



Canadian
Evaluation Society

Société canadienne
d'évaluation

Competencies for Canadian Evaluation Practice

Revised version, November 2018

Approved by CES National Board, October 19 2018

Corrected January 2019

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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.”*¹ These were developed through research, member consultation and expert validation processes conducted in 2008 and 2009. In 2017-18, the Competencies Review Working Group² updated the Competencies to respond to evolution of the field; it also took this opportunity to streamline and clarify the competency statements.

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; and
- developing RFPs, SoWs or ToRs when contracting for evaluation services.

The skills and knowledge in any profession or discipline grow and evolve 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.

¹ Stevahn, L, King, J., Ghere, G., & Minnema, J.(2005) Establishing Essential Competencies for Program Evaluators, American Journal of Evaluation, 26(1) 43-59 <http://aje.sagepub.com/cgi/content/abstract/26/1/43tlls>

² Members of the Competencies Review Working Group, 2016-18, were: Gail Barrington (Chair), Linda Lee, Marthe Hurteau, Birgitta Larsson, Mike Obrecht, Chris Frank, and Karyn Hicks.

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. Reflective Practice competencies focus on the evaluator’s 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.

2. Technical Practice competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.

3. Situational Practice competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.

4. Management Practice competencies focus on applying sound project management skills throughout the evaluation project.

5. Interpersonal Practice competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.

Competencies

The Competencies for Canadian Evaluation Practice are provided below.

1. Reflective Practice competencies focus on the evaluator's 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.

- 1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking and best practices.
- 1.2 Integrates the Canadian/US Joint Committee Program Evaluation Standards in professional practice.
- 1.3 Integrates the Canadian Evaluation Society's stated ethics in professional practice and ensures that ethical oversight is maintained throughout the evaluation.
- 1.4 Considers the well-being of human and natural systems in evaluation practice.
- 1.5 Provides an independent and balanced perspective in all aspects of the evaluation.
- 1.6 Is committed to transparency in all aspects of the evaluation.
- 1.7 Uses self-awareness and reflective thinking to continually improve practice.
- 1.8 Engages in professional networks and activities and contributes to the evaluation profession and its community of practice.

2. Technical Practice competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.

- 2.1 Clarifies the purpose and scope of the evaluation.
- 2.2 Assesses program evaluability.
- 2.3 Clarifies the program theory.
- 2.4 Frames evaluation topics and questions.
- 2.5 Develops evaluation designs.
- 2.6 Uses appropriate evaluation methods.
- 2.7 Identifies data requirements, sources, sampling, and data collection tools.
- 2.8 Collects, analyzes and interprets data using appropriate methods.
- 2.9 Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.
- 2.10 Produces complete and balanced evaluation reporting to support decision-making and learning.

3. Situational Practice competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.

- 3.1 Examines and responds to the multiple human and natural contexts within which the program is embedded.
- 3.2 Identifies stakeholders' needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity.

- 3.3 Respects all stakeholders and strives to build and maintain trusting relationships.
- 3.4 Promotes and facilitates usefulness of the evaluation process and results.
- 3.5. Monitors and responds to organizational changes and changes in the program environment during the course of the evaluation.
- 3.6 Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all.
- 3.7 Uses evaluation processes and practices that support reconciliation and build stronger relationships among Indigenous and non-Indigenous peoples.

4. Management Practice competencies focus on applying sound project management skills throughout the evaluation project.

- 4.1 Provides leadership to the evaluation project.
- 4.2 Defines work parameters, plans and agreements for the evaluation.
- 4.3 Identifies and effectively uses required human, financial, and technical resources.
- 4.4 Coordinates the work of other team members.
- 4.5 Uses group management and facilitation skills.
- 4.6 Communicates project progress to all concerned.

5. Interpersonal Practice competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.

- 5.1. Uses communication strategies appropriate to the cultural, linguistic, social, and political context.
- 5.2 Demonstrates effective and appropriate written and visual communication skills.
- 5.3 Demonstrates effective, appropriate, and respectful verbal and non-verbal communication skills.
- 5.4 Uses a variety of processes that result in mutually negotiated agreements, shared understandings and consensus building.
- 5.5 Builds partnerships within the evaluation context.

Competency Descriptors

The following descriptors of the evaluator competencies 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.

Domain 1: Reflective Practice	Competencies focus on the evaluator’s 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.
<i>Revised Competency</i>	<i>Revised Descriptors</i>
1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking and best practices.	1) Knows the foundations and development of the discipline of evaluation. 2) Knows and remains informed about existing and emerging evaluation theory, models, approaches and tools.
1.2 Integrates the Canadian/US Joint Committee Program Evaluation Standards in professional practice.	1) Incorporates in practice the five dimensions of the Standards: <ul style="list-style-type: none"> a) Utility b) Feasibility c) Propriety d) Accuracy e) Accountability. See https://evaluationcanada.ca/program-evaluation-standards 2) Recognizes that the Standards are illustrative and to be used with discernment as required in diverse contexts.

<p>Domain 1: Reflective Practice</p>	<p>Competencies focus on the evaluator’s 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.</p>
<p>1.3 Integrates the Canadian Evaluation Society's stated ethics in professional practice and ensures that ethical oversight is maintained throughout the evaluation.</p>	<p>1) Understands and adheres to Canadian Evaluation Society ethics including:</p> <ul style="list-style-type: none"> a) Competence b) Integrity c) Accountability. <p>See https://evaluationcanada.ca/ethics</p> <p>2) Also considers ethical codes and guidelines that apply to the program being evaluated.</p>
<p>1.4 Considers the well-being of human and natural systems in evaluation practice.</p>	<p>1) Understands how legislation, policies, and international conventions can impact evaluation in a specific context.</p> <p>2) Understands how public welfare and quality of life issues are embodied in a specific evaluation context.</p> <p>3) Considers human rights, economic factors, and environmental stewardship.</p> <p>4) Recognizes tensions among individual, societal, and environmental interests that may be present in a program.</p>
<p>1.5 Provides an independent and balanced perspective in all aspects of the evaluation.</p>	<p>1) Declares any conflict of interest or bias.</p> <p>2) Presents evaluation results as objectively as possible.</p> <p>3) Speaks truth to power based on evidence grounded in the evaluation.</p>
<p>1.6 Is committed to transparency in all aspects of the evaluation.</p>	<p>1) Clearly articulates and shows the purpose and method of the inquiry.</p> <p>2) Shares data and other evaluation products in ways that are appropriate and ethical.</p> <p>3) Demonstrates the relationship between findings, conclusions, and any recommendations</p>

Domain 1: Reflective Practice	Competencies focus on the evaluator’s 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.
1.7 Uses self-awareness and reflective thinking to continually improve practice.	<ol style="list-style-type: none"> 1) Recognizes and manages one’s own strengths and limitations. 2) Is aware of one’s own biases and shortcomings as an evaluation professional and actively seeks to address them. 3) Identifies areas for development and seeks relevant learning opportunities. 4) Applies learning to continually develop as an evaluator.
1.8 Engages in professional networks and activities and contributes to the evaluation profession and its community of practice.	<ol style="list-style-type: none"> 1) Is a member of a professional evaluation organization and contributes to its work. 2) Attends learning events related to evaluation theory and practice. 3) Undertakes and reflects on experiential and on-the-job learning. 4) Develops and participates in communities of practice with colleagues and peers.

Domain 2: Technical Practice	
Competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.	
<i>Revised Competency</i>	<i>Revised Descriptors</i>
2.1 Clarifies the purpose and scope of the evaluation.	<ol style="list-style-type: none"> 1) Consults with key stakeholders to identify the motivation and expectations for the evaluation. 2) Clarifies and documents the goals, objectives and expected uses of the evaluation.
2.2 Assesses program evaluability.	<ol style="list-style-type: none"> 1) Determines what can be evaluated given the length of time that the program has been in operation and the availability of data. 2) Discusses with key stakeholders what can realistically be evaluated in various time frames

Domain 2: Technical Practice	Competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
	with specified levels of effort.
2.3 Clarifies the program theory.	<ol style="list-style-type: none"> 1) Clarifies the thinking behind the program through discussion with key stakeholders and a review of program documents. 2) Facilitates on-going discussion of the program theory and develops a logic model if appropriate. 3) Identifies all stakeholder groups and external influences on intended program results. 4) Reviews relevant research and evaluations of other similar programs.
2.4 Frames evaluation topics and questions.	<ol style="list-style-type: none"> 1) Obtains agreement from key stakeholders on the broad areas of inquiry and the questions to be addressed. 2) Ensures alignment between questions and evaluation goals.
2.5 Develops evaluation designs.	<ol style="list-style-type: none"> 1) Recommends an overall design for the evaluation based on context, need, relevance, and evaluation theory. 2) Outlines the strengths and weaknesses of the recommended design for review by key stakeholders. 3) Obtains agreement from key stakeholders on an evaluation design.
2.6 Uses appropriate evaluation methods.	<ol style="list-style-type: none"> 1) Determines the appropriate methodology for answering each evaluation question, taking into consideration the cultural norms and capacities of potential informants. 2) Uses appropriate qualitative, quantitative, and mixed methods. 3) Ensures availability of the appropriate expertise to conduct each method.

Domain 2: Technical Practice	Competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
2.7 Identifies data requirements, sources, sampling, and data collection tools.	<ol style="list-style-type: none"> 1) Indicates the type of data required to answer each evaluation question, the sources of data, the sample frame and the appropriate tools bearing in mind the cultures and languages of potential informants. 2) Identifies data that will support program decision making by key stakeholders. 3) Ensures that the client and stakeholders understand the methods and tools to be used for collecting data.
2.8 Collects, analyzes and interprets data using appropriate methods.	<ol style="list-style-type: none"> 1) Collects data using culturally relevant tools as identified in the evaluation plan and following best practices. 2) Assesses the level of trustworthiness of collected qualitative data using methods that are generally accepted and culturally appropriate. 3) Assesses the validity and reliability of collected quantitative data using methods that are generally accepted and culturally appropriate. 4) Informs users concerning the quality of collected data. 5) Analyzes data and interprets it using best practices.
2.9 Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.	<ol style="list-style-type: none"> 1) Articulates responses to evaluation questions to the extent enabled by the data. 2) Establishes links between any recommendations and the evaluation findings.
2.10 Produces complete and balanced evaluation reporting to support decision-making and learning.	<ol style="list-style-type: none"> 1) Reports all substantial neutral, positive and negative findings from the evaluation. 2) Structures evaluation reporting to ensure that the client and other stakeholders have ready access to findings and lessons learned. 3) Communicates evaluation results to the client and other stakeholders in ways that can be easily understood by the target audience and the general public.

Domain 3: Situational Practice	
Competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.	
<i>Revised Competency</i>	<i>Revised Descriptors</i>
3.1 Examines and responds to the multiple human and natural contexts within which the program is embedded.	<ol style="list-style-type: none"> 1) Assesses and takes into consideration the organizational structure and culture of the program. 2) Recognizes and monitors the political influences that may affect the evaluation. 3) Is responsive to the communities in which the evaluation will occur. 4) Understands and is responsive to the social, political, and environmental context in which the evaluation will occur.
3.2 Identifies stakeholders' needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity.	<ol style="list-style-type: none"> 1) Identifies stakeholder rights, interests and needs with respect to the evaluation. 2) Recognizes the strengths that diverse stakeholders and differing views bring to the evaluation. 3) Identifies opportunities for building or enhancing stakeholder capacity to participate in evaluation and appreciate its usefulness. 4) Seeks to understand the wide range of variables affecting diversity and responds appropriately. 5) Assesses and considers the intersection of multiple factors on people's lived experiences.
3.3 Respects all stakeholders and strives to build and maintain trusting relationships.	<ol style="list-style-type: none"> 1) Acknowledges that stakeholders have different perspectives and realities. 2) Identifies and mitigates barriers to trust. 3) Strives for empathic appreciation of stakeholders' lived experiences. 4) Respects stakeholders' cultures and different ways of knowing and takes them into consideration in all phases of the evaluation.

Domain 3: Situational Practice	Competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.
3.4 Promotes and facilitates usefulness of the evaluation process and results.	<ol style="list-style-type: none"> 1) Seeks and uses opportunities to increase the benefits from the evaluation process. 2) Discusses evaluation results, their implications, and possible recommendations with the client and other stakeholders. 3) Discusses with the client and other stakeholders a plan for using evaluation results that is reasonable and feasible. 4) Incorporates a process for knowledge transfer and sharing in consultation with the client and other stakeholders.
3.5. Monitors and responds to organizational changes and changes in the program environment during the course of the evaluation.	<ol style="list-style-type: none"> 1) Monitors and responds to organizational and context changes during the course of the evaluation. 2) Recognizes the potential positive and negative impacts of the evaluation on the natural environment, organizations and individuals.
3.6 Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all.	<ol style="list-style-type: none"> 1) Encourages knowledge sharing during the development of the evaluation and throughout the evaluation process. 2) Adopts the role of listener and learner as well as provider of evaluation expertise. 3) Is open to different ways of learning, recognizing knowledge, and conceptualizing evaluation.
3.7 Uses evaluation processes and practices that support reconciliation and build stronger relationships among Indigenous and non-Indigenous peoples.	<ol style="list-style-type: none"> 1) Considers how evaluation can further self-determination for Indigenous peoples. 2) Promotes Indigenous-led evaluation and the contribution of Indigenous people to evaluation. 3) Incorporates the <i>Truth and Reconciliation Commission of Canada Calls to Action</i> when evaluating programs in relevant targeted areas. 4) Incorporates the principles of ownership, control, access and possession ensuring that the values, culture, and traditions of Indigenous communities are reflected in evaluation processes and practice. See: https://fnigc.ca/ocapr.html

Domain 4: Management Practice	
Competencies focus on applying sound project management skills throughout the evaluation project.	
<i>Revised Competency</i>	<i>Revised Descriptors</i>
4.1 Provides leadership to the evaluation project.	<ol style="list-style-type: none"> 1) Demonstrates accountability to the evaluation client and project participants. 2) Promotes teamwork and sets team goals. 3) Attends to emerging realities of the evaluation and addresses challenges. 4) Manages conflict when necessary. 5) Evaluates the overall performance of the team throughout the project.
4.2 Defines work parameters, plans and agreements for the evaluation.	<ol style="list-style-type: none"> 1) Establishes, manages or monitors contract agreements. 2) Defines work parameters within the scope of the evaluation. 3) Undertakes planning and prioritization during the project. 4) Attends to issues of evaluation feasibility, workplans and timelines.
4.3 Identifies and effectively uses required human, financial, and technical resources.	<ol style="list-style-type: none"> 1) Develops and manages evaluation budgets. 2) Assigns appropriate levels and use of staffing. 3) Demonstrates the cost-effective use of resources such as computer systems and equipment, travel budgets, overtime, and unanticipated expenses. 4) Determines the logistics of the evaluation workplan.
4.4 Coordinates the work of other team members.	<ol style="list-style-type: none"> 1) Recognizes the strengths of each team member when assigning responsibilities. 2) Delegates actions or reassigns tasks if required. 3) Seeks additional or specialized expertise when necessary. 4) Trains and mentors emerging evaluators.

Domain 4: Management Practice	Competencies focus on applying sound project management skills throughout the evaluation project.
4.5 Uses group management and facilitation skills.	<ol style="list-style-type: none"> 1) Plans and conducts meetings effectively. 2) Uses appropriate communication and facilitation skills, processes and techniques. 3) Stimulates open discussion and encourages diverse perspectives. 4) Supports consensus-building and shared decision making. 5) Records decisions and shares them with group members.
4.6 Communicates project progress to all concerned.	<ol style="list-style-type: none"> 1) Keeps the client and other stakeholders informed about progress of the evaluation. 2) Recognizes and negotiates changes in scope of the evaluation. 3) Ensures that progress reports are timely and responsive to the needs of different audiences.

Domain 5: Interpersonal Practice	Competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.
<i>Revised Competency</i>	<i>Revised Descriptors</i>
5.1. Uses communication strategies appropriate to the cultural, linguistic, social, and political context.	<ol style="list-style-type: none"> 1) Chooses and applies different communication strategies, depending on the context, to create appropriate and effective communication with stakeholders. 2) Pays attention to stakeholders’ reactions and promotes respectful communication.
5.2 Demonstrates effective and appropriate written and visual communication skills.	<ol style="list-style-type: none"> 1) Produces clear, jargon-free and grammatically correct written communication. 2) Considers the potential response of readers. 3) Produces written and visual products appropriate for the messaging and readership.

<p>Domain 5: Interpersonal Practice</p>	<p>Competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.</p>
<p>5.3 Demonstrates effective, appropriate, and respectful verbal and non-verbal communication skills.</p>	<ol style="list-style-type: none"> 1) Uses clear language appropriate to the audience. 2) Listens actively and encourages dialogue by asking relevant and clarifying questions. 3) Attends to both spoken word and body language. 4) Responds to emotional expression with empathy and respect.
<p>5.4 Uses a variety of processes that result in mutually negotiated agreements, shared understandings and consensus building.</p>	<ol style="list-style-type: none"> 1) Recognizes that conflict is a natural part of human interactions and demonstrates the ability to transform conflict into learning opportunities. 2) Uses active listening to help resolve misunderstandings or clarify meaning. 3) Uses appropriate and effective strategies to address issues that interfere with the advancement of mutual understanding.
<p>5.5 Builds partnerships within the evaluation context.</p>	<ol style="list-style-type: none"> 1) Pursues partnership opportunities within the evaluation context. 2) Identifies the contributions that all parties bring to the partnership. 3) Promotes collaboration to achieve common goals. 4) Builds shared understanding and commitment.