



The Canadian Evaluation Society

# Competencies for Canadian Evaluation Practice



## Introduction

This document provides a suite of competencies for evaluation work in Canada. Competencies are defined as “the background, knowledge, skills, and dispositions program evaluators need to achieve standards that constitute sound evaluations.”<sup>1</sup> These were developed through research, member consultation and expert validation processes conducted in 2008 and 2009.

While the Competencies for Canadian Evaluation practice were developed as part of the Credentialing Program of the Canadian Evaluation Society (CES), they provide a much broader foundation for the evaluation community. They can be used as a foundation for:

- **developing training programs** and deciding what skills and knowledge to incorporate in a learning event;
- **self assessment** by Evaluators to decide what professional development they want to pursue;
- **designing jobs**, writing job descriptions when deciding to employ evaluation expertise;
- **developing RFPs, SoWs or ToRs** when contracting for evaluation services;
- And **supporting decisions made in the Credentialing Program**.

The skills and knowledge in any profession or discipline grows and evolves over time. They are influenced by new research and changing environmental circumstances. Competencies are not static. There is a need to review and renew these definitional components of Canadian evaluation work on a systematic basis

## Competency Domains

Domains are high level categories under which the competencies are organized. Five domains have been identified for evaluation work in Canada. They are:

**1.0 Reflective Practice** competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one’s evaluation expertise and needs for growth.

**2.0 Technical Practice** competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation and reporting.

**3.0 Situational Practice** competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied.

**4.0 Management Practice** competencies focus on the process of managing a project/evaluation, such as budgeting, coordinating resources and supervising.

**5.0 Interpersonal Practice** competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.

<sup>1</sup> Potential Competencies for Evaluators is adapted from Stevahn, L, King, J., Ghore, G., & Minnema, J.,(2005) *Establishing Essential Competencies for Program Evaluators*, American Journal of Evaluation, Vol. 26 No. 1, March 2005 43-59 <http://aje.sagepub.com/cgi/content/abstract/26/1/43>



## Competencies:

The Competencies for Canadian Evaluation Practice are provided below:

<b>1.0 Reflective Practice</b> competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.
1.1 Applies professional evaluation standards
1.2 Acts ethically and strives for integrity and honesty
1.3 Respects all stakeholders
1.4 Considers human rights and the public welfare in evaluation practice
1.5 Provides independent and impartial perspective
1.6 Aware of self as an evaluator (knowledge, skills, dispositions) and reflects on personal evaluation practice (competencies and areas for growth)
1.7 Pursues professional networks and self development to enhance evaluation practice

<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.
2.1 Understands the knowledge base of evaluation (theories, models, types, methods and tools)
2.2 Specifies program theory
2.3 Determines the purpose for the evaluation
2.4 Determines program evaluability
2.5 Frames evaluation questions
2.6 Develops evaluation designs
2.7 Defines evaluation methods (quantitative, qualitative or mixed)
2.8 Identifies data sources
2.9 Develops reliable and valid measures/tools
2.10 Collects data
2.11 Assesses validity of data
2.12 Assesses reliability of data
2.13 Assesses trustworthiness of data
2.14 Analyzes and interprets data
2.15 Draws conclusions and makes recommendations
2.16 Reports evaluation findings and results



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**3.0 Situational Practice** competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied.

- 3.1 Respects the uniqueness of the site
- 3.2 Examines organizational, political, community and social contexts
- 3.3 Identifies impacted stakeholders
- 3.4 Identifies the interests of all stakeholders
- 3.5 Serves the information needs of intended users
- 3.6 Attends to issues of evaluation use
- 3.7 Attends to issues of organizational and environmental change
- 3.8 Applies evaluation competencies to organization and program measurement challenges
- 3.9 Shares evaluation expertise

**4.0 Management Practice** competencies focus on the process of managing a project / evaluation, such as budgeting, coordinating resources and supervising.

- 4.1 Defines work parameters, plans and agreements
- 4.2 Attends to issues of evaluation feasibility
- 4.3 Identifies required resources (human, financial and physical)
- 4.4 Monitors resources (human, financial and physical)
- 4.5 Coordinates and supervises others
- 4.6 Reports on progress and results
- 4.7 Identifies and mitigates problems / issues

**5.0 Interpersonal Practice** competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.

- 5.1 Uses written communication skills and technologies
- 5.2 Uses verbal communication skills
- 5.3 Uses listening skills
- 5.4 Uses negotiation skills
- 5.5 Uses conflict resolution skills
- 5.6 Uses facilitation skills (group work)
- 5.7 Uses interpersonal skills (individual and teams)
- 5.8 Uses collaboration / partnering skills
- 5.9 Attends to issues of diversity and culture
- 5.10 Demonstrates professional credibility



## Competencies for Canadian Evaluation Practice

The following elaborations of Evaluator competencies or **DESCRIPTORS** are designed to describe what is meant by and included in each of the competencies. In each case, they describe what **background, knowledge, skill** and **disposition** is demonstrated by the evaluator in conducting these actions.

<b>1.0 Reflective Practice:</b> Competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.	
1.1 Applies professional evaluation standards	<ol style="list-style-type: none"> <li>1) Apply the Canadian/US Joint Committee Program Evaluation Standards <a href="http://www.wmich.edu/evalctr/jc/">http://www.wmich.edu/evalctr/jc/</a></li> <li>2) Apply the five dimensions of the Standards; feasibility, propriety, utility, accuracy and meta evaluation</li> <li>3) Recognize the Standards are illustrative and to be used with discernment as required in diverse contexts and propriety obligations.</li> </ol>
1.2 Acts ethically and strives for integrity and honesty	Understand and adhere to Canadian Evaluation Society <u>Guidelines for Ethical Conduct</u> <a href="http://www.evaluationcanada.ca/site.cgi?s=5&amp;ss=4&amp;lang=EN">http://www.evaluationcanada.ca/site.cgi?s=5&amp;ss=4&amp;lang=EN</a>
1.3 Respects all stakeholders	<ol style="list-style-type: none"> <li>1) Acknowledge all input in an appropriate and timely manner</li> <li>2) Recognize own biases and strive to be equitable</li> </ol>
1.4 Considers human rights and the public welfare in evaluation practice	<ol style="list-style-type: none"> <li>1) Address the Joint Committee Program Evaluation Propriety Standards, particularly P1 "Responsive and Inclusive Orientation."</li> <li>2) Engage in open and participatory practices demonstrating that public welfare was considered</li> <li>3) Contextualize evaluation work within human rights regimes and rights-based approaches</li> <li>4) Consider roles and responsibilities of duty bearers and rights holders</li> <li>5) Identify diverse public welfare contexts and outcomes, including gender equality, age, sexual orientation, ethnicity, language, social class, disability, culture, religious beliefs and practices, customs and cultural norms</li> <li>6) Consider the balance between social and individual welfare for the good of society</li> </ol>
1.5 Provides independent and impartial perspective	<ol style="list-style-type: none"> <li>1) Able to speak truth to power while maintaining an objective frame of mind.</li> <li>2) Committed to present evaluation results as objectively as possible.</li> </ol>
1.6 Aware of self as an evaluator (knowledge, skills, dispositions) and reflects on personal evaluation practice (competencies and areas for growth)	<ol style="list-style-type: none"> <li>1) Accurately assess extent and type of knowledge required for a particular evaluations</li> <li>2) Demonstrate professionalism and responsibility</li> <li>3) Recognize her/his competency limits and engage others if these limits are exceeded</li> <li>4) Identify relevant areas for professional growth and improvement of skills.</li> </ol>
1.7 Pursues professional networks and self development to enhance evaluation practice	<ol style="list-style-type: none"> <li>1) Be a member of an Evaluation professional organization</li> <li>2) Be involved in the work of an Evaluation Society</li> <li>3) Attend learning events (conference, courses, etc) related to</li> </ol>



# Competencies for Canadian Evaluation Practice

## 1.0 Reflective Practice: Competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.

	evaluation practice
	4) Undertake experiential and on the job learning activities

## 2.0 Technical Practice competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.

2.1 Understands the knowledge base of evaluation (theories, models, types, methods and tools)	<ol style="list-style-type: none"> <li>1) Understand the history and development of evaluation</li> <li>2) Understand the parameters of social science research</li> <li>3) Understand evaluation as a separate trans discipline involving logic, design, policy studies, communication, statistics and others</li> <li>4) Understand the terminology, anthology of evaluation</li> <li>5) Understand the aims, processes and results of evaluation</li> <li>6) Understand a range of evaluation models, approaches and positions</li> </ol>
2.2 Specifies program theory	<ol style="list-style-type: none"> <li>1) Understand the component parts of a program theory of change/logic model and the linkages between component parts (e.g., inputs, activities, outputs; levels of outcomes)</li> <li>2) Consult with the client and other relevant stakeholders to identify the specific component parts for the program in question</li> <li>3) Identify the connections between and within the component parts (e.g., between activities and outcome, between activities, between outcomes)</li> <li>4) Identify logical and practical flow to the anticipated achievement of outcomes</li> <li>5) Understand the program and the logic model in the context of the theoretical underpinnings of the service delivered where applicable (e.g., theories underpinning health promotion approaches, crisis intervention etc.)</li> <li>6) Understand, identify, and articulate the assumptions underlying the program</li> <li>7) Draft a logic model</li> <li>8) Provide a written commentary of the model which accounts for assumptions, theoretical underpinnings, connections between component parts of the model</li> <li>9) Utilize logic models to facilitate evaluative thinking in programs</li> <li>10) Understand and selects various forms of logic models and other similar tools (e.g., log frames, theory of change)</li> <li>11) Evolve a logic model as a living document</li> </ol>
2.3 Determines the purpose for the evaluation	<ol style="list-style-type: none"> <li>1) Specify the evaluation questions</li> <li>2) Verify the accuracy and the appropriateness of the questions with stakeholders</li> <li>3) Clarify expectations and explore possible unintended answers</li> <li>4) Take into account values and assumptions underlying the purpose</li> <li>5) Monitor conditions that could modify the purpose on an ongoing basis</li> </ol>



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<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.	
	6) Negotiate changes as required, taking the needs of the stakeholders into account
2.4 Determines program evaluability	<ol style="list-style-type: none"><li>1) Work with stakeholders to clarify program theory, components, goals and fit with the program mandate using the existing logic model or creating a new one.</li><li>2) Assess the extent to which managers or stakeholders are likely to use evaluation findings</li><li>3) Assess stage of planning cycle in order to determine type of evaluation (process, outcome) that is best suited for the stage</li><li>4) Review sources of information (primary or secondary) available and modify or develop new data collection processes if necessary</li><li>5) Consider how far an evaluation is likely to lead to real improvements in the program and whether this is commensurate with the projected costs and efforts of conducting an evaluation</li><li>6) Provide feedback to stakeholders for program development that may be required before an effective and useful evaluation can be conducted</li></ol>
2.5 Frames evaluation questions	<ol style="list-style-type: none"><li>1) Understand the basic objectives and questions associated with various types of evaluation (e.g., process, outcome, cost-related)</li><li>2) Understand and analyze interdependencies between monitoring and evaluation</li><li>3) Consult with clients and other stakeholders:<ol style="list-style-type: none"><li>a. to develop an understanding of the evaluation needs of the client and the uses that will be made of evaluation results</li><li>b. identify questions/areas to be addressed</li></ol></li><li>4) Review program documentation to identify relevant information regarding evaluation purposes, objectives, questions, design, data collection approaches, data sources, formats for data collection, data analysis, and reporting</li><li>5) Analyze materials collected to identify:<ol style="list-style-type: none"><li>a. Purpose(s) of evaluation</li><li>b. Objective(s) of evaluation</li><li>c. Evaluation questions associated with each objective</li></ol></li><li>6) Word evaluation purposes, objectives, and associated questions in such a way that responses to the questions will ensure the client's needs and uses for the results can be addressed</li></ol>
2.6 Develops evaluation designs	<ol style="list-style-type: none"><li>1) Identify technically adequate designs, in the context of program/policy and strategic objectives, that address the evaluation questions; and investigate and document their quality</li><li>2) Differentiate process and outcome questions and establish appropriate indicators</li><li>3) Establish evaluation feasibility and appropriateness through stakeholder consultation and program documentation</li><li>4) Anticipate problems and limitations of the design</li></ol>



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<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.	
	<ol style="list-style-type: none"> <li>5) Propose innovative ideas and new solutions to problems</li> <li>6) Choose most effective and efficient design given the available resources</li> <li>7) Employ triangulation, where appropriate, by using one or more of the following:               <ol style="list-style-type: none"> <li>a. multiple methods, multiple researchers, multiple data sources, multiple theories</li> </ol> </li> </ol>
2.7 Defines evaluation methods (quantitative, qualitative or mixed)	<ol style="list-style-type: none"> <li>1) Identify combinations of methods best suited to answer the research questions, choosing from a wide range of mixed (i.e., qualitative, quantitative, etc.) methods including:               <ul style="list-style-type: none"> <li>• Quantitative: Measurement of performance indicators, surveys, quasi-experimental, etc</li> <li>• Qualitative: Interviews, focus groups, observations, participant observation, content analysis, etc.</li> </ul> </li> <li>2) Challenge conventional methodologies and develop sound alternatives</li> </ol>
2.8 Identifies data sources	<ol style="list-style-type: none"> <li>1) Identify multiple data sources</li> <li>2) Identify appropriate primary sources and relevant secondary sources</li> <li>3) Consult with stakeholders to identify appropriate sources and issues in accessing these sources, for example, interviewing the target population, viewing internal documents, open-ended questions in surveys, direct observations</li> <li>4) Determine quality and availability of the data (pilot test some of the data to anticipate cleaning issues, ensure availability, ensure completeness of fields, etc.)</li> <li>5) Anticipate and plan for probable data limitations (e.g., incompatible data sets, messy construct definitions, etc.)</li> <li>6) Identify or develop data dictionaries to operationally define constructs and establish protocols for categorizing data</li> <li>7) Identify assumptions underlying data (e.g., assuming data entries were made using consistent, clear, and coherent protocols)</li> </ol>
2.9 Develops reliable and valid measures/tools	<ol style="list-style-type: none"> <li>1) Employ sampling strategies appropriate to the research design, choosing from a wide range of strategies including:               <ul style="list-style-type: none"> <li>• Random systematic sampling, stratified sampling, proportionate stratified sampling, disproportional stratified</li> <li>• Purposeful sampling (including maximum variation, homogenous, emergent, snowball, criterion based, typical case, critical case, extreme case, theory based, purposeful random, stratified purposeful)</li> </ul> </li> <li>2) Identify and/or develop effective data collection tools, such as: questionnaires, interview guides, performance measures, standardized tests, pre and post tests, that will address the issues</li> </ol>



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<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.	
	identified in the design
2.10 Collects data	<ol style="list-style-type: none"> <li>1) Collect information with a view to accuracy, neutrality, fairness, controlling bias and facilitating participation of respondents</li> <li>2) Address quality control issues, for example, conducts observer reliability checks, or takes steps regarding missing or incomplete program records</li> <li>3) Ensure adequate adherence to established data collection protocols (e.g., audit interviews to ensure that interviewers have been adequately trained in the required interview method)</li> <li>4) Determine extent of adherence to data entry protocols (i.e., draw a sample of entries and check against protocols and raw data)</li> <li>5) Negotiate access to data collection sites/populations</li> <li>6) Supervises data collection/ fieldwork</li> </ol>
2.11 Assesses validity of data	<ol style="list-style-type: none"> <li>1) Ascertain whether or not all members of the sampling frame population (people, files, documents, locations, etc.) had an equal chance of being included in the sample, and, if there's a comparison group, ascertain whether all members of the sample had an equal chance of being allocated to the group receiving the program intervention (the observation group) and the comparison group</li> <li>2) Where such chances are unequal, describe how unequal they are, and assess how unrepresentative of the population this has made the resulting sample or how different from each other this has made the intervention group and the comparison group; and make a judgment about how critical either of these factors will be to the validity of the evaluation.</li> <li>3) Identify and describe any biases in the data collection methods: <ul style="list-style-type: none"> <li>• Sources to check for consistency and negative cases</li> <li>• Examine findings from various theoretical or stakeholder perspectives.</li> <li>• Consider investigator effects such as predisposition, insufficient training, changing views</li> </ul> </li> </ol>
2.12 Assesses reliability of data	<ol style="list-style-type: none"> <li>1) Ascertain the margin of error (confidence interval) and/or the P value of statistical calculations made with the data.</li> </ol>
2.13 Assesses trustworthiness of data	<ol style="list-style-type: none"> <li>1) Confirm accuracy of data through member checking, for example, ask participants to review transcripts.</li> <li>2) Compare data collected by multiple methods and/or from multiple sources to check for consistency and negative cases</li> <li>3) Consider investigator effects such as predisposition, insufficient training, changing views</li> </ol>
2.14 Analyzes and interprets data	<ol style="list-style-type: none"> <li>1) Assess the program's <i>relevance</i> to the funder, the program clients and other stakeholders</li> </ol>



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<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.	
	<ol style="list-style-type: none"><li>2) Identify confounding variables by identifying and describing the nature and scale of the alternative independent variables, good or bad, and demonstrate why they are attributable to the program.</li><li>3) Examine the cause-effect relationships reflected in the collected data and to estimate their impact, positive or negative.</li><li>4) Recognize the importance of confounding variables in non-randomized controlled trials.</li><li>5) Make reasoned and supportive claims about attribution</li><li>6) Analyze and interpret the data using the methods specified in the evaluation design and any others that are suitable for the collected data and the evaluation questions</li><li>7) Use qualitative analysis to provide context and perspective to quantitative findings and to develop recommendations through critical analysis of all findings</li><li>8) Examine findings from various theoretical or stakeholder perspectives</li><li>9) Identify opportunities for improvements in cost-effectiveness, program delivery and/or program design</li></ol>
2.15 Draws conclusions and makes recommendations	<ol style="list-style-type: none"><li>1) Formulate conclusions for each evaluation question using inductive reasoning including answers that are implicit in the analysis, and potential answers that are consistent with, but not necessarily implicit in, the analysis.</li><li>2) Formulate recommendations as appropriate (e.g., on the level (including zero) of funding, taking account of the relevance of the program's goals and attributable impacts, and for the purpose of improving cost-effectiveness, the program's management, methods and internal allocation of resources, etc.)</li></ol>
2.16 Reports evaluation findings and results	<ol style="list-style-type: none"><li>1) Prepare a report that includes:<ul style="list-style-type: none"><li>• the evaluation's terms of reference,</li><li>• the evaluation design, framework and its rationale,</li><li>• the departures from the design during the data gathering and analysis stages,</li><li>• the data collection and analysis methods actually used</li><li>• strengths and limitations of the design/methods, and how these might affect the interpretation of findings</li><li>• the conclusions that can be drawn from the data analysis, and</li><li>• the recommendations that can be based upon those</li></ul></li></ol>



## Competencies for Canadian Evaluation Practice

<b>2.0 Technical Practice</b> competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.	
	<p>conclusions</p> <ol style="list-style-type: none"> <li>2) Prepare clear and concise reports that address the needs of the audience</li> <li>3) Use formats (e.g. graphics, tables, quotes, etc.) and types (e.g., executive summary, technical, video, etc.) that are adapted to the needs of various stakeholders</li> </ol>
<b>3.0 Situational Practice</b> competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied.	
3.1 Respects the uniqueness of the site	<ol style="list-style-type: none"> <li>1) Assess and appreciate the characteristics and conditions of the evaluation site for the program/project evaluation</li> </ol>
3.2 Examines organizational, political, community and social contexts	<ol style="list-style-type: none"> <li>1) Assess the organizational structure and culture of the program/project</li> <li>2) Recognize and monitor the political influences that may affect the evaluation</li> <li>3) Understand and be responsive to the community in which the evaluation will occur</li> <li>4) Understand and be responsive to the social context in which the evaluation will occur</li> </ol>
3.3 Identifies impacted stakeholders	<ol style="list-style-type: none"> <li>1) Identify the key stakeholders for the evaluation</li> <li>2) Identify stakeholders impacted indirectly by the evaluation</li> </ol>
3.4 Identifies the interests of all stakeholders	<ol style="list-style-type: none"> <li>1) Identify the major interests of the key stakeholders</li> <li>2) Prioritize the interests of the key stakeholders</li> <li>3) Acknowledge and balance the interests of other stakeholders involved in or affected by the evaluation (e.g., employers, clients, etc.)</li> </ol>
3.5 Serves the information needs of intended users	<ol style="list-style-type: none"> <li>1) Assess the communication styles of the stakeholders</li> <li>2) Develop a communication plan that meets the needs of the intended users and the evaluator</li> <li>3) Develop language that is appropriate for the intended users</li> <li>4) Develop and disseminate the results of the evaluation to the intended users and to other appropriate stakeholders</li> </ol>
3.6 Attends to issues of evaluation use	<ol style="list-style-type: none"> <li>1) Discuss the results of the evaluation with the sponsor/key stakeholders</li> <li>2) Consult with the sponsor/key stakeholders for suggestions on the results of the evaluation for implementation</li> <li>3) Provide recommendations that are accurate, reasonable and implement-able</li> </ol>
3.7 Attends to issues of organizational	<ol style="list-style-type: none"> <li>1) Identify and respond to the current organizational, and</li> </ol>



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<b>3.0 Situational Practice</b> competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied.	
and environmental change	<p>environmental contexts with appropriate detail</p> <ol style="list-style-type: none"> <li>2) Monitor and respond to changing environmental and organizational contexts of programs and other initiatives evaluated</li> <li>3) Provide monitoring strategies to determine the effectiveness of organizational and environmental change</li> </ol>
3.8 Applies evaluation competencies to organization and program measurement challenges	<ol style="list-style-type: none"> <li>1) Provide advice on the design of programs, policies, initiatives or projects</li> <li>2) Provide advice on the identification and articulation of measurable results for organizations, programs, policies initiatives or projects</li> <li>3) Provide advice on ongoing monitoring of organizations, programs, policies, initiatives or projects</li> </ol>
3.9 Shares evaluation expertise	<ol style="list-style-type: none"> <li>1) Encourage evaluation capacity building</li> <li>2) Help stakeholders, clients, partners understand the purpose and value in evaluation</li> <li>3) Mentor colleagues for evaluation practice</li> <li>4) Share knowledge by presenting evaluation topics in seminars/workshops</li> <li>5) Submit evaluation articles to appropriate journals</li> </ol>

<b>4.0 Management Practice</b> competencies focus on the process of managing a project / evaluation, such as budgeting, coordinating resources and supervising.	
4.1 Defines work parameters, plans and agreements	<ol style="list-style-type: none"> <li>1) Develop a scope statement for the evaluation listing the tasks to be included in the evaluation</li> <li>2) Develop a work plan to include all phases of the evaluation including tasks, deliverables, milestones, scheduling, and resources and who is responsible for each task</li> <li>3) Attend to emerging realities of the evaluation</li> <li>4) Conduct contract negotiations between the stakeholders requesting funding for the evaluation and evaluation consultant</li> </ol>
4.2 Attends to issues of evaluation feasibility	<ol style="list-style-type: none"> <li>1) Apply the Canadian/US Joint Committee Program Evaluation Feasibility standard and the ethical guidelines of the Canadian Evaluation Society</li> <li>2) Determine if the evaluation project should not occur, or if it should not occur at the time the evaluation is requested (evaluability evaluation)</li> </ol>
4.3 Identifies required resources (human, financial and physical)	<ol style="list-style-type: none"> <li>1) Identify the human resources required to conduct the evaluation; define the role of each member of the evaluation team; and create a staffing management plan</li> <li>2) Identify and implement a financial plan, and then execute it, monitoring all aspects of the finances available for the evaluation project</li> <li>3) Identify the materials and space required, and define which</li> </ol>



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<b>4.0 Management Practice</b> competencies focus on the process of managing a project / evaluation, such as budgeting, coordinating resources and supervising.	
	project team members are suitable and available for the evaluation phases
4.4 Monitors resources (human, financial and physical)	<ol style="list-style-type: none"><li>1) Measure the evaluation team's and individual's performance</li><li>2) Determine if the projected budget is adhered to during the execution of the evaluation</li><li>3) Identify/monitor specific materials, equipment, technical resources, space, and the project team members available for the evaluation phases</li></ol>
4.5 Coordinates and supervises others	<ol style="list-style-type: none"><li>1) Integrate the evaluation team and individual's various tasks and activities to collaboratively conduct the evaluation</li><li>2) Determine the strengths for each individual on the team and maximize them for the success of the evaluation</li><li>3) Oversee the work of the evaluation team and individuals on the team</li><li>4) Provide constructive feedback</li><li>5) Train and mentor junior evaluators</li></ol>
4.6 Reports on progress and results	<ol style="list-style-type: none"><li>1) Providing progress reports at appropriate milestones during the project timeframe</li><li>2) Discuss, interpret, and provide conclusions of the results of an evaluation to provide evidence from the evaluation data</li><li>3) Write reports in language that is appropriate to the audience</li></ol>
4.7 Identifies and mitigates problems / issues	<ol style="list-style-type: none"><li>1) Identify conflict situations, causes, and problem solving strategies by the people involved</li><li>2) Identify potential problem areas, informing the stakeholders of the problem and provide remedial suggestions</li><li>3) Identify and decrease the probability and impact of negative events on the evaluation</li><li>4) Identify issues dealing with contracts and vendors as soon possible to resolve these issues</li><li>5) Analyze and articulate lessons learned and apply them to other projects</li></ol>

<b>5.0 Interpersonal Practice</b> competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.	
5.1 Uses written communication skills and technologies	<ol style="list-style-type: none"><li>1) Describe the program, its context and environment and assumption in clear and understandable language that is easily accessible to the stakeholders addressed</li><li>2) Write reports that effectively communicate the processes of the evaluation</li><li>3) Write concise summary reports for different audiences</li><li>4) Write conclusions and recommendations that can be easily understood and assimilated.</li><li>5) Communicate negative findings with a view to learning and improvement</li><li>6) Use communication technology effectively (e.g., emails, social networking tools, etc.)</li></ol>



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<b>5.0 Interpersonal Practice</b> competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.	
5.2 Uses verbal communication skills	<ol style="list-style-type: none"><li>1) Use language appropriate to the audience</li><li>2) Avoid imprecise or misleading language</li><li>3) Recognize that in oral presentations, the tone of the voice, body language and facial expressions are important</li><li>4) Encourage dialogue and feedback</li></ol>
5.3 Uses listening skills	<ol style="list-style-type: none"><li>1) Anticipate and resolve misunderstanding.</li><li>2) Understand that comprehensive listening involves the voice as well as facial and body expressions</li></ol>
5.4 Uses negotiation skills	<ol style="list-style-type: none"><li>1) Negotiate formal agreements with clearly established objectives</li><li>2) Apply standard negotiation strategies (examples: dealing with stonewalling, ambiguous conditions, the unexpected, hidden objectives, silence etc.....)</li><li>3) Seek to negotiate a win-win perspective (i.e. strategizing for benefits to both parties) that is responsive to emerging developments</li><li>4) Offer a menu of possibilities when negotiating roles and evaluation approaches</li><li>5) Point out the learning value of mixed findings</li><li>6) Clarify that data are not negotiable</li><li>7) Ensure that criteria for judgments, procedures and interpretation of findings are carefully described</li></ol>
5.5 Uses conflict resolution skills	<ol style="list-style-type: none"><li>1) Resolve personal (evaluator) conflicts of interests</li><li>2) Create an environment that values diverse perspectives</li><li>3) Limit conflicts by monitoring interplay of exchanges</li><li>4) Utilize standard problem solving strategies (examples: clarifying the problem, identifying key elements, collecting information around the problem, challenging assumptions etc.)</li></ol>
5.6 Uses facilitation skills (group work)	<ol style="list-style-type: none"><li>1) Draw on a number of facilitation techniques (role play, brainstorming, simulation, building consensus, debriefing, Delphi etc.)</li><li>2) Employ open, honest dialogue</li><li>3) Motivate others</li><li>4) Integrate diverse perspectives</li><li>5) Deal with challenging dynamics</li><li>6) Reach sustainable decisions</li></ol>
5.7 Uses interpersonal skills (individual and teams)	<ol style="list-style-type: none"><li>1) Contribute to building and working in teams:<ul style="list-style-type: none"><li>• Select members with requisite and complementary skills (or has an awareness of this process)</li><li>• Capitalize on individual differences and build interdependence</li><li>• Establish a clear purpose, roles and time-bound tasks of participants (or has an awareness of this process)</li><li>• Provide encouragement and constructive feedback to ensure that individual performance and accountability is central</li></ul></li><li>2) Cultivate a personal disposition that reflects:<ul style="list-style-type: none"><li>• Self-confidence, equilibrium and poise</li><li>• Responsive orientation towards others with a non-defensive</li></ul></li></ol>



## Competencies for Canadian Evaluation Practice

<b>5.0 Interpersonal Practice</b> competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.	
	acceptance of feedback <ul style="list-style-type: none"><li>• A service orientation and empathy towards others</li></ul>
5.8 Uses collaboration / partnering skills	<ol style="list-style-type: none"><li>1) Encourage others to work towards a common goal</li><li>2) Value open and active sharing of knowledge</li><li>3) Appreciate innovative contribution accepting the flow of the dialogue in a new direction</li><li>4) Promote shared understanding to create a participative synergy</li><li>5) Advance systems thinking and work towards mutual benefit among partners</li></ol>
5.9 Attends to issues of diversity and culture	<ol style="list-style-type: none"><li>1) Identify the needs of diverse constituents and communities including: age, sexual orientation, ethnicity, language, social class, disability, culture, gender, religious beliefs and practices, local customs, organizational cultures, academic disciplines and epistemological orientation towards evaluation methodologies and approaches</li><li>2) Display sensitivity to issues of diversity</li><li>3) Respond proactively to issues of diversity, striving to be equitable and inclusive</li></ol>
5.10 Demonstrates professional credibility	<ol style="list-style-type: none"><li>1) Comply with the Utility Standard of the JC Standards specifically U1 "Evaluator Credibility"</li><li>2) Assess the degree of fit between context and the evaluator's expertise</li><li>3) Build trust among multiple participants and audiences</li><li>4) Respond to a variety of methodological traditions, social practices and ideological orientation</li><li>5) Demonstrate substantive knowledge of the program to be evaluated</li><li>6) Help stakeholders to see themselves as program experts.</li><li>7) Demonstrate personal integrity</li><li>8) Select teams that extend the evaluator's personal credibility (or have an awareness of this process)</li><li>9) Display political astuteness and staying abreast of social forces</li><li>10) Establish functional, professional relationships with stakeholders</li><li>11) Maintain independence of thought and action</li><li>12) Provide evidence of academic and other credentials</li></ol>