally relevant to the people and programs they are intended to represent. That was
my goal (and also my challenge) as I stood in front of the room in early January, acutely aware that these students would have only four months in which to conduct their first evaluation, as many of them continued to struggle with building logic models, analyzing qualitative data, writing a survey, and so on. Teaching is a daunting task, and teaching evaluation as a socio-cultural and Western political construct remains even more daunting. Would these international students be able to adapt our Western-based methodologies once they got home? As Nick Smith (2002) asks, if we, as teachers of evaluation, are unfamiliar with the home cultures of our students, how do we prepare them to translate Western-based evaluation theories into their own local contexts? In the end, I believe that it was through their queries, inquisitiveness, and uncertainties, and through their acts of bravery, that these two international students were able to overcome their challenges and become reflective practitioners.

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**AUTHOR INFORMATION**

Grettel Mariana Arias Orozco is affiliated with both the Universidad de Costa Rica (UCR) and the University of North Carolina Greensboro (UNCG), where she is an international student currently pursuing her Ph.D. in educational research methodology (ERM), with a concentration on program evaluation. Throughout her MS/Ph.D. education, her research focus has centred on researching international students’ experiences studying evaluation in the United States, evaluating STEM projects and programs serving historically marginalized populations and, most recently, reflections about the use of culturally relevant methodologies when doing evaluations with Latino populations and by Latino evaluators.

Onyinyechukwu Onwuka du Bruyn has ten years of experience as a research methodologist and statistician. She is currently a Ph.D. student in the Department of Educational Research Methodology (ERM) at the University of North Carolina, Greensboro (UNCG), studying program evaluation. She is passionate about gender equality and surfacing women’s voices in research. Her research interests center on employing a culturally responsive approach to evaluation and utilizing the social justice lens in conducting evaluation in marginalized and under-represented communities and populations. She has managed several public health and edutainment research projects in Nigeria funded by UNICEF, USAID, and the World Bank.

Jill Anne Chouinard is an associate professor in the School of Public Administration at the University of Victoria. Much of her evaluation work has been conducted in culturally and socially diverse community settings, where she has extensive experience leading evaluations at the community level in the areas of education, social services, public health, and organizational learning and change. She positions evaluation as a catalyst for learning, collaboration, equity, social justice, and community change.

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Collaborative Evaluation Designs as an Authentic Course Assessment

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Abstract: Strategies for optimizing evaluator education involve ongoing discussions within the field of evaluation. There remains unrealized potential for authentic assessments to support and measure learning that demonstrates the integration of evaluation theory with practice. In this practice note, we advance collaborative evaluation designs as a useful authentic assessment for generating the type of applied learning evidence required within an evaluation-focused graduate course. First, we provide a brief review of educational literature, highlighting the value of authentic assessments and a description of the contexts where we effectively applied the collaborative evaluation design. Next, we offer details of the four instructional processes involved in the authentic assessment: planning, development, feedback, and measurement. Finally, we advance lessons learned from our instructional experiences and the learner benefits of the collaborative evaluation design as an authentic assessment.

Keywords: assessment, post-secondary, teaching evaluation

Résumé : L’amélioration continue de la formation en évaluation dépend, en partie d’échanges parmi ceux et celles qui en sont chargés. Il existe toujours un potentiel inexploité d’évaluation authentique visant à appuyer et à mesurer l’apprentissage qui démontre l’intégration de la théorie et la pratique. Dans la présente note sur la pratique, nous présentons des modèles d’évaluation collaborative comme outils d’évaluation authentique et utile pour arriver au type de preuve d’apprentissage requis dans un cours de cycle supérieur en évaluation. Premièrement, nous faisons un bref examen de la littérature pédagogique, en soulignant la valeur des évaluations authentiques et une description des contextes dans lesquels nous avons appliqué efficacement le modèle d’évaluation collaborative. Ensuite, nous décrivons de façon plus détaillée les quatre processus d’enseignement qui font partie d’une évaluation authentique : la planification, l’élaboration, la rétroaction et la mesure. Finalement, nous faisons part des leçons apprises de notre expérience d’enseignement et des avantages, pour les apprenantes et apprenants, du modèle d’évaluation collaborative comme évaluation authentique.

Mots clés : évaluation, postsecondaire, enseignement de l’évaluation

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Strategies for optimizing evaluator education involve ongoing discussions within the field of evaluation (e.g., Chouinard et al., 2017; Gullickson et al., 2019; Poth et al., 2020; Trevisan, 2004). Post-secondary contexts are well known for their use of assessment strategies such as tests, quizzes, and essays to measure learning at the end of a course. While these strategies may be well suited for measuring learners’ acquired knowledge of specific evaluation concepts, they may be insufficient for generating reliable and valid evidence of applications of complex evaluation skills in practice. The need for this type of learning experience is well established in the field; Gredler and Johnson (2001), for example, reflected on the value of directed evaluation experience as an adjunct to course-based work, citing the knowledge broadened by encountering real-world issues and the validation of emerging professional identities. Indeed, learners and instructors of evaluation-focused courses may well be better served by assessments that measure learning outcomes focused on the practical application of knowledge and skills (Knight, 2012). Yet there remains unrealized potential for authentic assessments within evaluation-focused coursework, evaluations that support and measure learning that demonstrates the integration of evaluation theory with practice.

As evaluation educators who have extensive training and experiences as instructors within K-12 and post-secondary education systems and who are well-established assessment scholars, we are well positioned for advancing the use of authentic assessments. We draw from our knowledge and research products highlighting the benefits of authentic assessment for both learners and instructors to bring the usefulness of authentic assessment into the dialogue of evaluator education. As one of the challenges of doing so is using field-specific terminology, and because prominent evaluators remind us that language matters (e.g. Hopson, 2000; Patton, 2000), we pause for a moment to clarify a key term.

While the word authentic is often used within educational literature to describe tasks, rubrics, and assessments that focus on real-world practice (Gulikers et al., 2008), we use the term authentic assessments to distinguish the generation of learning evidence within the integration of evaluation theory with practice. This usage aligns with that of Wiggins (1998) as a way to identify assessments when the learner is asked to complete a task that is highly similar to what they would encounter in their future professional practice. Authentic assessments within evaluator education place an emphasis on the learning processes that occur within real-world contexts and direct attention to the need for, and ways of, integrating feedback and reflection to extend learning. We advance authentic assessment as a term to be leveraged by evaluator educators to describe the processes involved in supporting and measuring desirable applied learning evidence that is specific to evaluation.

In this practice note, we advance collaborative evaluation designs as a useful authentic assessment for generating the type of applied learning evidence required within an evaluation-focused graduate course. First, we provide a brief review of educational literature, highlighting the value of authentic assessments and a description of the contexts where we effectively applied the collaborative evaluation
design. Next, we offer details of the four instructional processes that involved the authentic assessment: planning, development, feedback, and measurement. Finally, we advance lessons learned from our instructional experiences and the learner benefits of the collaborative evaluation design as an authentic assessment.

**THE USEFULNESS OF AUTHENTIC ASSESSMENTS**

Within the landscape of educational assessments, authentic assessments are those in which learners are required to demonstrate combinations of knowledge, skills, and disposition in a real-life context (Maclellan & Soden, 2004; Mueller, 2005; Wiggins, 1993). The value of authentic assessments is premised on research about situated learning (Stein, 1998) and social constructivist theory (Kalina & Powell, 2009). Authentic assessments contribute to thinking about assessment as being integrated throughout the learning process; as described by Maclellan and Soden (2004), “within these perspectives, assessment is not only about judging how much people know but judging how, when and whether they use what they know” (p. 316). The benefits of this for evaluator education include directing learners’ attention to what is valued—not just accumulated knowledge but also its application in real-world contexts. We frame seven key characteristics for authentic assessment:

1. involving learners in setting goals and assessment criteria;
2. performing a task, which includes locating resources to develop ideas and creating an artifact or product over time and in a real-world setting/professional context;
3. engaging in continuous dialogue with others (e.g., peers, instructors, community partners) for the purpose of ongoing formative assessment;
4. using higher-level thinking and/or problem-solving skills;
5. integrating prior knowledge with inputs from classroom instruction and resources to create a product
6. demonstrating knowledge, skills, and attitudes related to a particular concept; and
7. advancing metacognitive, collaborative, and interpersonal skills as well as intellectual products (Airasian, 2001; Linn & Miller, 2005; Wiggins, 1993).

We are not alone in our application of authentic assessments; indeed, their usefulness is well established in vocational training and competency-based programs where learners integrate theory and practice and move toward a mastery of skills needed in their future professional roles (Gulikers et al., 2008). Authentic assessments have been shown to positively affect learners’ knowledge and motivation (e.g., Herrington & Herrington, 1998; Raymond et al., 2013). Motivation may increase when assessments align with learners’ perceptions for enhancing their knowledge and/or engaging in practical processes (Fook & Sidhu, 2010; Gulikers...
et al., 2008). Surely learners and instructors would welcome the motivational and professional learning benefits of authentic assessments in evaluation-specific coursework.

OUR TEACHING CONTEXTS FOR EVALUATION-FOCUSED AUTHENTIC ASSESSMENTS

The collaborative evaluation design as an authentic assessment has become a key feature of our instructional approaches to teaching evaluation-focused courses at two Canadian institutions over the past decade. Its usefulness goes beyond its support and measurement of specific Canadian evaluator practice competencies (CES, 2018) to serve purposes similar to what is seen in community-service learning (Jacoby, 1996) and some internships (Divine et al., 2008), where service is rendered without payment because the learner completes an assignment for credit. Our courses are offered by faculties of education yet draw diverse learners from a range of disciplines. They are primarily delivered face-to-face in weekly three-hour classes and supported by online platforms across a 12-week term. Together we bring to these courses more than three decades of experience as practising evaluators with the Credentialed Evaluator (CE) designation and sustained programs of research in evaluation and evaluation education.

OUR INSTRUCTIONAL PROCESSES

Applying the collaborative evaluation design as an authentic assessment involves four instructional processes, represented in Figure 1: evaluation course and assessment planning, evaluation-focused instruction and learner development, learning supports and embedded feedback, and evaluation-specific learning and measurement.

Evaluation course and assessment planning

Planning a program evaluation course begins in the months, if not years, leading up to the course offering. As career educators, our pedagogical practices stem from core beliefs related to transformative learning theory (Mezirow, 1997) and constructivism (Duffy & Jonassen, 1992). These theories inform the value we place on experience and reflection, both individually and with others, as essential for propelling learning.

Our planning is also influenced by the standards put forward by the Joint Committee (Yarbrough et al., 2011) and Canadian competencies (CES, 2018). These frameworks guide our expectations for learners and are interwoven in our assessments. Learners may develop an understanding of the standards of feasibility and utility while simultaneously expanding their competencies related to interpersonal and technical practice. Each learner experience is different, and neither the standards nor the competencies are meant to be used prescriptively; instead, they provide guiding ideas that we introduce and put into practice. Students

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monitor their thinking about these standards and competencies through self-assessment and through oral and written reflections during the course.

Initial planning for our course also involved new pragmatic procedures. Each instructor, for example, obtained ethical approval for gathering learner fieldwork and established a consent process to discuss fieldwork in class. This approval required the completion of standardized forms and resulted in documentation such as the “Community Partner Information Letter” and “A Guideline for Recruiting A Community Partner.”

**Evaluation-focused instruction and learner development**

Instruction is varied and differentiated by learner needs and instructor strengths. Common to our courses is an understanding that, to effectively participate in collaborative evaluation design, learners require details about the expectations of
the authentic assessment in advance. Details are offered in multiple forms (e.g., syllabus, slides, online, and orally) and reviewed for clarity. A sample of how this authentic assessment appears on one of the syllabi is provided in Table 1.

The collaborative evaluation design is submitted for grading at the end of course and thus contributes a high percentage of the overall grade calculation. The intention is to co-mingle theoretical understandings developed throughout the course with the practical experience of interacting with a community partner. A plethora of educational materials are offered to help learners translate theoretical learning to applied learning throughout the term. For example, Alkin and Vo’s (2017) text is used as a pre-class reading to introduce core concepts and supplemented with additional required and optional readings each week; learners are expected to read as needed to be responsive to areas where they need development. Figure 2 shows a course timeline with different roles and a progression of activities. The sequence and interactions in this timeline are an idealized version; individual differences across different groups of learners are to be expected within a more generalized progression toward the end product.

**Learning supports and embedded feedback**

Students work independently or with a small group to identify and then work with a community partner for the course duration. Finding and securing the timely commitment of a community partner can be a daunting task. To facilitate this process, we offer supportive documentation and mitigate stress by offering the opportunity for students to work with known partners and in small groups. While locating a community partner is an essential task required in a short period of time, after years of offering these courses we have community partners that request to participate in this process, and we offer these contacts to students.

Together, the learner and partner develop evaluation priorities and questions. Regular contact is maintained in a way that suits the needs of the partner (e.g., email, phone, meetings). In an iterative process, the learner works with information gathered from their partner and from course resources (including instructor and peers) to shape the design. Exchanges between learner and community partner happen outside of class time without direct supervision from the instructor. Class time is allocated to discuss the designs in progress, and there is regular online activity.

Weekly classes typically include peer and instructor review of key elements, followed by questions and reflections related to designs and by time to imagine and act out “what-if” scenarios. Similar to what is described by Chouinard and colleagues (2017), learners reflect on the messiness of the experience, the back and forth, the communication, or other challenges. We emphasize that learner development takes place as knowledge is transformed into action through guided reflection and feedback. Feedback occurs in many ways and from multiple sources, informally from the partner, during class working sessions, and also through instructor conversations throughout the term online and in person.
Table 1. Overview of syllabus details about the collaborative evaluation design

<table>
<thead>
<tr>
<th>Assignment and purpose</th>
<th>Description</th>
<th>Weight</th>
<th>Due date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Written program evaluation design</td>
<td>Each course participant will engage in partnering with an evaluation client to create an effective written evaluation design (approx. 30 pages + references) demonstrating an examination of evaluation contexts (organization, political, community, and social), understandings of program theory and impacted stakeholders including visual representations, specification of evaluation guiding theory/approach and purpose that attends to the client needs, plans for data collection &amp; analysis procedures aligned with key and enabling evaluation questions, proposed reporting strategies to promote use, and key client reading references including a rationale for choice and (where possible) links to the resources.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>To convey in writing, your evaluation design for your client</td>
<td></td>
<td>Required</td>
<td>Submit ethics certificate</td>
</tr>
<tr>
<td>You may seek your own client or speak with instructor for assistance.</td>
<td></td>
<td>Required</td>
<td>Submit signed consent letter</td>
</tr>
<tr>
<td>Find a community client. Introduce the assignment using the information letter and consent form</td>
<td></td>
<td>Required</td>
<td>Keep field notes from your experiences</td>
</tr>
<tr>
<td>Interact with your client throughout the course to design the evaluation plan</td>
<td></td>
<td>Required</td>
<td>Submit online with a layout of the full plan and some components completed in draft form</td>
</tr>
<tr>
<td>Interim draft of assignment with some components (see above) for formative review &amp; feedback from instructor</td>
<td></td>
<td>Recommended</td>
<td>Bring to class</td>
</tr>
<tr>
<td>Prepare full draft for formative review &amp; feedback from peers, instructor, and client</td>
<td></td>
<td>Required</td>
<td>Bring paper copy of plan and supporting materials from field experience for gallery walk</td>
</tr>
<tr>
<td>Submit written evaluation plan for feedback from instructor and grading</td>
<td></td>
<td>Required 35%</td>
<td>Submit online by midnight</td>
</tr>
<tr>
<td>Attend class evaluation event with client (final class) to organize a time to debrief design with your client</td>
<td></td>
<td>Required</td>
<td>Bring paper copy of plan and supporting materials from field experience for gallery walk</td>
</tr>
</tbody>
</table>
Figure 2. Course timeline with roles and activities
Evaluation-specific learning and measurement

Authentic assessment prioritizes evidence of learning developed over time and in diverse contexts to support sound decisions about development (Darling-Hammond & Snyder, 2000). From the start, we provide information about assessment and tools for individualized learning. We devised a self-assessment based on the Canadian competencies (CES, 2018) to encourage ownership of learning. Interacting with and receiving feedback from a community partner reinforces the real-world application of evaluation-specific knowledge, skills, and dispositions. Concurrently, opportunities to offer and receive feedback are embedded in the course and also emerge online. Feedback is a time-consuming but critical part of this course; instructors strive to offer comments that pose questions to provoke thinking.

As is consistent with classroom assessment theory that emphasizes learning, criteria are offered to learners and their initial feedback is collected (Sluijsmans, 2002). Past evaluation designs are offered mid-course for learners to explore the criteria. Working in pairs, learners use the criteria and ICE (Ideas, Connections, Extensions) model to assess the examples and identify how the designs could be strengthened (Fostaty-Young & Wilson, 2000; Wilson, 1996). This same model is later used to measure their evaluation designs. Criteria include the following:

- constructions of visual and narrative representations of evaluation context, evaluation stakeholders, and descriptions of program theory;
- identification of evaluation type, theory/approach, and purposes;
- delineation of evaluation questions for addressing purpose;
- identification of data sources and of data collection and analysis procedures;
- proposed reporting strategies for promoting use;
- suggested resources; and
- overall communication.

Presentations happen during a final celebratory class that includes community partners. Each learner prepares a poster and gives a brief oral presentation to everyone before submitting the full design to partners and instructor. Outside of class time, learners repeat their self-assessment based on the CES competencies, paying attention to growth and reflecting on progress toward the initial goals. Although there is a substantial amount of assessment activity prior to final submissions, the focus of earlier assessments is formative, whereas submissions at the end of the course constitute a graded assessment as part of the learners’ overall attainment.

LESSONS LEARNED

Reflecting on the use of an authentic assessment in our evaluation courses allows us to tease out and present thinking that had previously been implicit. In doing so, we identify three insights pertinent to the consideration of collaborative
Collaborative Evaluation Designs as Course Assessment

evaluation designs as an authentic assessment, and we relate our insights to our instructional processes and key characteristics of authentic assessments, described in Table 2. Common to the three insights is that everyone involved—instructor, learners, peers, and community partners—plays an essential role.

**Time commitment**

A commitment of time through the duration of the course is required for everyone involved. Without question, collaborative evaluation design with a community partner is an ambitious undertaking from an instructor’s perspective, but the learning benefits make it well worthwhile. Time is necessary for instructors to engage in reflection upon their own professional and instructional experiences and to clearly communicate expectations to everyone involved. Given that graduate courses last only a few months, learners must immerse themselves quickly with decisive actions and skillfully navigate the project with their community partners. Learners are encouraged to draw from their past experiences and interweave insights from their other courses to assist with their progress.

Central to the success of this course is the quality of relationships. Since evaluation is not conducted in isolation, relationships must be nurtured within and beyond the class; these relationships are key to promoting learning over a sustained and complex task. While there is a danger of any of the required investments or budding relationships failing, this has not happened in either of our experiences. Instead, we have been able to support and/or pivot when difficulties arose, provide materials to proactively encourage learning, and intervene as needed. We suggest that our many positive experiences are related to our intentional balancing of time commitments throughout; this helps us teach and model the fact that patience and perseverance, with oneself and others, are always required while immersing in new learning and decision making throughout a collaborative evaluation design. While it is possible for some students to feel disillusioned, stressed, or overwhelmed, we maintain that a well-organized and facilitated authentic assessment with an investment of time and energy provides a low-risk, supportive learning environment for developing an evaluator’s knowledge, skills, and competencies.

**Learning disposition**

A disposition for learning highlights the importance of being flexible and open to new experiences as an evaluator. When working in real-life contexts, learners, instructors, and community members benefit when they are attuned to and willing to embrace teachable moments. A teachable moment can include any of the variabilities, challenges, and successes of evaluation practice. These moments can arise in the form of a new leader, an emerging priority, a directive from a funder, a misplaced computer file, or even an unexpected weather occurrence! The outcome of these moments is similar: an opportunity to reflectively examine the situation and look for information to guide evaluation decision making.

Flexibility and openness also relate to an instructor’s ability to recognize each learner’s perspectives and experiences and to understand that different kinds of
Table 2. Relating our insights from the collaborative evaluation design experiences to our descriptions of instructional process and key characteristics of authentic assessments

<table>
<thead>
<tr>
<th>Insights for guiding authentic assessments in evaluation education</th>
<th>Instructional processes applied to evaluation education</th>
<th>Key characteristics of authentic assessments*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Evaluation course and assessment planning</td>
<td>Evaluation-focused instruction and learner development</td>
</tr>
<tr>
<td>Time commitment</td>
<td>Engage in reflection and with resources</td>
<td>Explicit course expectations</td>
</tr>
<tr>
<td>Learning disposition</td>
<td>Engage in new pragmatic procedures</td>
<td>Engage in new roles and responsibilities</td>
</tr>
<tr>
<td>Practice relevance</td>
<td>Create guiding framework</td>
<td>Develop evaluation-specific expertise</td>
</tr>
</tbody>
</table>

* See list above
materials and feedback may be required to optimize growth. Opportunities for instructors to tailor teaching are enhanced when course planning allows for small-group discussions in class as well as the provision of supplementary materials and/or detailed feedback online. When it comes to assessments, clear expectations and previewing of the ICE model provide guidance.

**Practice relevance**

Authentic assessments focus on maintaining professional relevance, and collaborative evaluation design is aligned with the knowledge, skills, and competencies required in evaluation. Additionally, many of the skills—planning, collaborating, thinking critically, accessing resources—are transferable to other professions. Learning from a theoretical course and operationalizing this learning in professional practice with a community partner is challenging; a range of skills and knowledge must be exhibited by the learner in coordination with the community partner and context, where the design is intended to be used.

At the end of the course, learners produce and present their product to showcase the knowledge they have developed. Learners are often nervous and proud, many are pleased with their efforts and also critical of their designs, and almost everyone is impressed by how much they have learned and accomplished throughout the course. The range of experiences and emotions in this authentic assessment aligns with the professional practice of evaluation. Importantly, learners are able to reflect and identify areas for future growth, and at the end of the course they seem themselves as professionals who have entered the field of evaluation.

To conclude, while several models for short-term projects within evaluation education have been described (e.g., Trevisan, 2004), we argue, similarly to Hurley and colleagues (2005), that learning in the field can provide a valuable experience for novice evaluators. We advance our collaborative evaluation design as prioritizing deep learning about evaluation standards, competencies, theories, and approaches while engaging in the real-world design of an evaluation. We recognize and advocate that no single course could expose a learner to the complexity or variety of evaluation encounters that a professional may experience. Instead, we encourage learners to use the metacognitive processes (e.g., reflective writing, self-assessment, and peer consultation) embedded within our courses to identify their strengths and areas for growth so as to continue to establish targets for ongoing evaluator learning.

We have discovered that authentic assessment allows for multiple kinds of knowledge and skills that are shaped by innumerable variables as learners transform their understanding into professional practice. Collaborative evaluation design has the strong potential for developing what Chouinard and colleagues (2017) refer to as an “epistemology of evaluation” (p. 495), where the interplay between theory and practice is experienced in authentic assessment. Integrating instructors, learners, community partners, and peers in reciprocal learning experiences may be construed as a form of boundary crossing, where collaboratively crafting the evaluation design creates the possibility for learning within
individuals and groups, across a diversity of sites, both within and across institutions (Akkerman & Bakker, 2011). We urge readers to consider the potential for a collaborative evaluation design or other form of authentic assessment as an essential form of evaluation education.

REFERENCES


AUTHOR INFORMATION

Michelle Searle is an assistant professor of Educational Evaluation at Queen’s University. She holds the Credentialed Evaluator (CE) designation from the Canadian Evaluation Society and is a member of the Ontario College of Teachers (OCT). Michelle focuses on increasing the usefulness of program evaluation through a collaborative approaches and innovative forms of dissemination.

Cheryl Poth is professor in the Centre for Applied Measurement and Evaluation in the Department of Educational Psychology, Faculty of Education, University of Alberta, and a co-founder of the Alberta Clinical and Community-Based Evaluation Research Team. Her research interests include evaluation use with particular emphasis on developmental, participatory, and collaborative evaluation approaches.
Pinpointing Where to Start: A Reflective Analysis on the Introductory Evaluation Course

Robyn Thomas Pitts
University of Denver

Abstract: This reflective analysis details four approaches to an introductory course for evaluation learners within a methodologically focused graduate-level program on statistics, measurement, and research design. Evidence of student learning outcomes, or SLOs, was utilized within Gibbs’ reflective cycles to redesign the course using Fink’s integrated course design process. The purpose of each approach varied along a theory-practice continuum, including theory, theory-to-practice, practice, and evidence building. The purpose, SLOs, and learning experiences of each approach are accompanied by longitudinal reflections on evaluation learners, course purposes, and the creation of a multi-course learning progression. This exploration offers perspectives and lessons learned that may assist new and experienced instructors in determining how an introductory course may best fit the learning needs of their students.

Keywords: assessment in higher education, evaluation education, evaluation educator, Gibbs reflective cycle

Résumé : La présente analyse réflexive décrit quatre approches possibles pour un cours d'introduction en évaluation dans le cadre d'un programme de cycle supérieur de statistiques, de mesure et de design de recherche, axé sur la méthodologie. Des données liées aux résultats d'apprentissage des étudiantes et étudiants ont été utilisées dans le cadre des cycles réflexifs de Gibbs pour refonder le cours en utilisant le processus de conception de cours intégré de Fink. L'objectif de chaque approche varie en fonction d'un continuum théorie-pratique, y compris la théorie, la théorie à la pratique, la pratique et l'établissement de preuves. L'objectif, les résultats d'apprentissage des étudiantes et étudiants et les expériences d'apprentissage liées à chaque approche sont accompagnés de réflexions longitudinales sur les apprenantes et apprenants en évaluation, les objectifs de cours et la création d'une progression d'apprentissage étalée sur de multiples cours. Cette exploration propose des perspectives et des leçons apprises qui pourraient aider les formatrices et formateurs, tant en début de carrière qu'avec de l'expérience, à déterminer la façon dont un cours d'introduction peut le mieux répondre aux besoins d'apprentissage de leurs étudiantes et étudiants.

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Evaluation is a discipline whose theories and practices are applied across myriad settings. Its enigmatic, transdisciplinary nature (Scriven, 2003) provides a considerable impediment to teaching it. When there is no consensus about what constitutes “good” evaluation, educators are challenged to characterize “good” evaluation education. Within the growing body of research (see King & Ayoo, 2020), there are no established purposes, goals, and learning outcomes for graduate study in evaluation; educators disagree about whether theory or practice provides the best entry point into graduate-level training; and learners come from diverse disciplinary backgrounds and prior knowledge of evaluation, ranging from those who lack methodological training to those with years of experience as accidental evaluators. Subgroups have different goals for learning and doing evaluation (Gullickson, 2020), and the number and type of courses needed to prepare future evaluators are unclear. As a result, learner experiences vary considerably across graduate programs (Gullickson et al., 2019).

Educational standards matter because program and course design follow a backward design: Educators start with the end goal in mind. Three other key design principles for high-quality learning include alignment of curriculum, instruction, and assessment; emphasis on learning that results in long-term value; and differentiation for inclusion and accessibility (Fink, 2016). While backward design and alignment focus on understanding course content and pedagogy, the latter two principles focus on customizing learning experiences by understanding who learners are. Integrated course design utilizing these principles advances significant learning, achieved through engaging, high-energy learning processes that result in lasting change and long-term value (Fink, 2013). Since learning occurs across courses, and learners build new knowledge on pre-existing cognitive structures (Gurlitt, 2012), programs of study benefit from careful consideration of cross-course learning through curriculum mapping and learning progressions (Duncan & Hmelo-Silver, 2009; Duschl et al., 2011). Early learning experiences are often instructor-led through guided instruction that introduces new concepts and models ways of thinking about new material. Subsequent learning gradually transfers responsibility for learning from instructor to learners though collaborative learning and independent practice (Fisher & Frey, 2008).

Here I explore four approaches to an introductory evaluation course that vary by focus: theory, theory-to-practice, practice, and evidence building. I used the Gibbs (1998) reflective cycle to make sense of my experiences re-designing the course. I offer hard-earned lessons to help instructors determine how an introductory course may best fit students’ learning needs, provide a summary of literature regarding evaluation education and an overview of the Gibbs reflective cycle, and then reflect on the learners, course purpose, and progression of learning across the approaches, concluding with thoughts for university-based evaluation educators.
TEACHING EVALUATION

At the broadest level, evaluation education is facilitated through many forms of professional development (e.g., workshops, conference training, and in-person or online coursework), with university-based programs as the central setting for in-depth, longitudinal learning (Gullickson et al., 2019). Concerted effort has been made to map, update, and compare university-based evaluation training offerings in North America (see Hunter & McDavid, 2018, 2019; LaVelle, 2018, 2019). The International Society for Evaluation Education (ISEE) provides a professional community of practice that convenes through online and in-person meetings to share research findings and create collaborative working groups. In addition to engaging with other educators, instructors can leverage scholarly literature for instructional design.

METHODS

Following an interpretivist approach (Bakker, 2010), I explored four approaches to an introductory evaluation course, critically considering the value and meaning of the learning experiences. This reflective analysis was undertaken through the typical procedures of assessment in higher education, or HED (Banta & Palomba, 2014; Suskie, 2009), utilizing SLO evidence to drive improvement of educational programs (Kuh et al., 2015). In a New Directions for Evaluation issue on evaluation in HED, Rickards and Stitt-Bergh (2016) describe SLO assessment as “utilization-focused outcome evaluation with goals that include program/organization improvement and an integration of evaluative thinking in the program and organization” (p. 7).

Positionality

My teaching philosophy is structured around the Gradual Release of Responsibility Model (Pearson & Gallagher, 1983) that promotes learning progressions along a scaffold of cognitive complexity (Dreyfus & Dreyfus, 1980; Fisher & Frey, 2008). I have engaged in SLO assessment at the course and program levels for the past 13 years—as an educator and new teacher trainer, an educational administrator, and an assistant professor and assessment fellow. I have worked as an instructional designer, instructional coach, and educational evaluator in K-12, medical education (MedEd), and HED. As a researcher, I study university-based evaluation training. Though I value structure, I view learning as an idiographic, place-based unfolding that should not be intentionally constrained: Learning experiences should be facilitated in alignment with desired competency development along a general continuum of increasing expertise. My training and experiences in teacher education and MedEd provide a basis for my use of SLO evidence to improve student learning experiences.

Context

Our three-credit-hour introductory evaluation course is taught within a private university on the quarter system, an academic term with 10 class sessions (each
2 hours and 20 minutes in length, generating around 23 hours of seat time and 45–70 potential hours of non-contact study time). Our learners include master’s and doctoral degree-seeking graduate students. Though our program is situated within a college of education, our learners are not trained in the substantive knowledge base of education; rather, they study various social science research approaches and tools that can be deployed across a range of applied settings. Our courses are also designed to serve graduate students across the college of education. Prior to 2019, our program offered a single course on evaluation. We are currently developing more robust evaluation training opportunities through multiple evaluation-oriented courses and field experiences.

Data collection and analysis

The data for each reflective cycle included SLO evidence collected through artifact analysis from course-embedded assessments (i.e., intake survey, self-appraisals, artifacts from active learning activities, rubric ratings and narrative comments from presentations and reports, and end-of-course examinations and projects). I also recorded anecdotal notes immediately after each teaching session, engaged in discussions with individual learners, and hosted small-group discussions.

During each course, I analyzed formative assessment data from weekly written reflections or quizzes to identify areas for clarification and remediation. I presented these trends at the outset of each session to guide whole-class discussions of hotspots, tricky concepts, and hard-to-apply skills, discussed these trends and areas for development with my teaching assistants in weekly meetings, and analyzed these evidence sources to generate assessment reports of program-level SLOs. I also discussed my findings with other evaluation educators, benefitting from reviewing and adapting resources they shared. Finally, I attended ISEE meetings and set up conversations with other evaluation educators to discuss detailed issues and address teaching challenges.

Between courses, I examined the learning experience in each approach to the course by following the Gibbs reflective cycle, a structured reflection process for learning from experience that proceeds through six steps: describe the experience without judgment, identify your reactions and feelings during and after the experience, make value judgments about what was good or bad within the experience, make sense of the experience through analysis, draw general and specific conclusions about what else could have been done, and develop an action plan to carry learning forward. To successively approximate the course toward one that would achieve meaningful and long-lasting learning for students, I analyzed evidence of SLOs, integrated new curricular resources to address hotspot areas, and pulled literature on teaching strategies from articles on evaluation education and teaching in HED. I also identified helpful online resources (e.g., didactic presentations on various topics and course syllabi from other programs), using search engines and the library of the teaching of evaluation topical interest group.
FINDINGS AND DISCUSSION

Tables 1–4 illustrate how changing the course purpose altered the SLOs and learning experiences. Each table represents the product of my Gibbs reflective cycle as an action plan for carrying learning forward. Tables include a narrative summary of my longitudinal reflections on learners, course purposes, and the creation of a multi-course learning progression. My goal in redesigning the course using the integrated course-design process (Fink, 2016) was to improve the quality of the student learning experience based on course parameters (i.e., a three-credit-hour course meeting weekly for ten weeks). I also sought to position students’ learning about evaluation within the appropriate sequence of their graduate study in order to best achieve our program-level SLOs. The fourth and final approach (Table 4) represents the most appropriate entry point into studying evaluation for learners within our program.

Evaluation learners

Integrated course design around significant learning experiences (Fink, 2013) hinges on understanding who learners are. Over the past three years (2017–2019), the number of students in the introductory evaluation course ranged from 18 to 22 each year, including 36% master’s-level methodology students, 52% doctoral-level students, and 12% doctoral-level students.

Table 1. Approach 1: Introductory evaluation as a survey of evaluation theories

<table>
<thead>
<tr>
<th>Survey of evaluation theories (2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
</tr>
<tr>
<td>A survey of evaluation theorists and theories</td>
</tr>
<tr>
<td>Student learning outcomes (SLOs)</td>
</tr>
<tr>
<td>1. Understand what evaluation is and how it differs it from research</td>
</tr>
<tr>
<td>2. Understand standards for evaluation and some theories/theorists from the 1960s through today</td>
</tr>
<tr>
<td>3. Explicate how program evaluation reflects the evaluator’s theoretical orientations</td>
</tr>
<tr>
<td>Learning experiences and assessments</td>
</tr>
<tr>
<td>Weekly student-led presentations on evaluation theorists</td>
</tr>
<tr>
<td>• How theorists entered the field</td>
</tr>
<tr>
<td>• Where and from whom they studied</td>
</tr>
<tr>
<td>• How their approach connected with other branches of the tree</td>
</tr>
<tr>
<td>• Main contributions of their work to the field of evaluation</td>
</tr>
<tr>
<td>Class videoconferences with evaluation theorists</td>
</tr>
<tr>
<td>Culminating project</td>
</tr>
<tr>
<td>• Group evaluation plan from a use, methods, or value lens (groups)</td>
</tr>
<tr>
<td>• Reflection on how theory influenced plan (individuals)</td>
</tr>
<tr>
<td>• Presentation to peers in class</td>
</tr>
</tbody>
</table>

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### Table 2. Approach 2: Introductory evaluation as translating theory-to-practice

<table>
<thead>
<tr>
<th>Purpose</th>
<th>An introduction to evaluation theory and its role in evaluation design</th>
</tr>
</thead>
</table>
| Student learning outcomes (SLOs) | 1. Differentiate evaluation from research  
2. Appraise and apply evaluation theories  
3. Analyze evaluation reports using knowledge of theory  
4. Develop an evaluation study prospectus  
5. Apply standards and guiding principles to evaluation scenarios |
| Learning experiences and assessments | Active learning (e.g., whole- and small-group discussions, evaluating cookie logic and other activities [Preskill & Russ-Eft, 2005])  
Personal reflection on what evaluation is and related personal experiences (rubric)  
Critique of two evaluation reports  
Culminating project  
• Annotated bibliography on one evaluation theory  
• Evaluation study prospectus (with peer review) using theory  
• Presentation to peers and community partners in class |

Methodology students, and 12% non-methodology doctoral students who tend to matriculate into leadership positions within educational organizations and nonprofits. Among the methodology students, the relative proportion of master’s- and doctoral-level students ranged from 25% to 54%, with an overall average of about 40% master’s-level students. Methodology learners aspire to work as applied statisticians, measurement specialists, researchers, and/or evaluators. The majority of students taking the course did so to fulfill a curricular requirement within their program of study, with only about 7% (4/59) identifying as evaluators (or aspiring evaluators) at the course outset. This increased to about 22% (10/59) upon completion of the course, a gain of two to four students each year. Of these evaluation-focused graduate students, 70% are master’s-level learners. Based on an intake self-appraisal, almost all students indicated minimal to moderate knowledge of evaluation, minimal to moderate experience doing evaluation, and virtually no knowledge of evaluation theory, approaches, or frameworks.

Understanding these frequencies is important, as different student subgroups have different needs for learning about evaluation. Since 78% of the students in the introductory course did not aspire to careers in evaluation, they did not require competency in designing evaluation studies utilizing evaluation theory. Learners of methodology at the master’s level needed to develop competencies to prepare them to work on research and evaluation teams. Education doctoral students in non-methodological programs needed an awareness of the field, including how
Table 3. Approach 3: Introductory evaluation as practice via team-based service learning

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Practice via team-based service learning (2018)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student learning outcomes (SLOs)</td>
<td>A practical introduction to the evaluative process</td>
</tr>
<tr>
<td>1. Analyze the quality of evaluation studies to identify strengths/weaknesses/unknowns and suggest improvements</td>
<td></td>
</tr>
<tr>
<td>2. Design evaluation studies with faculty and community partners using knowledge of diverse modes of inquiry</td>
<td></td>
</tr>
<tr>
<td>3. Communicate study design and findings with clarity, both orally and in writing according to APA format and for clients</td>
<td></td>
</tr>
<tr>
<td>4. Demonstrate professionalism by employing research ethics when engaging with community partners</td>
<td></td>
</tr>
<tr>
<td>Learning experiences and assessments</td>
<td>Active learning (e.g., whole-group discussions, evaluating cookie logic [Preskill &amp; Russ-Eft, 2005], presentations, cross-team communities of practice for discussion and feedback)</td>
</tr>
<tr>
<td>Culminating project</td>
<td>Evaluation plan (with peer review) following the CDC self-study guide (CDC, 2011)</td>
</tr>
<tr>
<td></td>
<td>Technical report</td>
</tr>
<tr>
<td></td>
<td>Stakeholder-friendly report for community partners</td>
</tr>
<tr>
<td></td>
<td>Peer and self-assessments</td>
</tr>
<tr>
<td></td>
<td>Presentation to peers and community partners in class</td>
</tr>
</tbody>
</table>

to partner with evaluation specialists. And for the 22% of students desiring careers in evaluation, further coursework and applied experiences were necessary to build on the foundational knowledge of the introductory course. These learner needs suggested that the introductory course should centre on positioning new learning about evaluation relative to prior learning about social science research, particularly by co-constructing areas of similarity and difference to ground learners’ perceptions of the scope and utility of evaluation services.

**Purpose of the introductory course**

The scope of the course, which evolved in response to integrated course design processes (Fink, 2013), was initially theoretical, with a small applied assignment. After the course, students could not readily translate their learning about evaluation theory into practice because they lacked an understanding of working with stakeholders to identify information needs, describe the program context, and generate recommendations for future action. The scope of the second, theory-to-practice approach was too broad: The 10-week course lacked time to engage
**Table 4.** Approach 4: Introductory evaluation as systematic evidence building

| Purpose | An introduction to designing evaluation studies  
A first course within a three-course sequence on evaluation |
| --- | --- |
| Student learning outcomes (SLOs) | 1. Elaborate ways in which research and evaluation are dis/similar  
2. Analyze requests for evaluation services to determine the domain of the evaluation questions and methods  
3. Develop an evaluation matrix with a research component or a research matrix with an evaluation component |
| Learning experiences and assessments | Weekly responses to open-ended questions on key ideas within each domain of evaluation questions and methods, identification of information needs and generation of evaluation matrices for cases aligned with weekly topic/reading, small-group discussions of articles  
Culminating project  
• Reflection on careers in evaluation (i.e., analyze job descriptions; identify evaluators working in types of evaluator roles)  
• Evaluation prospectus with a research component or a research prospectus with an evaluation component  
• End-of-course examination |

deeply and critically with evaluation theory and apply it to study designs. The third, practical approach was challenging to implement because some students struggled to practice evaluation while learning about it for the first time. The fourth approach moved away from issues of evaluation theory and practice altogether: Focusing on the scope and utility of evaluation and its relationship to social science research, it facilitated a more robust introduction to the field as a systematic means of determining the merit, worth, or significance of an evaluand. This arguably narrow focus was possible only because we increased the number of evaluation courses to enable more robust study of evaluation, theory, and practice.

**Introducing a learning progression**

To address some issues related to the purpose and scope of the course, SLOs initially packed within a single course were distributed across multiple courses in a mapped learning progression. Learning progressions provide coherent environments for learning that unfolds over time by promoting alignment of curriculum, instruction, and assessment (Duncan & Hmelo-Silver, 2009; Duschl et al., 2011); they have been used in K-12 education (Herman, 2013), teacher education (Jin et al., 2015), and medical education (Vantini & Benini, 2008). This year-long, three-quarter learning progression aimed to prepare learners to feel confident working on evaluation teams led by others. Our initial learning progression
proceeded by identifying reasonable prerequisite learning, appropriate SLOs for the introductory course, and a pathway into subsequent courses.

**Prerequisite learning**

The introductory course was designed to help a heterogeneous student audience position their understanding of evaluation relative to research, a learning goal reasonable only if learners start the course with an operational understanding of social science research. As such, prerequisite courses were added to the sequence so that learners developed an understanding of intermediate statistics (e.g., introductory statistics, correlation, regression, and analysis of variance [ANOVA]), the philosophical assumptions and designs within qualitative inquiry (i.e., narrative, ethnography, case study, grounded theory, phenomenology, and arts-based and criticism/connoisseurship approaches) and quantitative inquiry (i.e., experimental, quasi-experimental, single-subject, correlational, comparative, and descriptive designs), and design/selection of appropriate data collection/analysis methods (e.g., sampling, interviewing, surveying, developing scales, and reviewing ethics).

**Student learning outcomes**

The scope of the introductory course as systematic evidence building (Table 4) was designed to support learners in making connections between evaluation and social science research. The learning goals further focus on identifying information needs within requests for evaluation services, and developing evaluation matrices (CDC, 2007) that align information needs with domains, research designs, indicators, sources, and methods. Formerly depicted as a pyramid (Rossi et al., 2004), the five domains provide a framework for systematically building evidence by understanding the need for a program and its logic or theory prior to evaluating its processes, outcomes/impacts, or efficiency/optimization. When evidence is missing at a more basal level, findings from evaluative work at subsequent levels may not fully meet the expectations of the standards for program evaluation (Yarbrough et al., 2011). The introductory course increases student understanding of these evaluation-specific aspects of study design and is a launchpad into subsequent learning of evaluation theory and practice.

**Subsequent learning**

Our program seeks to prepare graduates who can contribute to evaluation teams (master’s) and lead studies (doctoral) across numerous applied settings. In the new courses within the evaluation sequence, students worked on teams to conduct an evaluation following Davidson’s (2005) approach, bolstered with principles for collaborative and participatory approaches to evaluation (Shulha et al., 2016) as well as culturally responsive approaches (Chouinard & Cram, 2019). Though students completing all three courses were expected to identify the appropriateness of evaluation questions and methods and to facilitate evaluation studies, they were not well prepared to design and implement their own studies. Study design leveraging evaluation theory, engagement with perennial issues of the field, and
Figure 1. Aggregative evidence building through the five domains of evaluation questions and methods, adapted from Rossi et al. (2018)

research on evaluation were relegated to additional coursework and field experiences beyond the three-course sequence.

CONCLUDING THOUGHTS

Understanding who learners are is key to designing courses that advance meaningful and long-lasting learning. To determine an entry point into learning evaluation within a program of study, instructors can interrogate learner needs and design courses around learning goals that are shared between subgroups. It is unlikely that a single evaluation course can adequately prepare learners to understand the nature of evaluation, help them leverage theory in study design and implementation, and provide them with experiential or service-learning opportunities. Ideas and concepts can be introduced early in a learning sequence, then studied more deeply in subsequent coursework designed to gradually transfer responsibility for learning from instructors to students (Fisher & Frey, 2008). Learning progressions can be helpful tools for generating coherence
in cross-course learning regarding instructional design decisions related to curriculum, instruction, and assessment.

Descriptions of these four approaches to an introductory course only convey their design related to the course purpose, SLOs, and learning experiences; they do not accurately reflect the depth and breadth of learning, which should not be artificially constrained to focus solely on pre-defined competencies. Learning is a sociocultural endeavour rooted in one's personal and cultural biographies (Chouinard et al., 2017), and summaries of course components cannot adequately represent the breadth and malleability of student learning experiences.

While the four approaches are presented as an evolution over time, no single approach is intrinsically superior in its usefulness; indeed, a universal entry point into graduate study of evaluation seems unlikely. The scope of an evaluation course will vary based on program SLOs, the disciplinary domain in which evaluative learning will be applied, and the types of learners for whom the course is designed. This diversity of approaches is simultaneously an asset and a weakness: While learners can select among programs with slightly different foci to accentuate their particular needs and goals, there is no assurance that graduates from across these programs have similar understandings of the field and of how to do evaluation. Entry points into the field will likely always vary; our challenge as evaluation educators is to determine a shared vision for what a degree in evaluation represents and to work backward from that goal in order to engage our learners where they are.

REFERENCES


**AUTHOR INFORMATION**

Robyn Thomas Pitts is an assistant professor at the University of Denver. She began her career as an educator and educational evaluator in K-12 and medical education. Currently, she studies evaluation education, teaches graduate coursework on evaluation and mixed methods research, and directs REACH (the Research, Evaluation, & Assessment Collaboratory Hub at DU).
In Their Own Words: Student Key Learning Experiences in an Introductory Evaluation Course

John M. LaVelle and Zhou Yang
University of Minnesota

Abstract: Reflections by students on their key learning experiences in evaluation courses can provide useful data for educators seeking to identify the most impactful aspects of their teaching practice. In this practice note we describe how an instructor has included active reflective practice as part of their teaching practice, and how both the instructor and a graduate student analyzed other student reflections on key learning experiences to help improve the course. We first analyze these reflections using grounded theory, then perform two additional analyses, one using Fink’s taxonomy of significant learning and the second using both the Canadian Evaluation Society’s Competencies for Canadian Evaluation Practice and the American Evaluation Association’s Competencies framework. We conclude by reflecting on how the frameworks provided helpful data to understand and improve the practice of teaching evaluation through the lens of the student learner.

Keywords: course design evaluation, reflection, student learning, teaching of evaluation


Mots clés : évaluation du design d’un cours, réflexion, apprentissage étudiant, enseignement de l’évaluation

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Evaluator education, a sub-field within evaluation research, focuses on where, how, and why evaluators are educated and socialized into the profession (Gulklickson et al., 2019). King and Ayoo (2020) suggest ten major domains within evaluator education that researchers and scholars might investigate, including university-based systems (LaVelle, 2019; LaVelle & Donaldson, 2010), pedagogies for the teaching of evaluation (LaVelle et al., 2020), the importance of practical learning experiences (Trevisan, 2004), and the needs of learners from different disciplines (Christie et al., 2014). Much of the recent literature, however, focuses on evaluator education systems and the educators themselves, with comparatively little attention on student learning or the ways in which data on this learning can be used in course design/redesign (King & Ayoo, 2020).

In response to this gap, we describe how we use students’ reflections on key learning experiences in evaluation courses as data with which to examine our teaching practice.

RETROSPECTIVE AND PROSPECTIVE REFLECTION

Dewey (1933, p. 9) described reflection as an “active, persistent, and careful consideration of any form of belief or knowledge . . . and the grounds that support it and its conclusions.” Shulman and Colbert (1989) later described reflective practice as the process of thinking backwards in time to analyze past events and behaviours and their consequences. Many evaluator educators and evaluation practitioners advocate for active reflective practice (King & Stevahn, 2014), and reflection is highlighted as a critical aspect of practice for both Canadian and American evaluators (AEA, 2018; CES, 2018). Reflection is important for high-quality evaluation practice, allowing evaluators to learn both from successes and from challenges that may have led to mistakes. Examples of retrospective reflections have been compiled into the book Evaluation Failures (Hutchinson, 2019), a gathering of stories and reflections to help evaluators process the successes and challenges in a completed evaluation.

Conway (2001) argued that reflective learning focused exclusively on past events is limited in its utility unless the reflector actively builds a cognitive link to future experiences and behaviour. He called this focus on the past a temporal truncation that can be addressed through anticipatory or prospective reflection (van Manen, 1995). In his phenomenological study on the preparation of teachers and their anticipated/real experiences in the classroom, Conway illustrated the utility of using prospective and retrospective reflections in tandem to understand the processes and meaning making of teachers’ professional practice. He concluded that prospective reflection could assist with transitioning into a new work culture, anticipating challenges, and reinforcing learning. Similar lessons may be learned in evaluator education, by asking students both to reflect on past course content and experiences and to anticipate how these reflections will help inform future attitudes, thoughts, and behaviours.
KEY LEARNING EXPERIENCES

A “key learning experience” refers to an important learning event or process that was particularly impactful for the learner and is elicited through a reflective prompt. Boyd and Fales (1983) suggested that students’ reflection on impactful experiences is a critical component of experiential learning and that an educator experienced in reflecting on reflection itself should help foster the students’ reflective process. Indeed, because asking students to reflect on their key learning experience from a course can elicit discomfort as well as excitement (Boyd & Fales, 1983), the reflective process should be structured to allow students to feel both positive and negative emotions without judgement. Resolving the emotional state with new perspective is what prompts the “aha” moment for the reflector, leading to the conscious realization that their perspective has shifted. Timoššuk and Ugaste (2012) later concluded that both positive and negative key learning experiences play an important role in the development of the professional identity of teachers; it is likely that the same is true for evaluators.

FRAMING STUDENT REFLECTIONS

Research on student reflections from classroom experiences varies greatly from field to field, and, depending on the discipline, the content of these reflections can range from the philosophical to the immediately practical, which makes their organization and analysis a challenge. Though little is currently known about students’ reflections from evaluation-specific courses, at least three frameworks exist to help organize the data, each providing distinct insights into what students found most memorable. First, a grounded theory process (e.g., Miles & Huberman, 1994) lets us read the students’ reflections and see what categories emerge organically. Second, Barnes and Caprino’s 2016 illustration of Fink’s (2003) taxonomy of learning outcomes offers a helpful framework for organizing students’ reflections from a service-learning course; the data can be organized in terms of foundational knowledge, application, integration, human dimensions, caring (new values and perspectives about self or others), and learning how to learn (p. 565). Third, we can use a competency-based framework such as the CES Competencies for Canadian Evaluators (2018) or the AEA Competencies (2018). Illustrating different aspects of student learning, all three approaches have value for educators.

PROCESS

The Institutional Review Board at University of Minnesota-Twin Cities categorized this scholarship as “exempt” because the data were collected as part of the regular course assessment process.
Context and participants

I—the first author—have taught the *Introduction to Evaluation* as a practice-based course for over ten years across three universities. My course has reached more than 400 graduate and 100 undergraduate students from a range of disciplinary backgrounds including psychology, organizational behavior and development, human resource development and education, K-12 and higher education, public health, public policy and administration, and business. I designed the course as a service-learning course that meets one evening per week (*Furco, 1996; Furco & Billig, 2001; LaVelle et al., 2020*). I review and update my course materials every semester based on student feedback and performance, incorporating additional information from an ongoing scan of the evaluation job marketplace and from the students’ reflections on their key learning experiences.

Course content and student experiences

The course topics and outline closely follow the main topics in *Russ-Eft and Preskill’s (2009)* textbook *Evaluation in Organizations*. Topics include defining and describing evaluation, the logic of evaluation, evaluation theories of practice, evaluator roles, politics, stakeholder-driven logic models, outcome definitions, evaluation design and inquiry methodology, communication strategies, and budgeting. Students are required to engage in service learning to design and deliver a formal evaluation proposal for their community partner. The proposal elements undergo several rounds of public and private review, with students presenting the logic models, stakeholder-generated outcome descriptions contrasted with scholarly definitions, stakeholder-driven key evaluation questions, and the students’ proposed design, data-collection tools, budget, and anticipated communication strategies.

Prompts for reflection

All students participating in my *Introduction to Evaluation Practice* course respond to three reflective questions on their take-home final exam. Because of the reflective nature of the questions, I distribute the exam the first night of class and refer students to it throughout the semester. The first question prompts students to develop a personal statement about evaluation and describe both the field and its processes using non-technical language. The second asks them to take a philosophical stance on evaluation’s role in social justice, and the third prompts them to reflect for one page on their key learning experience from the course—specifically, on their most impactful learning and how it will influence their future behaviour and/or perspectives. This prompt is what generated the qualitative data analyzed in this practice note. The exam weighs 10% of the final grade and is an important component that fosters learning transfer. We analyzed all students’ responses; no sampling was required.

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DESCRIPTIONS OF STUDENT LEARNING

The richness of the qualitative data called for multiple approaches to its analysis (Tashakkori & Teddlie, 1998). As a team, we holistically analyzed the student course data at the paragraph level of analysis, using three processes. For each approach, we used a random sample of fifteen student responses (approximately 5% of the total responses) to familiarize ourselves with the framework and build intra-team consensus on how the students’ words matched onto the themes. First, we used a grounded theory/taxonomy-free inductive approach wherein we read the reflections and compiled a list of major themes. After discussing the themes iteratively to build inter-rater agreement and to reduce their number, we arrived at three major groups: personal development, professional development, and career development. We next used a deductive approach based on Fink’s (2003) taxonomy of significant learning outcomes, and then on the broad categories offered by the CES Competencies for Canadian Evaluators (2018) and the AEA Competencies (2018).

Table 1 illustrates the results of the grounded theory-free inductive analysis. Several broad categories emerged; while these are presented orthogonally, many of the student reflections intersected to include personal, professional, and career-development topics. We differentiated “professional development” from “career development” because the constructs exist on two different conceptual levels; in general, professional development has a more immediate focus on technical and interpersonal skills, while career development focuses on a future career trajectory supported by a person’s interests, skills, and abilities (Chaplowe & Cousins, 2016).

Table 2 presents the student reflections categorized by Fink’s (2003) taxonomy of significant learning outcomes. Because it forces them into predetermined categories, this taxonomy broadly organizes the reflections into a structure more amenable to course design/redesign. Student responses suggested that most key learning experiences were linked with the application of evaluation principles and concepts to practice; remaining ones were linked with foundational knowledge of the field and with its humanistic/interpersonal dimensions. Less emphasis was placed on caring or on learning how to learn.

The third step we took was to compare the student key learning experience narratives with the available North American Evaluator Competency frameworks. We began with the broad domains of the AEA competencies (2018) because the authors are located in the United States, and then used the CES competency domains (2018) (see Table 3). Though the student narratives broadly aligned with many of the competencies, readers should interpret this crosswalk cautiously because students were asked to reflect on their most impactful learning moment, not to describe their understanding of every aspect of evaluation practice after a single course experience. We found it interesting, however, that many of the reflections aligned with the interpersonal/humanistic aspects of the competencies, and comparatively fewer discussed the more technical aspects of evaluation work.
### Table 1. Student reflections organized by inductive themes

<table>
<thead>
<tr>
<th>Learning outcome</th>
<th>Illustrative quotes</th>
<th>Reflections</th>
</tr>
</thead>
</table>
| Personal development | The key thing I’ll remember is how important patience is in an evaluation process... nothing went as quickly as I imagined.  
I learned about personal strength and resilience; it is critical for evaluators and other workers to bounce back from challenges.  
This really changed my perspective on people that participate in human service programs, and I think I am more sensitive to them now. | Some of the most important learning is not based on the course content itself, but instead on how the student grew as a person.                                                                                   |
| Professional development | I learned to not take problems at face value, and to try and find ways around them.  
The way we communicate, and the words we use, really influence the way we are viewed by others, both in the evaluation team and by the stakeholders.  
This experience made me less sure of myself, but in a good way. I think I’m more aware of the things I bring to an evaluation and my limitations too.  
I’ll definitely remember everything that goes into getting good data; tools [like surveys, interviews, observations] are good, but are hard to do well. | Important learning experiences can impact students beyond the classroom and into the person they want to become in their future work.                                                                         |
| Career development | It wasn’t a single moment. I started this class hating evaluation and thought the class would be a waste of time... I could feel my hatred begin to fade, and eventually thought of it as a possible career track.  
Making us find job descriptions as part of the class made me practice looking for jobs, and it made me actually think about what I needed to compete for them.  
Understanding of evaluator’s work, job duties, opportunities, and pitfalls in evaluation project.  
Application of evaluation knowledge and experience working as an evaluator. | Memorable learning experiences can help students see the options available to them, and then they get to decide if the option is right for them.                                                   |
### Table 2. Student reflections organized by Fink’s taxonomy

<table>
<thead>
<tr>
<th>Learning outcome</th>
<th>Definition</th>
<th>Illustrative quotes</th>
<th>Reflections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundational Knowledge</td>
<td>Refers to the students’ ability to understand and remember specific information and ideas.</td>
<td>The class made me realize that even a small evaluation project took lots of considerations. I had never really thought through the reasons for looking at initiatives, but now I have words to help me articulate them. I realized how little I knew about conducting formal evaluations, even though they are part of my job description.</td>
<td>The foundational ideas and principles are important, especially around the language I am teaching my students. Beyond remembering theories and approaches to evaluation, I hope they will remember the relationship evaluation has with so many other fields. These reflections remind me that much learning happens when students try to apply their knowledge, even to everyday things like cookies and clothing; many of us use evaluative tools daily, but a course like this can make learners more mindful of it.</td>
</tr>
<tr>
<td>Application</td>
<td>Application learning allows other kinds of learning to become useful.</td>
<td>The cookie activity was my first “a-ha” moment of the class, and the most memorable experience in my graduate school career, as we tried to define criteria about an everyday object [cookie], and how much harder it is for something like a program. It was when we used the 3x5 card sorting activity to organize the [research and evaluation] design for our project and a bunch of hypothetic (but realistic) scenarios.</td>
<td>The individual tools of evaluation may not be new, but their application and synthesis with other courses and topics can promote new learning.</td>
</tr>
<tr>
<td>Integration</td>
<td>The act of making connections gives learners a new form of power, especially intellectual power.</td>
<td>Using a box of 3x5 cards to show us how flexible the pieces of research design are helped me understand what my other classes mentioned but never really “clicked” for me. I never realized how much my classes in counseling would help me in evaluation.</td>
<td></td>
</tr>
</tbody>
</table>

(Continued)
<table>
<thead>
<tr>
<th>Learning outcome</th>
<th>Definition</th>
<th>Illustrative quotes</th>
<th>Reflections</th>
</tr>
</thead>
<tbody>
<tr>
<td>Human Dimension</td>
<td>This kind of learning informs students about the human significance of what they are learning.</td>
<td>I realized the importance of stakeholder involvement … our team could not have been successful without building a strong relationship with [name]. I learned how important it is to develop the [key evaluation] questions with the stakeholder, to try to understand their perspective with compassion and understanding, but still help them reframe the questions into something an evaluation can answer. I learned how important it is to have a stakeholder/client that cares about you and the project, and is willing to support you as you grow.</td>
<td>For me, this is one of the high points of evaluation courses, because it moves evaluation away from being a technical exercise and positions it as a humanistic activity with real-world implications for ourselves and other people.</td>
</tr>
<tr>
<td>Caring</td>
<td>When students care about something, they then have the energy they need to learn more about it and making it a part of their lives.</td>
<td>I realized how much I actually care about human services programs. I didn’t really understand it until this class. It wasn’t a single moment, I started this class hating evaluation and thought the class would be a waste of time … I could feel my hatred begin to fade, and eventually thought of it as a possible career track. Every person has value and possesses the ability to pick each other up when someone is down.</td>
<td>It is interesting to see how sometimes students just need a little phrasing or a bit of context to realize how passionate they are about a topic.</td>
</tr>
<tr>
<td>Learning How to Learn</td>
<td>This kind of learning enables students to continue learning in the future and to do so with greater effectiveness.</td>
<td>I realized how important it is to have classes that don’t just give you an answer to every question … I struggled with the “it depends” answer, but to forced me to stretch beyond what I thought I knew.</td>
<td>As an educator, I sometimes want to give my students “the answer,” but I know that by letting them struggle with the content, they can learn and integrate it deeply.</td>
</tr>
</tbody>
</table>

*Note. Definitions are from Fink (2003, pp. 31–32).*
<table>
<thead>
<tr>
<th>Domains</th>
<th>Illustrative quotes</th>
<th>Author reflections</th>
</tr>
</thead>
<tbody>
<tr>
<td>CES: Reflective</td>
<td>My interview with [a professional evaluator] taught me so much about what it's actually like to do evaluations and to get paid for the work . . . I was surprised at how much she emphasized the Guiding Principles and the Standards.</td>
<td>In some ways, it doesn't surprise me that many of my students' reflections were about reflective practice or professional practice, since I emphasize understanding self in this course. It makes me wonder if I emphasize reflection in my courses more now than I did as a more junior teacher.</td>
</tr>
<tr>
<td>CES: Reflective</td>
<td>I learned it is okay to make mistakes when you are learning, so long as you try to fix them and not make the same ones again.</td>
<td></td>
</tr>
<tr>
<td>practice</td>
<td>I was amazed by the different approaches to evaluation, and it was so interesting that different [theoretical] approaches could lead to such different evaluation proposals.</td>
<td></td>
</tr>
<tr>
<td>CES: Technical</td>
<td>I found that evaluators can learn a lot from surveys when the surveys are good . . . I had always thought they were not good because they didn't give a lot of information . . . they do, but they are hard to develop!</td>
<td>It seems that my evaluation course can introduce students to a range of inquiry methodologies, but there isn't enough time to go in-depth for each one. I think it is reasonable to consider the teaching successful if they take away a few &quot;big ideas&quot; about inquiry as a whole.</td>
</tr>
<tr>
<td>CES: Technical</td>
<td>Using the 3x5 cards to organize the research design made the whole concept of design understandable.</td>
<td></td>
</tr>
<tr>
<td>practice</td>
<td>Using candy to illustrate how to conduct [quantitative and qualitative] data analysis really helped me understand how many ways the same data can be interpreted.</td>
<td></td>
</tr>
<tr>
<td>AEA: Professional</td>
<td>Using the “storytelling” technique to develop the logic model was critical for my evaluation. I think it put the client at ease and helped position us a critical friends instead of just students from the university.</td>
<td></td>
</tr>
<tr>
<td>AEA: Methodology</td>
<td>Using candy to illustrate how to conduct [quantitative and qualitative] data analysis really helped me understand how many ways the same data can be interpreted.</td>
<td></td>
</tr>
</tbody>
</table>
Table 3. (Continued)

<table>
<thead>
<tr>
<th>Domains</th>
<th>Illustrative quotes</th>
<th>Author reflections</th>
</tr>
</thead>
<tbody>
<tr>
<td>CES: Situational practice</td>
<td>I realized how important context is to doing evaluation . . . some of the things I heard from my classmates would never work in my indigenous context.</td>
<td>The contexts in which evaluators work influences much of what they think will be appropriate, and it makes me think about more and different ways to bring contextual components into my classes.</td>
</tr>
<tr>
<td>AEA: Context</td>
<td>I realized how an evaluation could unintentionally marginalize a community by excluding their voices from the process . . . maybe not in every context, but I’ll definitely remember that for future projects.</td>
<td></td>
</tr>
<tr>
<td>CES: Management practice</td>
<td>I realized just how much work and effort goes into just planning the evaluation, and we didn’t even carry it out this semester!</td>
<td>I am happy when my students appreciate all the little steps that go into an evaluation proposal, but the relatively low frequency of comments make me wonder if budgeting and planning need a greater emphasis in my course.</td>
</tr>
<tr>
<td>AEA: Planning and development</td>
<td>I didn’t realize how intricate budgeting is, and had no idea how much I could even ask for doing something like an evaluation!</td>
<td>Reflections like these made me realize I needed to do a better job of helping my students form their groups and set expectations. Most have never done an evaluation or “real” project before, so I need to help them be successful. I cannot assume it will happen without support.</td>
</tr>
<tr>
<td>CES: Interpersonal practice</td>
<td>Definitely the biggest lesson was about my team and setting expectations early . . . we had a lot of problems until we discussed what we brought to the team and what our pet peeves are.</td>
<td></td>
</tr>
<tr>
<td>AEA: Interpersonal</td>
<td>I definitely took away that this field heavily relies on trust and personal investment.</td>
<td></td>
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</table>
TEACHER REFLECTION

I find teaching evaluation exhilarating and take great joy in helping students learn while also providing conceptual—and sometimes operational—support for community partners that work and serve communities near the university. Like most program stakeholders, I also experience a bit of the usual evaluation anxiety when it comes time to examine my own teaching practice (Donaldson et al., 2002), though I take a formative lens on the practice. Indeed, reflection on my teaching of evaluation is as critical to my development as an educator as reflective evaluation practice is to the practicing evaluator.

After the semester is complete and I have submitted final grades to the Registrar, I closely review my syllabus, teaching materials, and teaching activities. I then review the student key learning experience data and reflect on the purpose of the course itself. With this introductory program evaluation course, my aim is to give students an introduction to the field and its foundational documents (e.g., the AEA Guiding Principles, Standards, Statement on Cultural Competence, Competencies etc.), and help them contrast several theoretical approaches to evaluation practice. I also want them to develop evaluation and inquiry skills while they provide conceptual support to a community partner. And I have the implicit goal—not a learning objective—of the course experience helping to humanize the students, the course content, and the community partners (LaVelle, 2020). In sum, my course is meant to develop critical consumers of evaluation and increase students’ familiarity with the field, not necessarily to create stand-alone professional practitioners (Morris, 1994); I believe that would require several courses in evaluation that are explicitly supported by inquiry methods and data analysis.

With these goals in mind, I review the student reflections and the syllabus side-by-side, looking for broad alignment between the reflections and the major topics outlined in the syllabus and teaching materials. I assume that when specific teaching activities are described several times as impactful, they were mainly effective for this group of students. For example, students often point to our use of chocolate chip cookies to illustrate evaluation logic as their key learning experience (Preskill & Russ-Eft, 2016), so I maintain both the activity and its current framing without much change. As well, students often reflect on the activities that address cultural assumptions, research design, and the development of program logic models through role-playing, so I will maintain these activities in the future as well. Not all of my activities, however, make it into the reflective papers, which I take as an indication that I should re-examine both the activity and the topic I was trying to address. Lack of discussion doesn’t necessarily mean that the activity was bad or implemented poorly, though that could certainly be the case; it could simply mean that other learning experiences were more impactful for this group of students.

The process of writing this paper has helped me think further about the goals and outcomes of an evaluation-specific course, how to solicit reflections (Boyd & Fales, 1983), and how to organize these reflections so I can understand where and how the course worked for the students and where I should make
adjustments. The inductive approach to analyzing student reflections helped me see where my students were both professionally and personally, but it lacked the structure to provide insights on how to improve my teaching practice. Similarly, the CES (2018) and the AEA (2018) Competencies frameworks were too detailed to be helpful; they left me with a sense of having failed my students because of the impossibility of addressing each competency in depth in a single course (Tucker, personal communication, 2018). They might be more appropriate for analyzing a series of workshops or an entire curriculum than a single course. Framed another way, this experience taught me that educators must be selective about which competencies are targeted in a single course.

By contrast, Fink's (2003) taxonomy of significant learning outcomes was immensely helpful in organizing the students' reflections into broad clusters that I use to understand my teaching practice. Most memorable for me were the student reflections about what it meant to be a good teammate, the students who said the course helped them think differently about people who participate in programs, or the ones who realized they had a passion for helping specific groups of people. These “humanistic” reflections have influenced how I approach my courses and how I encourage students to consider the programs they are proposing to evaluate (LaVelle, 2020), as well as which aspects of evaluation practice I emphasize in my class.

Ultimately, the students' reflections on their key learning experiences have proven to be a rich source of ideas and inspiration, allowing me to take a critical look at my teaching practice and seek continuous improvement. They have also given me an opportunity to ask my students how my class and my teaching have made an impact in their lives and perspectives. As a teacher, evidence of influence within and beyond the classroom is the greatest reward I could hope for.

STUDENT REFLECTION

The process of analyzing student reflections was an interesting experience, and I—the second author—saw that my peers took different learnings from the class even though we had similar in-class experiences. Using the different frameworks helped me see how frequently used words and ideas could mean very different things based on how they were communicated, contextualized, and analyzed.

First, I found that reflections on key learning experiences can be used as a tool to identify students’ intended and unintended learning outcomes. As a student, I assume that many professors design their courses with the intention that they be useful for students later on, but the connection between what is taught and what is memorable is not always clear to either professor or student. In these reflections, many students started by describing their “aha” moments, then explaining how what they learned can be applied to their future evaluation practice or work. Others described drawing connections between their experiences and their perception of future professional behaviours—connections that can be applied across contexts—or learning that they have a passion (or not) for community-engaged work.
This experience has made me more aware of the importance of the language used by professors and others to introduce new ideas and reinforce important concepts. The students’ key learnings came from many sources, including class activities, lectures, group meetings, and meetings with clients, meaning that educators must be consistent in their use of words and examples as they introduce and reinforce central ideas. I also started to look at the jargon that people learn in the classroom, and realized that a person can be very professional and respected even when using non-technical language. As I look back at the course description and other documents, I realize how much attention was paid to making the content serious but accessible.

I found the reflections an interesting source of ideas for making changes to the course design and teaching strategies, and think that the prompt encouraged students to be honest about their most important experience because there were no “wrong” answers. Some students introduced their “aha” moment by describing a specific challenge or difficulty they encountered and indicating “I wish I had . . .” or “I should have . . . .” Professors can use these reflections to understand where students struggled and address these difficulties the next time the course is taught. These reflections can also prompt a teacher to consider what they would do in a similar situation and what they would advise the student to do differently next time.

The reflection seems an important chance for students to relearn or solidify their understanding of the course material, as they revisit that material and reflect on what worked and didn’t. Some students share that evaluation theories and models look easy when we discuss them in class, but are difficult to apply in practice. This kind of reflection could be an important aspect of many courses, both inside and outside of evaluation, because it moves the focus of the learning away from a test or project to something more substantial: how to identify individual strengths and limitations, and to overcome challenges.

Finally, this experience reinforced to me the importance of process-based as well as content-based courses for both evaluation majors and non-majors. The majority of students who wrote these reflections were not evaluation majors, but were from fields such as social work, natural sciences, human resources, and public health. Many shared in the reflection assignment that the course not only helped them gain knowledge about evaluation, but helped prepare them for consulting positions, entrepreneurship, or work in an organization. They may not remember some of the specific content, but they can look that up later; what I think they will remember is the experience of designing an evaluation proposal for the first time and the explicit linking of an intensive course with valued and marketable skills.

**CONCLUSION**

In this paper we have introduced active reflections as part of course design, analyzed how students’ reflections on their key learning experiences help improve a
course, and how reflection assignments build up students’ interpersonal skills, professional competencies, and career readiness. Both the instructor and student found students’ reflections to be an effective method for maximizing learning outcomes, an efficient approach to summarizing successful experiences, and a chance to learn what can be done better and how to make improvements. We hope other educators will follow this process. The costs are low, and the rewards great.

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written on the intersection of job markets and university programs, techniques for recruiting evaluators, evaluator competencies, the psychology of evaluators, and how evaluators can use social science theory to inform their practice. He was awarded the American Evaluation Association’s Marcia Guttentag Award in 2019.

Zhou Yang is a doctoral student in human resources development at the University of Minnesota. She received her M.Ed in human resources development in 2016. Her research interest resides at the intersection of organizational theory, strategy, and evaluation, with a focus on understanding how talent development programs shape and guide behaviours in organizations, and how it affects individual and firm performance.
Re-Envisioning Evaluation Pedagogy with a Community of Scholar Teachers

Jill Anne Chouinard  
*University of Victoria*

John M. LaVelle  
*University of Minnesota—Twin Cities*

“[The] educator must be awake, critical, open to the world. It is an honor and a responsibility to be a teacher in such dark times—and to imagine, and to act on what we imagine, what we believe ought to at last be”

*(Maxine Greene, 2005, p. 80)*.

“It is crucial that critical thinkers who want to change [their] teaching practices talk to one another, collaborate in discussion that crosses boundaries and creates a space for intervention”

*(bell hooks, 1994, p. 129)*.

This special volume is motivated by our interest in the pedagogy of evaluation, in an ongoing concern with how best to teach evaluation to novice evaluators without reducing the field to a set of techniques. Ultimately our goal with this volume is to contribute to a dialogue about teaching evaluation and to build an active, engaged community of scholar teachers, what *bell hooks* (1994) might call “a community of learners” (p. 153). Our goal is not to identify “best practices” in terms of teaching evaluation, a problematic term that implies some type of shared standard regardless of context (*Calliou & Wesley-Esquimaux*, 2015), but rather something more modest: to provide the opportunity for scholar teachers to share the diversity of their pedagogical practices, as well as their reflections on the challenges, opportunities, and complexities such teaching inevitably entails. We did not direct them about what to write; we simply asked that they share creative or innovative teaching practices that they have developed or used in the classroom, practices that they felt were pedagogically novel.

The format of the practice note is ideal, as it provides the opportunity for authors to describe their innovative approaches to teaching and to critically reflect on their experiences. Following this format, each of the articles remains under 3,000 words, with each providing a brief description of a teaching innovation, followed by key reflections on practice. Taken together, these articles highlight the multiple and diverse approaches, styles, locations, and contexts of teaching, whether enacted in a classroom, online, in professional workshops or through

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community engagement during an evaluation or evaluation practicum. The range of topics and pedagogical approaches and strategies illustrates the multiplicity of roles, perspectives on evaluation, values, and philosophical positions held by evaluators across the breadth of the field. In this concluding chapter, we synthesize the key pedagogical approaches, strategies, concerns, and aspirations described by the contributors to this volume, focusing our synthesis on key pedagogical moments. Beyond this, this concluding article challenges the community of scholar teachers to think about the ethical, cultural, political, and philosophical implications of their pedagogical practices in evaluation.

In looking across all of the 15 articles, it seems clear that our colleagues all share extensive ambitions and hopes for the field, as well as a willingness to challenge the use of existing methods and techniques, and to portray evaluation as more than an extractive science. A number of the articles focus on the “liberatory potential” (Archibald, p. 315) of the field, a shift away from methodological or procedural technique toward evaluative thinking, critical reflection, mentoring, social justice, decolonization, or disruption (e.g., Archibald; Arias Orozco et al.; Bowman; Boyce; Chapman et al.; Gokiert et al.; LaVelle & Yang). Others focus their articles on the use of assessment scales to measure the acquisition of skills and learning, as well as descriptions of models to encourage deeper reflection (e.g., Pitts; Searle & Poth; Smith). Still others turn to competency-based approaches to ensure learning and the development of evaluator dispositions (e.g., Davies; LaVelle & Yang; McDavid & Shepherd; Poth & Searle). We also note a significant focus on interpersonal relationships, whether among students, faculty, and clients (or a mix therein) or between students working together in collaborative arrangements with clients or together on class projects (e.g., Lovato & Graham; Montrosse-Moorehead; Smith). Some of the contributors focus on case-based learning approaches (e.g., Archibald; Gokiert et al.), with others highlighting student fieldwork in their engagement with external clients (e.g., Arias Orozco et al.; Montrosse-Moorehead; Searle & Poth). There is also substantial emphasis on reflective practice, whether within the classroom among students and faculty, or individually, as scholar teachers seek a deeper level of analysis and personal reflection on their own teaching and on the pedagogy of evaluation (e.g., LaVelle & Yang; Lovato & Graham; Pitts; Searle & Poth; Smith). Finally, we also note struggles in adapting Western models in non-Western contexts and in shifting emphasis from the academy to the community (e.g., Archibald; Arias Orozco et al.; Bowman; Chapman et al.).

In the space between theory and practice, the line between the classroom (virtual or in-person, synchronous or asynchronous) and the world is redrawn through reflection, action, and engaged praxis. Freire (1970) makes an important distinction between what he calls the “banking concept of education,” where students are considered empty vessels that need filling, and “problem-posing education,” where students and teachers become co-learners or co-investigators in a process of critical dialogue and reflection. This latter approach to education is based on the values of creativity, engagement, collaboration, reflective practice, and dialogue, all of which are essential in a field as culturally and philosophically

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diverse and dynamically complex as evaluation. Notions such as problem-posing education and critical reflection are quite apparent in all of the practice notes, as contributors seek to make meaning out of their teaching and student learning experiences, and in their struggle to bridge what they describe as a shift from theory to practice. While we acknowledge the many potential interpretations and understandings in the diverse contributions of this volume, in what follows we describe four broad themes that we feel capture the pedagogical essence of the volume.

**REVISIONING EVALUATION**

One of the central concerns in the pedagogy of evaluation is the tension between cultivating a critical, moral, political, and reflective capacity while still providing the technical knowledge and skills required in evaluation practice (Schwandt, 2015). While this tension is not made explicit in the articles, the majority of contributors emphasize the less tangible and more difficult to measure aspects of the field, such as interpersonal skills, evaluation dispositions, collaboration, and reflective capacity. With the acknowledgement that “good evaluators are more than methodological technicians” (p. 391), Montrose-Moorehead brings the focus of her practice to the development of interpersonal skills and the need for building trusting relationships. For international students (see Arias Orozco et al.), their concerns are not technical in nature, but focused on understanding program context, communication, and language. After one year of evaluation instruction, the students reflect:

> ... we consider openness, flexibility, and humility to be key components of our profession, and essential in enabling us as international students to address the many challenges we experienced. Evaluation work requires us to reflect on and be aware of our cultural identity in order to ground our positionality, assumptions, and biases. (Arias Orozco et al., p. 418).

For Archibald, evaluative thinking provides a bridge between theory and practice, a way to engage learners in a philosophical reflection about methodological assumptions as well as about the moral and political implications of evaluation practice. Davies, for his part, engages students in discussion about competencies and connections to evaluator dispositions (beliefs and values), highlighting the associated ethical, cultural, and personal tensions, especially given the lack of consensus on such issues in our field. In her article, Bowman seeks to reposition evaluation from its current location as an “expressway to information generation” to a “pathway to wisdom,” to a critical revisioning of evaluation and evaluation pedagogy as a deeply reflective practice on self, knowledge construction, and impact on other communities. In her article on mentoring students of colour, Boyce builds upon Ladson-Billings’s concept of culturally relevant pedagogy to highlight the interrelated concepts of self/others, social relationships, and knowledge as essential in mentoring relationships. Other contributors to this volume also focus their pedagogies on teaching aspects of evaluation that are not often found in the “toolkit,” such as communication, trust, vulnerability, relationship building,
and so on (e.g., Chapman et al.; Lovato & Graham; Searle & Poth; Smith). As Archibald summarizes, “as important as these technical competencies are, they remain secondary to understanding the conceptual and even philosophical underpinnings of evaluation practice” (p. 313).

**PEDAGOGY AS TRANSFORMATION**

In the articles, we also note the active engagement of students as central participants in their own educational experience. Contributors eschew a top-down approach to teaching, in favour of one where students and teachers together engage (often with community members) in constructing and reconstructing the pedagogical landscape. The classroom thus becomes, as hooks (1994) describes, “a location of possibility” (p. 207). This change, while mirroring a pedagogical shift in education more generally, mirrors a fundamental transformation in evaluation practice, where participants evolve from the position of “subject” to that of “participant” in the knowledge-construction process. In their struggle to create a meaningful and culturally appropriate context for teaching evaluation in an African setting, Chapman et al., create what they refer to as a “model client” approach to pedagogy. In this approach, the client, whose project students are working on, joins the class and becomes an active and important participant (a co-evaluator) along with students and the instructor. As Chapman et al. state, “in teaching evaluation, pluralistic teaching and learning approaches (e.g., coursework, mentorship, peer exchanges) are similarly recognized as part of the broader process to develop, reinforce, and sustain different evaluation competencies that underlie strong evaluation practice” (p. 378). Gokiert et al., for their part, create a constructivist pedagogy as a way to promote peer learning between faculty, students, funders and community partners. As they state, “rather than students going into the community for practicums or community service learning, UEval brings the community to the classroom” (p. 287). Similarly Searle and Poth use a collaborative classroom design that focuses on the quality of relationships both inside and outside the classroom, as well as outside, with clients. Smith highlights good communication skills as essential in evaluation, stating “setting up the learning environment as a lateral space for open communication sets the stage for more authentic reflection on how we go on together” (p. 409). Notwithstanding the online format of their courses, McDavid and Shepherd strive to create an online learning environment that engages students in what they refer to as “deep learning” based on multiple techniques and approaches developed according to the principles of adult learning. Using a competency-based teaching approach, Poth and Searle strive to ensure that students become active participants in their own learning, building learner-centred choices and metacognitive practices into their pedagogy.

**CULTURAL TENSIONS**

A number of contributors (e.g., Arias Orozco et al.; Bowman; Boyce; Chapman et al.) challenge the cultural dominance of Western methodological approaches to
evaluation theory and practice, arguing for a shift to local knowledge and to a more culturally responsive pedagogy. For Chapman et al., the “model client” is intended to bring a more “made in Africa” approach to the classroom and to the curriculum, a shift in power dynamics to encourage shared perspective between client, students, and faculty. For Boyce, the use of culturally relevant pedagogy for mentoring relationships with students of colour brings a focus to students’ cultural context, as a way to ensure cultural integrity through centring the teacher-student relationship, as well as an appreciation of epistemological and pedagogical plurality. Culturally relevant pedagogy calls on the teacher (or mentor) to consider the impact of trauma, building mutual peer support for students, respecting and honouring students’ culture, religion, and family values, acknowledging microaggressions when they occur, and developing mentoring competence as it relates to issues of diversity. In her practice note, Bowman, an Indigenous, self-described “blue collar scholar,” speaks to the cultural and privileged location of evaluation scholars and practitioners in the academy, arguing for the need to centre and decolonize our pedagogical practices through a process of critical self-analysis and critically engaged praxis. For their part, as international students, Orzco et al. are keenly aware of the challenges they might experience applying Western-based methodologies and understandings in their home contexts. Their advice to teachers of evaluation is to develop an awareness of cultural differences and to “look beyond the application of their frameworks and perspectives to understand that there is not one unique approach for doing evaluation, but many, depending upon the program and its cultural context” (p. 418).

**DYNAMIC AND REFLECTIVE PRACTICE**

A final theme that echoes through all the practice notes is the use of critical, purposeful reflection, what Freire (1970) might consider a form of engaged pedagogy or praxis (reflection and action in the world in order to change it). Reflexive practice, as Arias Orozco et al. state, “can help us navigate complex contexts” (p. 418). As Bowman makes clear in her article, praxis begins with self, with critical self-reflection about the impact of our own ways of thinking and interacting. For Archibald, evaluative thinking becomes a catalyst for reflective practice on four levels: in terms of the role evaluation plays in broader society, at the level of self-knowledge, in terms of “reflection-in-action” (see Argyris, 2004), with connections to values, social justice, and critical praxis, and as a meta-reflective activity. Others build reflective practice into their evaluation curriculum, encouraging students to complete reflections on their learning experiences, competencies, major course learnings, and collaborative and online group processes (e.g., Davies; Gokiert et al.; LaVelle & Yang; McDavid & Shepherd). For some, reflection is initiated through the development of specific instruments for use by students as a way to measure applied learning and “optimize” evaluator education (e.g., Lovato & Graham; Searle & Poth; Smith). For Lovato and Graham, the focus of the practice note is on the use of an instrument called “Team Performance Scale,” which they use to help students reflect on the behaviours of high-performing
teams. Searle and Poth, for their part, integrate a type of “authentic assessment” into their collaborative design as a way to focus on the learning process, and integrate feedback and reflection into the learning process. For others, individual reflections on learning experiences (e.g., Pitts) and the contrasts between educators’ reflections and student reflections (e.g., Arias Orozco et al.; LaVelle & Yang; Lovato & Graham) illustrate the pluralities of structured and semi-structured reflective approaches used in an educational context with a focus on making the course and its individual experiences as impactful and meaningful as possible.

CONCLUSION
Reading through the contributions to this volume, we are reminded that evaluation is a transdisciplinary practice influenced by ideas, concepts, principles, and theories from across multiple and diverse fields of study. As evaluators and evaluation instructors, we draw on social and behavioural sciences, evaluation models and approaches, program theories, philosophies, moral and ethical theories, and so forth, the intertwining of which has pedagogical consequences in terms of how we teach and in terms of what we teach. We bring who we are to the classroom and to the community. We teach what we know and what we aspire to become. Our reflections as teachers and evaluation practitioners are not separate from our actions (Freire, 1970). The notion of the “reflective practitioner” (Schon, 1983) speaks precisely to this complementary relationship between our thoughts and our actions, between our understanding and our practice, between what we think and what we do. Schwandt (2015) speaks about the need for aspiring evaluators (and all of us) to develop what he calls “a life of the mind for practice” (p. 143). We cannot divorce what we are doing from why we are doing it, and from what such doing entails. The theories we draw on in our field provide the moral and ethical foundation upon which we frame and shape our judgements, our actions, and our practice.

For us, a key aspiration as co-editors is to deepen critical analysis in the field of evaluation and to build a community of scholars, practitioners, and teachers who collectively challenge the moral, cultural, and practical fabric of our field. This is what these times require. Thus, while these practice notes illustrate the breadth of the field, as well as some of the less technical and more nuanced aspects of our profession, we would nonetheless like to challenge our peers to think about the social, political, cultural, and ethical impact of our work as evaluators (and teachers), not only locally in the community and in the classroom, but more globally as well. How does our work as teachers and evaluators contribute to the social good? How does our field contribute to “social betterment”? How is our field (and the work of evaluators) connected to the neoliberal agenda and to globalization? Where do our responsibilities as evaluators lie? What impact do we (and can we) hope to have on the health of our planet? How are we connected to these global crises? How do we amplify the many voices and perspectives in our work? How can we decolonize the practice of evaluation? What is our role in decolonization?
How can our actions and our work contribute to democracy and equity? More challenging still, as teachers of evaluation (often located in faculties of education, public administration, and psychology), how do we teach our students to think about these broader, yet arguably more important critical, moral questions, while also developing their technical expertise? While we recognize the difficulty of addressing these questions, we firmly believe that the meaningfulness of our field will ultimately be measured, not by how many indicators were created and evaluated, but by our continued relevance in contributing to creating a more humane, just, and democratic future for all life on the planet.

REFERENCES


AUTHOR INFORMATION

**Jill Anne Chouinard** is an associate professor in the School of Public Administration at the University of Victoria. Much of her evaluation work has been conducted in culturally and socially diverse community settings, where she has extensive experience leading evaluations at the community level in the areas of education, social services, public health, and organizational learning and change. She positions evaluation as a catalyst for learning, collaboration, equity, social justice, and community change.

**John M. LaVelle** is an assistant professor in evaluation studies at the University of Minnesota. His research examines how universities prepare evaluators for applied work, and he has written on the intersection of job markets and university programs, techniques for recruiting evaluators, evaluator competencies, the psychology of evaluators, and how evaluators can use social science theory to inform their practice. He was awarded the American Evaluation Association’s Marcia Guttentag Award in 2019.
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