

The 2018 AEA Evaluator Competencies

Our two-part charge from the AEA Board:

- 1 Frame an initial draft set of competencies that builds on foundational documents and is the next step in professionalizing.
- 2 Engage AEA members in conversation about what makes evaluators distinct as practicing professionals, arriving at a set of competencies that: serves as a roadmap for guiding evaluator education & training • encourages members to engage in critical self-reflection about strengths & limitations & find appropriate ways to expand & improve their practice • reflects the kinds of services evaluators are called upon to perform in multiple contexts • recognizes the interdependence & overlap of the domains • illustrates—as much as evaluation theory—who we are!

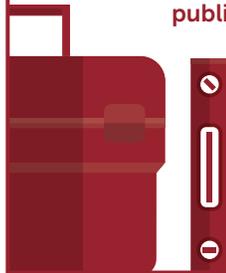
NOTE: We're discussing program evaluation only—not policy, product, or personnel.

Four ideas summarizing our intent

Pragmatic

Our intent was to do something useful—to move forward!

We worked to frame the competencies within the context of AEA's core values—including social justice & the public good.



These competencies are meant to be changed, edited, adapted.

Inclusive

We spent three years on this process—receiving a great deal of feedback & working hard to respond.

This is not a series of revisions by a small group of insiders, but rather the result of a long & thoughtful process that reached out in many ways.

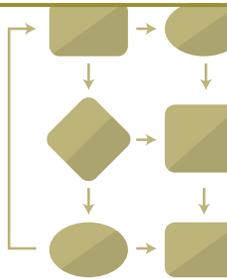


A proposed *NDE* volume will provide grounding & grist for next steps.

Our systematic, design-driven process—like a modified Delphi—engaged members in a holistic effort with multiple perspectives & multiple forms of feedback.

The survey was the final step in an iterative process, a tool to gather member input & feedback.

Intentional



There's motion here! The AEA Competencies are unlike the Program Evaluation Standards or the AEA Guiding Principles. These competencies are a document for engaging members through multiple forms of outreach.

We now have the opportunity to engage in community conversations.

Dynamic



2015 AEA CONFERENCE (CHICAGO) World Café-style listening post (gathered feedback on general competency domains, potential uses of competencies, & members' concerns about AEA proceeding to endorse a set of foundational competencies) • Listening posts at Wednesday & Friday evening receptions

Open solicitation of feedback on the AEA website (www.eval.org) that continued through 2018

1.0

DOMAIN

PROFESSIONAL PRACTICE

focuses on what makes evaluators distinct as practicing professionals

Professional practice is grounded in AEA's foundational documents, including the Program Evaluation Standards, the AEA Guiding Principles, and the AEA Statement on Cultural Competence.

The competent evaluator . . .

- 1.1 Acts ethically through evaluation practice that demonstrates integrity and respects people from different cultural backgrounds and indigenous groups.
- 1.2 Applies the foundational documents adopted by the American Evaluation Association that ground evaluation practice.
- 1.3 Selects evaluation approaches and theories appropriately.
- 1.4 Uses systematic evidence to make evaluative judgments.
- 1.5 Reflects on evaluation formally or informally to improve practice.
- 1.6 Identifies personal areas of professional competence and needs for growth.
- 1.7 Pursues ongoing professional development to deepen reflective practice, stay current, and build connections.
- 1.8 Identifies how evaluation practice can promote social justice and the public good.
- 1.9 Advocates for the field of evaluation and its value.

2.0

DOMAIN

METHODOLOGY

focuses on technical aspects of evidence-based, systematic inquiry for valued purposes

Methodology includes quantitative, qualitative, and mixed designs for learning, understanding, decision making, and judging.

The competent evaluator . . .

- 2.1 Identifies evaluation purposes and needs.
- 2.2 Determines evaluation questions.
- 2.3 Designs credible and feasible evaluations that address identified purposes and questions.
- 2.4 Determines and justifies appropriate methods to answer evaluation questions, e.g., quantitative, qualitative, and mixed methods.
- 2.5 Identifies assumptions that underlie methodologies and program logic.
- 2.6 Conducts reviews of the literature when appropriate.
- 2.7 Identifies relevant sources of evidence and sampling procedures.
- 2.8 Involves stakeholders in designing, implementing, interpreting, and reporting evaluations as appropriate.
- 2.9 Uses program logic and program theory as appropriate.
- 2.10 Collects data using credible, feasible, and culturally appropriate procedures.
- 2.11 Analyzes data using credible, feasible, and culturally appropriate procedures.
- 2.12 Identifies strengths and limitations of the evaluation design and methods.
- 2.13 Interprets findings/results in context.
- 2.14 Uses evidence and interpretations to draw conclusions, making judgments and recommendations when appropriate.

AEA Evaluator Competencies

SPRING-SUMMER 2016 A series of virtual and in-person focus group discussions using a structured guide with leadership & members of TIGs & affiliates • Targeted efforts to engage international members, who make up 20% of AEA's membership (reviewed proposed domains, specific items for each domain, & discussed pros & cons of defining evaluator competencies) • A guide for AEA Affiliate leaders to use at their annual meetings to solicit member feedback

2016 AEA SUMMER INSTITUTE (ATLANTA)
Follow-up listening post

2016 AEA CONFERENCE (ATLANTA)
Second series of listening posts

DECEMBER 2016
an aea365 week on the draft competencies in highlighting the dedicated feedback link on the AEA website



3.0

DOMAIN

CONTEXT

focuses on understanding the unique circumstances, multiple perspectives, and changing settings of evaluations and their users/stakeholders

Context involves site/location/environment, participants/stakeholders, organization/structure, culture/diversity, history/traditions, values/beliefs, politics/economics, power/privilege, and other characteristics.

4.0

DOMAIN

PLANNING & MANAGEMENT

focuses on determining and monitoring work plans, timelines, resources, and other components needed to complete and deliver an evaluation study

Planning and management include networking, developing proposals, contracting, determining work assignments, monitoring progress, and fostering use.

5.0

DOMAIN

INTERPERSONAL

focuses on human relations and social interactions that ground evaluator effectiveness for professional practice throughout the evaluation

Interpersonal skills include cultural competence, communication, facilitation, and conflict resolution.

The competent evaluator . . .

- 3.1 Responds respectfully to the uniqueness of the evaluation context.
- 3.2 Engages a diverse range of users/stakeholders throughout the evaluation process.
- 3.3 Describes the program, including its basic purpose, components, and its functioning in broader contexts.
- 3.4 Attends to systems issues within the context.
- 3.5 Communicates evaluation processes and results in timely, appropriate, and effective ways.
- 3.6 Facilitates shared understanding of the program and its evaluation with stakeholders.
- 3.7 Clarifies diverse perspectives, stakeholder interests, and cultural assumptions.
- 3.8 Promotes evaluation use and influence in context.

The competent evaluator . . .

- 4.1 Negotiates and manages a feasible evaluation plan, budget, resources, and timeline.
- 4.2 Addresses aspects of culture in planning and managing evaluations.
- 4.3 Manages and safeguards evaluation data.
- 4.4 Plans for evaluation use and influence.
- 4.5 Coordinates and supervises evaluation processes and products.
- 4.6 Documents evaluation processes and products.
- 4.7 Teams with others when appropriate.
- 4.8 Monitors evaluation progress and quality and makes adjustments when appropriate.
- 4.9 Works with stakeholders to build evaluation capacity when appropriate.
- 4.10 Uses technology appropriately to support and manage the evaluation.

The competent evaluator . . .

- 5.1 Fosters positive relationships for professional practice and evaluation use.
- 5.2 Listens to understand and engage different perspectives.
- 5.3 Facilitates shared decision making for evaluation.
- 5.4 Builds trust throughout the evaluation.
- 5.5 Attends to the ways power and privilege affect evaluation practice.
- 5.6 Communicates in meaningful ways that enhance the effectiveness of the evaluation.
- 5.7 Facilitates constructive and culturally responsive interaction throughout the evaluation.
- 5.8 Manages conflicts constructively.

SEPTEMBER 2017 Member survey on the content of the latest draft (roughly 1200 responses/16% response rate, including nearly 1100 separate comments)

2017 AEA CONFERENCE
(WASHINGTON, DC) Two sessions to gather additional feedback from members



What they are:

A common language & set of criteria to clarify what it means to be included in the definition of evaluator.

A way to make clear to everyone the important characteristics of professional evaluation practice & to challenge us to create pathways for engaging all types of people in becoming evaluators.

An inclusive approach that helps provide multiple clear pathways for entry into the practice.

The second of three steps in approaching the professionalization of the field:

1. Review foundational documents & reach out globally to learn from others.
2. Use the knowledge from Step 1 to develop & validate a set of AEA competencies grounded in member engagement (THIS IS WHERE WE ARE).
3. Begin to define how to recognize evaluator competencies.

A **guidemap** for the future.



The AEA Evaluator Competencies

What they are not:

These are not perfect & never will be.

They're not a way of excluding qualified people from the field.

They're not a way of addressing systematic challenges in the professionalization of the field.

They're not a credentialing or assessment system—those are separate issues, for future consideration.

MAY 2018 Submission to the AEA Board for approval along with a proposed process for the competencies' routine revision/updating

JUNE 2018 A proposal for a *New Directions* volume to present the competencies, much as AEA's Guiding Principles were originally presented

ONWARD!

