

Evaluator Competencies Crosswalk of Developed Competency Documents (August 2015)

In 2015 the AEA Board of Directors appointed a Task Force to develop a set of evaluator competencies for the association. The membership of the American Evaluation Association has previously endorsed three documents that have contributed to the professionalization of our field:

- The Joint Committee's **Program Evaluation Standards**, currently in their 3rd edition (2011, <http://www.jcsee.org/program-evaluation-standards-statements>)
- AEA's **Guiding Principles for Evaluators** (revised in 2004, <http://eval.org>)
- AEA's **Cultural Competence Statement** (2011, <http://eval.org>)

The proposed competencies will be the fourth such document. Working over the course of the spring and summer 2015, the Task Force reviewed existing sets of general and subject-specific competencies for program, policy, and personnel evaluation to identify foundational competencies necessary to the diverse evaluation practice of AEA members. What follows is a crosswalk of evaluator competencies

Eleven sets of competencies were included in the crosswalk (in alphabetical order):

- Competencies for Canadian Evaluation Practice, Canadian Evaluation Society (CES) (2009)
- Competencies for Development Evaluation, Evaluators, Managers, and Commissioners, International Development Evaluation Association (IDEAS) (2012)
- Core Competencies for Evaluators of the UN System, United Nations Evaluation Group (UNEG) (2008)
- Essential Competencies for Program Evaluators, Stevahn, L., King, J. A., Ghore, J., & Minnema, J. (2005)
- Evaluation Capabilities Framework, United Kingdom Evaluation Society (UKES) (2013)
- Evaluator Competencies, Aotearoa New Zealand Evaluation Association (anzea) (2011)
- Evaluator Competencies, International Board of Standards for Training, Performance and Instruction (ibstpi) (2006, 2008)
- Evaluator Competencies for Professional Development, Visitor Studies Association (VSA) (2008)
- Evaluators' Professional Learning Competency Framework, Australasian Evaluation Society (AES) (2013)
- Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators, Deutsche Gesellschaft für Evaluation (DeGeEval) (2014)
- The European Evaluation Society (EES) Evaluation Capabilities Framework, European Evaluation Society (2015)

This crosswalk errs on the side of inclusion; we elected to repeat competencies in more than one domain if including them seemed helpful.

PROFESSIONAL Domain

Source	Original competency area	Reference (if applicable)	Competency description
Visitor Studies Association (VSA) <i>Evaluator Competencies for Professional Development (2008)</i>	Knowledge of and Practices with Visitor Studies Research	C.5	The learner understands important issues surrounding the ethical treatment of respondents including IRBs, and demonstrates a history of ethical practices.
International Development Evaluation Association (IDEAS) <i>Competencies for Development Evaluation, Evaluators, Managers, and Commissioners (2012)</i>	Professional Foundations 1.0	1.1	Knows the general literature and current issues in development evaluation.
		1.2	Know and applies concepts, terms, and definitions used in development evaluation.
		1.3	Understands and applies the approaches, methods, and tools of development evaluation.
		1.4	Seeks to understand the full context of an intervention by developing, or reviewing and revising as appropriate, its theory/logic to identify implications for evaluation.
		1.6	Knows the IDEAS Code of Ethics and behaves in accord with it.
		1.7	Knows and applies other internationally recognized standards and principles for development evaluation, as well as other applicable regional, national, sub-national, and/or organizational standards and principles.
		1.8	Pursues professional evaluator networks and self-improvement.
		1.9	Seeks to develop expertise in a specialty in a specialty within development evaluation.
	Communicating Evaluation Findings 6.0	6.1	Raises awareness and use of evaluations through effective communication in each stage of the evaluation, promoting transparency of the evaluation methods, and to the extent possible, publically disseminating the evaluation findings and developing targeted presentations, as set out in a dissemination plan.
		6.2	Provides opportunity for those evaluated to review and comment on the draft evaluation and its findings, conclusions, and recommendations, and incorporates the feedback as appropriate.
	Promoting a Culture of Learning from Evaluation 7.0	7.1	Engages in reviews of completed evaluations to identify lessons learned both on the evaluation process and quality of the product.
		7.3	Champions evaluation and seeks to build the evaluation capacity of others.
		7.4	Supports forms of knowledge building such as meta-evaluation and lessons-learned systems.
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework</i>	Evaluative Attitude and Professional Practice		Competent evaluators: <ul style="list-style-type: none"> • Maintain integrity in their practice <ul style="list-style-type: none"> o Demonstrate flexibility o Know and uphold professional evaluation ethics and relevant practice standards³ o Demonstrate self-awareness (acknowledge competencies and competency gaps) o Demonstrate professional credibility, discretion and confidentiality

Source	Original competency area	Reference (if applicable)	Competency description
			<p>throughout evaluation processes</p> <ul style="list-style-type: none"> o Practice within own competence o Practice meta-evaluation, seek ways to incorporate accountability into their work • Build their professional practice <ul style="list-style-type: none"> o Seek opportunities to build their competence as evaluators o Understand and seek to build self-efficacy o Are reflective about their practice, including seeking formative feedback from clients, stakeholders and colleagues o Engage with professional evaluation communities • Build the discipline of evaluation <ul style="list-style-type: none"> o Offer formative feedback to their team and colleagues o Share ideas, skills and knowledge to build the evaluation discipline • Respect the values of others • Understand that even in groups that look or sound the same as the evaluation team, there will be cultural aspects that are different from the evaluators' own • Are sensitive to, respectful of, and compliant with cultural protocols and practices • Are self-aware <ul style="list-style-type: none"> o Acknowledge and are transparent about their influence on the evaluation process, including value positions and cultural perspectives
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework (2013)</i>	Theoretical Foundations (Evaluative Knowledge, Theory, and Reasoning)		<ul style="list-style-type: none"> • Synthesis methodologies <ul style="list-style-type: none"> o Bring together facts and values for reaching evaluative judgments • Evaluation standards and ethics, the AES Code of Ethical Conduct
Aotearoa New Zealand Evaluation Association (anzea) <i>Evaluator Competencies (2011)</i>	Contextual Analysis and Engagement		<ul style="list-style-type: none"> • Identify, understand, articulate and take account of the wider context and situation relevant to the evaluation • Provide, as an individual evaluator or to form an evaluation team that has, both credibility in that context and the range of relevant connections/relationships, knowledge, skills and experience • Engage in respectful and <i>mana</i>-enhancing relationships • Bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation
	Evaluation Project Management and Professional Evaluation Practice		<ul style="list-style-type: none"> • Subscribe to and apply the appropriate standards and ethics which inform professional evaluation practice in Aotearoa New Zealand
	Reflective Practice and Professional Development		<ul style="list-style-type: none"> • Reflect on one's own identity, evaluation practice and expertise • Assess needs for growth and engage in professional development • Contribute to the evaluation profession
European Evaluation Society (EES)	Evaluation Knowledge	1.1	Appreciates the distinctive role played by evaluation in society
		1.11	Exhibits familiarity with evaluation theories, schools and approaches

Source	Original competency area	Reference (if applicable)	Competency description
<i>The EES Evaluation Capabilities Framework (2015)</i>		1.12	Shows awareness of evaluation history and trends
		1.13	Appreciates the linkages between evaluation and the social sciences
		1.15	Aims at evaluation independence and excellences in all contexts
		1.2	Masters the antecedents of evaluation quality
		1.24	Comprehends the value of diverse evaluation approaches
	Disposition and Attitudes	3.1	Upholds ethical standards and democratic values in the conduct of evaluations
		3.2	Reaches out to clients and stakeholders
		3.3	Evinces independences of mind and appearance
		3.4	Displays self-awareness and pursues continuous professional development
United Kingdom Evaluation Society (UKES) <i>UKES Evaluation Capabilities Framework (2013)</i>	Evaluation Knowledge	1.1	Understands the social and political role of evaluation
		1.11	Awareness of the history of evaluation and its emergence as a distinct field of inquiry
		1.12	Appreciates the linkages and differences between evaluation and social research
	Professional Practice	2.1	Demonstrates ability to manage and deliver evaluations
		2.11	Ascertains the social/political context and program logic
		2.12	Conforms to relevant ethical standards and guidelines
		2.16	Reports fairly and justly to agreed audiences in the public interest
		2.2	Demonstrates interpersonal skills
		2.25	Displays impartiality in conducting and reporting evaluation
	Qualities and Dispositions	3.2	Exercises sound, rigorous and fair judgment
		3.3	Contributes to the professional evaluation community
		3.4	Displays independence of mind and integrity especially when evaluation challenged
		3.5	Upholds democratic values in conducting and reporting evaluations
		3.6	Displays self-knowledge and pursues professional development
	Deutsche Gesellschaft für Evaluation (DeGeEval) <i>Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators (2008)</i>	Evaluation Theory and History	
			Evaluation standards <ul style="list-style-type: none"> • Safeguarding of the quality of evaluation • Communication instrument • Conflict management, control of evaluations
Social and Personal Competencies			Self-management competencies <ul style="list-style-type: none"> • Motivation and working style • Clarification of terms of reference, expectations and roles
			Learning and problem solving competence <ul style="list-style-type: none"> • Reflection and focusing

Source	Original competency area	Reference (if applicable)	Competency description
United Nations Evaluation Group (UNEG) <i>Core Competencies for Evaluators of the UN System (2008)</i>	Technical/Professional	Best Practices and Lessons Learned	<ul style="list-style-type: none"> • Problem solving strategies • Forms and styles of learning
			Junior Officer <ul style="list-style-type: none"> • Learns about methodology for distilling and communicating best practices and lessons learned that are well supported by evaluation findings and conclusions and refine or add to commonly accepted lessons • With some guidance, reports on best practices and lessons learned that stem logically from evaluation findings and presents an analysis of how they can be applied to different contexts and/or sectors
			Officer <ul style="list-style-type: none"> • Understand the methodology for distilling and communicating best practices and lessons learned that are well supported by evaluation findings and conclusions and refine or add to commonly accepted lessons • With minimal guidance, reports on best practices and lessons learned that stem logically from evaluation findings and presents an analysis of how they can be applied to different contexts and/or sectors
			Intermediate Officer <ul style="list-style-type: none"> • Masters the methodology for distilling and communicating best practices and lessons learned that are well supported by evaluation findings and conclusions and refine or add to commonly accepted lessons • Independently, reports on best practices and lessons learned that stem logically from evaluation findings and presents an analysis of how they can be applied to different contexts and/or sectors • Guides junior staff in distilling, communicating and report on best practices and lessons learned
	Senior Officer <ul style="list-style-type: none"> • Masters the methodology for distilling and communicating best practices and lessons learned that are well supported by evaluation findings and conclusions and refine or add to commonly accepted lessons • Independently, reports on best practices and lessons learned that stem logically from evaluation findings and presents an analysis of how they can be applied to different contexts and/or sectors • Guides evaluation staff in distilling, communicating and reporting on best practices and lessons learned 		
Personal Attributes	Ethics	Junior Officer <ul style="list-style-type: none"> • Has an understanding of the standards of ethical conduct for evaluators, including policies on receiving and giving gifts, conflicting financial interests, outside employment and activities, misuse of position, impartiality in performing official duties and related statutory authorities • Acts with integrity and honesty in relationships with all stakeholders Officer	

Source	Original competency area	Reference (if applicable)	Competency description		
			<ul style="list-style-type: none"> Has an understanding of the standards of ethical conduct for evaluators, including policies on receiving and giving gifts, conflicting financial interests, outside employment and activities, misuse of position, impartiality in performing official duties and related statutory authorities Acts with integrity and honesty in relationships with all stakeholders 		
			Intermediate Officer	<ul style="list-style-type: none"> Has an understanding of the standards of ethical conduct for evaluators, including policies on receiving and giving gifts, conflicting financial interests, outside employment and activities, misuse of position, impartiality in performing official duties and related statutory authorities Acts with integrity and honesty in relationships with all stakeholders Can provide advice to junior officers 	
			Senior Officer	<ul style="list-style-type: none"> Has an understanding of the standards of ethical conduct for evaluators, including policies on receiving and giving gifts, conflicting financial interests, outside employment and activities, misuse of position, impartiality in performing official duties and related statutory authorities Acts with integrity and honesty in relationships with all stakeholders Provides role modeling and advice to evaluation staff 	
		Judgment	Junior Officer	<ul style="list-style-type: none"> In consultation with senior staff, exercises sound professional judgment on simple issues and evaluation matters 	
			Officer	<ul style="list-style-type: none"> In consultation with senior staff, exercises sound professional judgment on increasingly complex issues and evaluation matters 	
			Intermediate Officer	<ul style="list-style-type: none"> Exercises sound professional judgment on complex issues and evaluation matters 	
			Senior Officer	<ul style="list-style-type: none"> Exercises sound professional judgment on complex issues and evaluation matters Provides advice to evaluation staff 	
		Stevahn, L., King, J. A., Ghore, J., & Minnema, J. <i>Essential Competencies for Program Evaluators</i> (2005)	Professional Practice	1.1	Applies professional evaluation standards
				1.2	Acts ethically and strives for integrity and honesty in conducting evaluations
				1.3	Conveys personal evaluation approaches and skills to potential clients
				1.4	Respects clients, respondents, program participants, and other stakeholders
				1.5	Considers the general and public welfare in evaluation practice
1.6	Contributes to the knowledge base of evaluation				
Reflective Practice	5.1		Aware of self as an evaluator (knowledge, skills, dispositions)		
	5.2		Reflects on personal evaluation practice (competencies and areas for growth)		
	5.3		Pursues professional development in evaluation		

Source	Original competency area	Reference (if applicable)	Competency description
		5.4	Pursues professional development in relevant content areas
		5.5	Builds professional relationships to enhance evaluation practice
Canadian Evaluation Society (CES) <i>Competencies for Canadian Evaluation Practice (2009)</i>	Reflective 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.
		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 area for growth)
		1.7	Pursues professional networks and self development to enhance evaluation practice
International Board of Standards for Training, Performance and Instruction (ibstpi) <i>Evaluator Competencies (2006, 2008)</i>	Professional Foundations	1	Communicate effectively in visual, oral and written form.
		2	Establish and maintain professional credibility.
		3	Demonstrate effective interpersonal skills.
		4	Observe ethical and legal standards.
		5	Demonstrate awareness of the politics of evaluation.

METHODOLOGY Domain

Source	Original competency area	Reference (if applicable)	Competency description
Visitor Studies Association (VSA) <i>Evaluator Competencies for Professional Development (2008)</i>	Knowledge of and Practices with Visitor Studies Research	C.1	The learner understands the need for and can develop a detailed evaluation plan.
		C.2	The learner is familiar with, understands, and can select and apply appropriate research methodologies and methods.
		C.3	The learner is skilled at collecting and analyzing data.
		C.4	The learner is skilled at reporting and presenting the results of research and evaluation studies.
International Development Evaluation Association (IDEAS) <i>Competencies for Development Evaluation, Evaluators, Managers, and Commissioners (2012)</i>	Monitoring Systems 2.0	2.1	Demonstrates skills in developing and using monitoring systems and data.
	Evaluation Planning and Design 3.0	3.4	Develops, or assists in developing, the strongest feasible design to answer the evaluation questions and respond to the evaluation's purpose.
	Conducting the Evaluation 5.0	5.1	Conducts fieldwork and other reviews in accord with the design and evaluation good practice.
		5.2	Analyzes and interprets data appropriately, drawing evidence-based conclusions and making sound recommendations when warranted.
	Communication Evaluation Findings 6.0	6.1	Raises awareness and use of evaluations through effective communication in each stage of the evaluation, promoting transparency of the evaluation methods, and to the extent possible, publically disseminating the evaluation findings and developing targeted presentations, as set out in a dissemination plan.
		6.2	Provides opportunity for those evaluated to review and comment on the draft evaluation and its findings, conclusions, and recommendations, and incorporates the feedback as appropriate.
Promoting a Culture of Learning from Evaluation 7.0	7.1	Engages in reviews of completed evaluation to identify lessons learned both on the evaluation process and quality of the product.	
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework (2013)</i>	Theoretical Foundations (Evaluative Knowledge, Theory, and Reasoning)		<ul style="list-style-type: none"> • The language of evaluation <ul style="list-style-type: none"> o the terms in this section and the competencies overall • The purpose of evaluation <ul style="list-style-type: none"> o making judgments of merit, worth, and/or significance • The logic of evaluation <ul style="list-style-type: none"> o Identifying criteria of merit o Setting performance standards (thresholds) o Choosing measures, and synthesizing evaluative judgments • Evaluative actions <ul style="list-style-type: none"> o Grading, rating, scoring, ranking, apportioning, comparing, attributing o Possible side effects and side impacts • Synthesis of methodologies <ul style="list-style-type: none"> o Bring together facts and values for reaching evaluative judgments • Ethical and moral reasoning • Evaluation theories, concepts, forms and definitions • Cost analysis/value for money • Literature on evaluation issues, history and trends

Source	Original competency area	Reference (if applicable)	Competency description
	Research Methods and Systematic Inquiry		<p>o From the discipline in which we work</p> <ul style="list-style-type: none"> • Prepare a research design that provides a coherent link to the objectives of the evaluation • Identify appropriate evaluative criteria and measures likely to generate valid findings • Design appropriate sampling methods to maximize learning and avoid bias • Employ valid quantitative methods with rigor, and where possible to statistical confidence levels • Apply the most appropriate qualitative methods for the evaluation context to deepen learning and understanding • Understand the range of methods available and the most appropriate mix of methods for the evaluation • Conduct literature review that is relevant and generates the required background for the evaluation • Review the logic, coherence and relevance of the evaluand design and approach • Identify available data sources, including the scope and validity of each source • Systematically gather data and other forms of contextual evidence • Use software, internet and other technological tools to facilitate effective data collection and analysis and most efficient use of resources • Assess reliability and validity of data through use of data checks, control and comparison trials, triangulation of results and cross analyses • Systematically integrate evidence from multiple sources, identifying causal linkages, generating valid findings and noting data gaps, and limitations • Interpret data by synthesis and interrogation of findings in relation to short term results and emerging outcomes • Undertake impact assessments based on the specific program/project logic and context; verify actual and perceived impacts and likelihood of results and outcomes being sustained
Aotearoa New Zealand Evaluation Association (anzea) <i>Evaluator Competencies (2011)</i>	Contextual Analysis and Engagement		<ul style="list-style-type: none"> • Identify, understand, articulate and take account of the wider context and situation relevant to the evaluation • Provide, as an individual evaluator or to form an evaluation team that has, both credibility in that context and the range of relevant connections/relationships, knowledge, skills and experience • Engage in respectful and <i>mana</i>-enhancing relationships • Bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation
	Systematic Evaluative Inquiry		<ul style="list-style-type: none"> • Design an evaluation • Systematically gather, analyze and synthesize information • Interpret the findings, and reach valid, defensible, and transparent conclusions and/or judgments and answers to evaluation questions

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> Report evaluation findings in a variety of ways that are credible, useful and actionable for the commissioner of the evaluation and others (stakeholders) who are involved in and affected by the evaluation, answers their questions, and is clear and transparent about methodological choices and evaluative interpretations made Provide critical thinking, analytical and synthesis skills to the evaluation
European Evaluation Society (EES) <i>The EES Evaluation Capabilities Framework (2015)</i>	Evaluation Knowledge	1.1	Appreciates the distinctive role played by evaluation in society
		1.13	Appreciates the linkages between evaluation and the social sciences
		1.14	Understands program theory and its implications for evaluation
		1.2	Masters the antecedents of evaluation quality
		1.21	Uses appropriate evaluation concepts and correct evaluation terms
		1.22	Displays a capacity to identify relevant evaluation questions
		1.25	Adapts evaluation designs and methods to specific contexts
		1.3	Understands the potential and limits of evaluation instruments and tools
		1.31	Data collection and analysis
		1.32	Experimental and quasi experimental methods
		1.33	Qualitative, participatory and mixed methods
		1.34	Case studies, surveys, interviews, expert panels
		1.35	Indicators, rating and monitoring systems
		Professional Practice	2.1
2.12	Assesses the evaluation context and identifies the program logic		
2.15	Reports fairly and encourages effective use of evaluation results		
2.2	Displays interpersonal skills		
2.25	Nurtures professional relationships		
United Kingdom Evaluation Society (UKES) <i>UKES Evaluation Capabilities Framework (2013)</i>	Evaluation Knowledge	1.1	Understands the social and political role of evaluation
		1.12	Appreciates the linkages and differences between evaluation and social research
		1.13	Indicates familiarity with the use of program theory in evaluation
		1.2	Familiarity with evaluation designs and approaches
		1.21	Is familiar with a range of evaluation theories and approaches
		1.24 (1)	Know how to design an evaluation appropriate to the evaluation task
		1.3	Comprehends and makes effective use of evaluation methodologies
		1.31	Appreciates advantages and potential constraints of qualitative and quantitative methods
		1.32	Appreciates different uses of monitoring systems and indicators and their role in evaluation
		1.33	Understands participatory approaches and the contexts in which most appropriate
		1.34	Realizes which methods are appropriate for formative/summative purposes
		1.35	Comprehends that criteria for validity and reliability differ according to method
Professional Practice	2.1	Demonstrates ability to manage and deliver evaluations	

Source	Original competency area	Reference (if applicable)	Competency description
		2.13	Identifies data gathering instruments appropriate to the task
		2.14	Gathers relevant evidence, analyses and interprets in context
		2.15	Conducts robust data analysis, whether qualitative or quantitative
		2.17	Disseminates evaluation findings and promotes their use
Deutsche Gesellschaft für Evaluation (DeGeEval) <i>Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators (2008)</i>	Evaluation Theory and History		Basic principles <ul style="list-style-type: none"> • Definitions – evaluation and evaluation research • Characteristics of an evaluation • Functions of evaluations • Dimensions of evaluations
			Evaluation approaches <ul style="list-style-type: none"> • Theoretical and methodological approaches and models • Positioning and terms of reference, methodological design
	Methodological Competencies		Main principles of applied social research and test design <ul style="list-style-type: none"> • Development and operationalization of questions • Planning empirical test, selection and measurement procedures
			Data collection, formatting and interpretation. Statistical knowledge <ul style="list-style-type: none"> • Basic principles of methods of inquiry • Development of data collection instruments • Univariate frequency distributions, cross-tabulation variance analysis • Procedures for measuring relationships, significance tests
			Data analysis <ul style="list-style-type: none"> • Knowledge of the application of software packages for quantitative and qualitative data analysis • Coding and recoding • Data interpretation and reporting
United National Evaluation Group (UNEG) <i>Core Competencies for Evaluators of the UN System (2008)</i>	Technical/Professional	Evaluation Design	Junior Officer <ul style="list-style-type: none"> • Assists in the development of a well-focused Terms of Reference that includes a complete background, identifies and addresses salient issues, and identifies potential impact, with significant guidance • Learns to apply various methodologies in evaluation, such as mail and telephone surveys, record reviews, focus groups and case studies • Learns about various sampling techniques (such as random, stratified and purposive) and their applications
			Officer <ul style="list-style-type: none"> • Contributes in the development of a well-focused Terms of Reference that includes a complete background, identifies and addresses salient issues, and identifies potential impact, with moderate guidance • Has a basic understanding of various methodologies in evaluation, such as mail and telephone surveys, record reviews, focus groups and case studies • Contributes to the development of the most efficient and effective methodology for the design, with moderate guidance

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Has a basic understanding of various sampling techniques (such as random, stratified and purposive) and their applications • Contributes to the development of the most accurate sampling technique for the methodology, with moderate guidance
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Develops a well-focused Terms of Reference that includes a complete background, addresses salient issues, and identifies potential impact, with minimal guidance • Has a good understanding of various methodologies in evaluation, such as mail and telephone surveys, record reviews, focus groups and case studies • Contributes to the development of the most efficient and effective methodology for the design, with minimal guidance • Has a good understanding of various sampling techniques (such as random, stratified and purposive) and their applications • Develops the most accurate sampling technique for the methodology
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Develops well-focused Terms of Reference that includes a complete background, addresses salient issues, and identifies potential impact, with some independence • Has comprehensive understanding of various methodologies in evaluation, such as mail and telephone surveys, record reviews, focus groups and case studies • Develops the most efficient and effective methodology for the design • Has comprehensive understanding of various sampling techniques (such as random, stratified and purposive) and their applications • Develops the most accurate sampling technique for the methodology
		Data Collection	<p>Junior Officer</p> <ul style="list-style-type: none"> • Collects reliable, valid and accurate information in an objective way • Learns about the practice of basic questionnaire design, including formatting, wording, question order, and response categories • Assists in the development of questionnaires and other review instruments that will address issues identified in the design, with significant guidance • Learns to apply effective interviewing skills, such as following question, probing, remaining neutral, and getting the essential information • Conducts both telephone and in-person interviews, with some guidance • Learns how to use programme data and records • Learns how to design and conduct case studies
			<p>Officer</p> <ul style="list-style-type: none"> • Collects reliable, valid and accurate information in an objective way • Has a basic understanding of basic questionnaire design, including formatting, wording, question order, and response categories

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Assists in the development of questionnaires and other review instruments that will address issues identified in the design, with moderate guidance • Understands effective interviewing skills, such as following question, probing, remaining neutral, and getting the essential information • Conducts both telephone and in-person interviews, with minimal guidance • Uses programme data and records, with some guidance • Learns how to design and conduct case studies
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Collects reliable, valid and accurate information in an objective way • Has a good understanding of basic questionnaire design, including formatting, wording, question order, and response categories • Develops questionnaires and other review instruments that will address issues identified in the design, independently • Masters effective interviewing skills, such as following question, probing, remaining neutral, and getting the essential information • Conducts both telephone and in-person interviews, independently • Uses programme data and records, independently • Designs and conducts case studies, independently • Guides and directs junior staff in data collection
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Collects reliable, valid and accurate information in an objective way • Has a comprehensive understanding of basic questionnaire design, including formatting, wording, question order, and response categories • Develops questionnaires and other review instruments that will address issues identified in the design, independently • Masters effective interviewing skills, such as following question, probing, remaining neutral, and getting the essential information • Conducts both telephone and in-person interviews, independently • Uses programme data and records • Designs and conducts case studies • Guides and directs evaluation staff in data collection
		<p>Data Analysis</p>	<p>Junior Officer</p> <p>Quantitative Data Analysis</p> <ul style="list-style-type: none"> • Works on preparing data for analysis, such as testing for data accuracy, with moderate guidance • Learns to use an analysis plan to ensure the data analysis addresses evaluation issues • Learns the uses and limits of various methods available for quantitative analysis, including frequencies, cross tabulations, and statistical testing (such as correlation and significance testing) • Acquires the skills necessary to use various computer software packages

Source	Original competency area	Reference (if applicable)	Competency description
			<p>available for quantitative analysis, including databases, spreadsheets and statistical packages</p> <p>Qualitative Data Analysis</p> <ul style="list-style-type: none"> • Learns to apply the various methods available to analyze qualitative data (as obtained from case studies, focus groups, and direct observation), such as flow charts and matrices. Appropriately uses qualitative analysis to provide context and perspective to quantitative findings, with significant guidance • Learns the role the evaluator plays in qualitative evaluation and takes this into account in assuring consistency and reliability of data analysis • Acquires the skills necessary for coding qualitative data, including when and how to code, and how to incorporate coding into analysis <hr/> <p>Officer</p> <p>Quantitative Data Analysis</p> <ul style="list-style-type: none"> • Works on preparing data for analysis, such as testing for data accuracy, with minimal guidance • Uses an analysis plan to ensure the data analysis addresses evaluation issues, with minimal guidance • Has basic understanding of uses and limits of various methods available for quantitative analysis, including frequencies, cross tabulations, and statistical testing (such as correlation and significance testing) • Applies with some guidance the skills necessary to use various computer software packages available for quantitative analysis, including databases, spreadsheets and statistical packages <p>Qualitative Data Analysis</p> <ul style="list-style-type: none"> • Has basic knowledge of the various methods available to analyze qualitative data (as obtained from case studies, focus groups, and direct observation), such as flow charts and matrices. Appropriately uses qualitative analysis to provide context and perspective to quantitative findings, with some guidance • Understands the role of the evaluator plays in qualitative evaluations and takes this into account in assuring consistency and reliability of data analysis • Has a basic understanding of the skills necessary for coding qualitative data, including when and how to code, and how to incorporate coding into analysis <hr/> <p>Intermediate Officer</p> <p>Quantitative Data Analysis</p> <ul style="list-style-type: none"> • Works on preparing data for analysis, such as testing for data accuracy, with minimal guidance • Uses an analysis plan to ensure the data analysis addresses evaluation issues, with minimal guidance • Has good understanding of uses and limits of various methods available for

Source	Original competency area	Reference (if applicable)	Competency description
			<p>quantitative analysis, including frequencies, cross tabulations, and statistical testing (such as correlation and significance testing)</p> <ul style="list-style-type: none"> • Applies with some guidance the skills necessary to use various computer software packages available for quantitative analysis, including databases, spreadsheets and statistical packages • Learns innovative and creative analysis techniques and applies as appropriate <p>Qualitative Data Analysis</p> <ul style="list-style-type: none"> • Has good knowledge of the various methods available to analyze qualitative data (as obtained from case studies, focus groups, and direct observation), such as flow charts and matrices. Appropriately uses qualitative analysis to provide context and perspective to quantitative findings, with minimal guidance • Understands the role the evaluator plays in qualitative evaluations and takes this into account in assuring consistency and reliability of data analysis • Has mastered the skills necessary for coding qualitative data, including when and how to code, and how to incorporate coding into analysis <hr/> <p>Senior Officer</p> <p>Quantitative Data Analysis</p> <ul style="list-style-type: none"> • Works on preparing data for analysis, such as testing for data accuracy, with minimal guidance • Uses an analysis plan to ensure the data analysis addresses evaluation issues, independently • Has a comprehensive understanding of uses and limits of various methods available for quantitative analysis, including frequencies, cross tabulations, and statistical testing (such as correlation and significance testing) • Applies the skills necessary to use various computer software packages available for quantitative analysis, including databases, spreadsheets and statistical packages • Uses innovative and creative analysis techniques and applies as appropriate • Guides and directs evaluation staff in quantitative data analysis <p>Qualitative Data Analysis</p> <ul style="list-style-type: none"> • Has comprehensive knowledge of the various methods available to analyze qualitative data (as obtained from case studies, focus groups, and direct observation), such as flow charts and matrices. Appropriately uses qualitative analysis to provide context and perspective to quantitative findings as well as develop recommendations through critical analysis of such findings • Understands the role the evaluator plays in qualitative evaluations and takes this into account in assuring consistency and reliability of data analysis • Masters the skills necessary for coding qualitative data, including when and how to code, and how to incorporate coding into analysis

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Guides and directs evaluation staff in qualitative data analysis
		Reporting	<p>Junior Officer</p> <ul style="list-style-type: none"> • Conceptualizes ideas and issues during the evaluation reporting process, with significant guidance • Uses critical thinking to assist in the formulation of findings and recommendations based on the results of both qualitative and quantitative data, with significant guidance • Develops clear, concise and compelling evaluation reports for maximum impact, with significant guidance • Contributes to the development of evaluation reports that meet UNEG reporting standards
			<p>Officer</p> <ul style="list-style-type: none"> • Conceptualizes ideas and issues during the evaluation reporting process, with moderate guidance • Uses critical thinking to assist in the formulation of findings and recommendations based on the results of both qualitative and quantitative data, with moderate guidance • Develops clear, concise and compelling evaluation reports for maximum impact, with some guidance • With minimal guidance, develops evaluation reports that meet UNEG reporting standards
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Conceptualizes ideas and issues during the evaluation reporting process, with independence • Uses critical thinking to assist in the formulation of findings and recommendations based on the results of both qualitative and quantitative data, with independence • Develops clear, concise and compelling evaluation reports for maximum impact, with minimal guidance • Independently develops evaluation reports that meet UNEG reporting standards
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Conceptualizes ideas and issues during the evaluation reporting process, independently • Uses critical thinking to assist in the formulation of findings and recommendations based on the results of both qualitative and quantitative data, independently • Develops clear, concise and compelling evaluation reports for maximum impact • Independently develops evaluation reports that meet UNEG reporting standards • Guides and directs evaluation staff in reporting

Source	Original competency area	Reference (if applicable)	Competency description
Stevahn, L., King, J. A., Ghere, J., & Minnema, J. <i>Essential Competencies for Program Evaluators</i> (2005)	Systematic Inquiry	2.1	Understands the knowledge base of evaluation (terms, concepts, theories, assumptions)
		2.2	Knowledgeable about quantitative methods
		2.3	Knowledgeable about qualitative methods
		2.4	Knowledgeable about mixed methods
		2.5	Conducts literature reviews
		2.6	Specifies program theory
		2.7	Frames evaluation questions
		2.8	Develops evaluation design
		2.9	Identifies data sources
		2.10	Collects data
		2.11	Assesses validity of data
		2.12	Assesses reliability of data
		2.13	Analyzes data
		2.14	Interprets data
		2.15	Makes judgments
		2.16	Develops recommendations
		2.17	Provides rationales for decisions throughout the evaluation
		2.18	Reports evaluation procedures and results
		2.19	Notes strengths and limitations of the evaluation
		2.20	Conducts meta-evaluations
Canadian Evaluation Society (CES) <i>Competencies for Canadian Evaluation Practice</i> (2009)	Technical Practice	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)
		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		

Source	Original competency area	Reference (if applicable)	Competency description
International Board of Standards for Training, Performance and Instruction (ibstpi) <i>Evaluator Competencies</i> (2006, 2008)	Planning and Designing the Evaluation	6	Develop an effective evaluation plan.
		7	Develop a management plan for the evaluation
		8	Devise data collection strategies to support the evaluation questions and design.
		9	Pilot test the data collection instruments and procedures.
	Implementing the Evaluation Plan	10	Collect data.
		11	Analyze and interpret data.
		12	Disseminate and follow-up the findings and recommendations.

CONTEXT Domain

Source	Original competency area	Reference (if applicable)	Competency description
Visitor Studies Association (VSA) <i>Evaluator Competencies for Professional Development (2008)</i>	Principles and Practices of Visitor Studies	A.1	The learner demonstrates knowledge of the purpose of visitor studies.
		A.2	The learner demonstrates familiarity with the terminology of visitor studies.
		A.3	The learner demonstrates knowledge of major research, evaluation, and/or marketing research specializations in visitor studies and critical issues associated with that specialization.
		A.4	The learner can describe major trends in the history of visitor studies filed over the last century.
		A.5	The learner shows evidence of basic understanding of other disciplines/fields that may inform visitor studies.
		A.6	The learner demonstrates knowledge of historical and current visitor studies literature.
	Principles and Practices of Informal Learning	B.1	The learner can define informal learning, distinguish between formal and informal learning, and provide examples of informal learning settings.
		B.2	The learner can clearly describe what is meant by the visitor experience.
		B.3	The learner demonstrates use of major social science and informal learning education conceptual frameworks and models in their work.
		B.4	The learner can define outcomes and can demonstrate the distinction of cognitive, affective, and psychomotor outcomes through their work.
		B.5	The learner is knowledgeable about issues surrounding diversity and universal access in the museum field (and/or with other informal learning settings).
Business Practices, Project Planning, and Resource Management	D.4	Can the learner work with a “client” in an appropriate manner taking into account resource availability, unique needs and constraints of the client institution.	
International Development Evaluation Association (IDEAS) <i>Competencies for Development Evaluation, Evaluators, Managers, and Commissioners (2012)</i>	Evaluation Planning and Design 3.0	3.1	Undertakes appropriate up-front exploration and planning for an evaluation, including stakeholder engagement.
		3.2	Seeks to minimize the burden of evaluation through sound planning that is participatory in nature, secondary analysis of existing data sets, and joint and country-level evaluation, as appropriate.
		3.3	Ensures that evaluation planning considers potential unintended effects of interventions, both positive and negative, as well as intended effects.
	Communicating Evaluation Findings 6.0	6.1	Raises awareness and use of evaluations through effective communication in each stage of the evaluation, promoting transparency of the evaluation methods, and to the extent possible, publically disseminating the evaluation findings and developing targeted presentations, as set out in a dissemination plan.
		6.2	Provides opportunity for those evaluated to review and comment on the draft evaluation and its findings, conclusions, and recommendations, and incorporates the feedback as appropriate.

Source	Original competency area	Reference (if applicable)	Competency description
	Promoting a Culture of Learning from Evaluation 7.0	7.2	Supports follow up and tracking of progress in implementing recommendations from evaluations, as appropriate.
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework (2013)</i>	<p style="text-align: center;">Attention to Culture, Stakeholders, and Context</p>		<p>Culture</p> <ul style="list-style-type: none"> • Identify and incorporate appropriate cultural protocols for interacting with the community, including incorporating cultural expertise on the evaluation team • Apply standards in a way that is sensitive to cultural context(s) • Use culturally-appropriate methods for consultation, engagement, evaluation processes, and reporting • Seek dispensation for any departure of evaluation process from cultural norms (e.g., unable to communicate directly with cultural leaders, inability to follow cultural timeframes or procedures) • Identify stakeholders <ul style="list-style-type: none"> o Upstream: evaluation clients, donors program managers o Downstream: participants' families and communities • Negotiate with stakeholders to: <ul style="list-style-type: none"> o Identify intended and potential evaluation users o Determine what constitutes credible and valid evidence o Raise awareness of ethical practice <p>Context</p> <ul style="list-style-type: none"> • Ascertain the political, policy, community and organizational milieu for the evaluation • Understand how evaluation relates to the other functions within the context • Maintain awareness of the political implications of evaluation • Seek to understand the motivations and intentions of the evaluation client • Identify barriers and enablers that will influence the evaluation effort • Identify relationships among stakeholder groups, and power relationships in particular • Articulate how those power relationships may influence specific evaluation processes or outcomes • Identify intended and potential evaluation uses • Weave contextual understanding into analysis, synthesis, evaluative interpretation, and reporting

Source	Original competency area	Reference (if applicable)	Competency description
Aotearoa New Zealand Evaluation Association (anzea) <i>Evaluator Competencies</i> (2011)	Contextual Analysis and Engagement		<ul style="list-style-type: none"> Identify, understand, articulate and take account of the wider context and situation relevant to the evaluation Provide, as an individual evaluator or to form an evaluation team that has, both credibility in that context and the range of relevant connections/relationships, knowledge, skills and experience Engage in respectful and <i>mana</i>-enhancing relationships Bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation
European Evaluation Society (EES) <i>The EES Evaluation Capabilities Framework</i> (2015)	Evaluation Knowledge	1.2	Masters the antecedents of evaluation quality
		1.23	Knows how to engage constructively with all stakeholders
		1.25	Adapts evaluation designs and methods to specific contexts
	Professional Practice	2.1	Demonstrates capacity to manage and deliver evaluations
		2.11	Responds to legitimate stakeholders' needs and concerns
		2.12	Assesses the evaluation context and identifies the program logic
		2.14	Gathers, uses and interprets evidence with care and judgment
Dispositions and Attitudes	3.2	Reaches out to clients and stakeholders	
United Kingdom Evaluation Society (UKES) <i>UKES Evaluation Capabilities Framework</i> (2013)	Evaluation Knowledge	1.1	Understands the social and political role of evaluation
		1.14	Understands the political implications of different evaluation theories and their use
		1.2	Familiarity with evaluation designs and approaches
		1.22	Knows how to engage effectively with evaluation stakeholders
		1.23	Identifies relevant evaluation questions
	Professional Practice	1.24(2)	Takes account of the policy context in designing evaluations
		2.1	Demonstrates ability to manage and deliver evaluations
		2.11	Ascertains the social/political context and program logic
	Qualities and Dispositions	2.17	Disseminates evaluation findings and promotes their use
		3.1	Demonstrates ability to adapt to changing circumstances in a principled manner
Deutsche Gesellschaft für Evaluation (DeGeEval) <i>Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators</i> (2008)	Organization and Subject Knowledge		<p>Organizational knowledge</p> <ul style="list-style-type: none"> Concept of organization, organizing Activity vs. structure Communication and interaction <p>Legal and administrative knowledge</p> <ul style="list-style-type: none"> Introduction to law Public administration studies Business processes <p>Subject specific knowledge</p> <ul style="list-style-type: none"> Different fields of practice Specific organizational and communication knowledge

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Specific legal and public administration knowledge
United National Evaluation Group (UNEG) <i>Core Competencies for Evaluators of the UN System (2008)</i>	Knowledge of the United Nations	Knowledge of Key UN Topics (Human Rights, Gender, Environment, RBM)	Junior Officer <ul style="list-style-type: none"> • Learns about the key UN topics and their inter-relationships • Knows where to find the relevant policy and operational reference texts
			Officer <ul style="list-style-type: none"> • Knows about the key UN topics • Evaluates topics under supervision • Assists in complex topical evaluations
			Intermediate Officer <ul style="list-style-type: none"> • Has a good knowledge of the key UN topics • Evaluates key topics related activities and programmes, with minimal supervision • Assist in the evaluation of topical policies, under supervision • Provides supervision to evaluation staff in the evaluation of topic-related activities, projects and programmes
			Senior Officer <ul style="list-style-type: none"> • Has comprehensive knowledge about the key UN topics • Evaluates independently all types of topics • Participates in joint evaluations of all types of topics • Provides supervision to evaluation staff in the evaluation of all types of topics • Produces evaluation methodological guides for all types of topics
		Knowledge of Evaluation Levels	Junior Officer <ul style="list-style-type: none"> • Learns about the various levels of units of evaluation and their inter-relations • Independently evaluates discreet activities such as training course, workshops, conferences and discreet activities • Evaluates projects under supervision • Assist in the evaluation of programmes, strategies and policies
			Officer <ul style="list-style-type: none"> • Evaluates independently activities and projects of the organization • Evaluates programmes under supervision • Assists in evaluation of strategies, policies and organizations
			Intermediate Officer <ul style="list-style-type: none"> • Evaluates independently activities, projects, programmes and topics • Participates in joint evaluations of projects, programmes and topics • Evaluates strategies and organizations with minimal supervision • Assists in the evaluation of policies and organizations, under supervision • Provides supervision to evaluation staff in the evaluation of activities, projects and programmes • Produces evaluation methodological guides for activities, project and programme evaluation

Source	Original competency area	Reference (if applicable)	Competency description
	Technical/Professional	Planning for Influential Evaluations	Senior Officer <ul style="list-style-type: none"> Evaluates independently all types of evaluations Participates in joint evaluations of all types of evaluation Provides supervision to evaluation staff in the evaluation of all types of evaluation Produces evaluation methodological guides for all types of evaluation
			Junior Officer <ul style="list-style-type: none"> Identifies issues that would lead to work planning items while attending conferences or meetings with other agencies, with significant guidance Researches relevant issues and subjects of interest for potential work planning items, with moderate guidance
			Officer <ul style="list-style-type: none"> Identifies issues that would lead to work planning items while attending conferences or meetings with other agencies, with moderate guidance Researches relevant issues and subjects of interest for potential work planning items, with some guidance Contributes to work planning initiatives
			Intermediate Officer <ul style="list-style-type: none"> Identifies issues that would lead to work planning items while attending conferences or meetings with other agencies, with minimal guidance Researches relevant issues and subjects of interest for potential work planning items, independently Takes a lead in work planning initiatives With minimal supervision, performs environmental scanning and plans for future evaluation challenges and opportunities
			Senior Officer <ul style="list-style-type: none"> Identifies issues that would lead to work planning items while attending conferences or meetings with other agencies, independently Researches relevant issues and subjects of interest for potential work planning items, independently Develops and leads work planning initiatives Performs environmental scanning and plans for future evaluation challenges and opportunities
Stevahn, L., King, J. A., Ghere, J., & Minnema, J. <i>Essential Competencies for Program Evaluators</i> (2005)	Situational Analysis	3.1	Describes program
		3.2	Determines program evaluability
		3.3	Identifies the interests of relevant stakeholders
		3.4	Serves the information needs of intended users
		3.5	Addresses conflicts
		3.6	Examines the organizational context of the evaluation
		3.7	Analyzes the political considerations relevant to the evaluation
		3.8	Attends to issues of evaluation use

Source	Original competency area	Reference (if applicable)	Competency description
		3.9	Attends to issues of organizational change
		3.10	Respects the uniqueness of the evaluation site and client
		3.11	Remains open to input from others
		3.12	Modifies the study as needed
Canadian Evaluation Society (CES) <i>Competencies for Canadian Evaluation Practice (2009)</i>	Situational Practice	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
International Board of Standards for Training, Performance and Instruction (ibstpi) <i>Evaluator Competencies (2006, 2008)</i>	Professional Foundations	5	Demonstrate awareness of the politics of the evaluation

MANAGEMENT Domain

Source	Original competency area	Reference (if applicable)	Competency description
Visitor Studies Association (VSA) <i>Evaluator Competencies for Professional Development (2008)</i>	Business Practices, Project Planning, and Resource Management	D.1	Can the learner efficiently plan and schedule his/her project work?
International Development Evaluation Association (IDEAS) <i>Competencies for Development Evaluation, Evaluators, Managers, and Commissioners (2012)</i>	Evaluation Planning and Design 3.0	3.2	Seeks to minimize the burden of evaluation through sound planning that is participatory in nature, secondary analysis of existing data sets, and joint and country-level evaluation, as appropriate.
	Managing the Evaluation 4.0	4.2	Manages evaluation tasks and resources to deliver evaluation responsibilities on time and within budget and of high quality.
		4.4	Provides guidance to others within and external to the organization on development evaluation planning and design, methods, and approaches.
	Communication Evaluation Findings 6.0	6.1	Raises awareness and use of evaluations through effective communication in each stage of the evaluation, promoting transparency of the evaluation methods, and to the extent possible, publically disseminating the evaluation findings and developing targeted presentations, as set out in a dissemination plan.
6.2		Provides opportunity for those evaluated to review and comment on the draft evaluation and its findings, conclusions, and recommendations, and incorporates the feedback as appropriate.	
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework (2013)</i>	Evaluation Project Management		<ul style="list-style-type: none"> • Translate evaluation knowledge and theories into a workable plan for conducting the evaluation • Scope an evaluation plan and negotiate a contract where relevant • Define work parameters, plans and agreements • Attend to issues of evaluation feasibility • Demonstrate the capacity to innovate • Identify and manage required resources (human, expertise, financial and physical) • Select and effectively utilize evaluation tools that are appropriate and fit for purpose • Coordinate and manage cost, time, quality, stakeholder and client/sponsor management • Coordinate and supervise evaluation team members understand team dynamics and actively use this knowledge to contribute to achieving the goals of the evaluation • Employ sound facilitation and process management skills • Identify and mitigate problems/issues in constructive and useful ways • Report on progress and results
	Contextual Analysis and Engagement		<ul style="list-style-type: none"> • Identify, understand, articulate and take account of the wider context and situation relevant to the evaluation

Source	Original competency area	Reference (if applicable)	Competency description
Aotearoa New Zealand Evaluation Association (anzea) <i>Evaluator Competencies</i> (2011)			<ul style="list-style-type: none"> • Provide, as an individual evaluator or to form an evaluation team that has, both credibility in that context and the range of relevant connections/relationships, knowledge, skills and experience • Engage in respectful and <i>mana</i>-enhancing relationships • Bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation
	Evaluation Project Management and Professional Evaluation Practice		<ul style="list-style-type: none"> • Manage an evaluation project
European Evaluation Society (EES) <i>The EES Evaluation Capabilities Framework</i> (2015)	Professional Practice	2.1	Demonstrates capacity to manage and deliver evaluations
		2.13	Manages resources and skills prudently so as to achieve results
United Kingdom Evaluation Society (UKES) <i>UKES Evaluation Capabilities Framework</i> (2013)	n/a		
Deutsche Gesellschaft für Evaluation (DeGeEval) <i>Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators</i> (2008)	Methodological Competencies		Project organization <ul style="list-style-type: none"> • Time planning, implementation planning and contact • Cost planning and control • Introduction to issues of cost-benefit accounting
United National Evaluation Group (UNEG) <i>Core Competencies for Evaluators of the UN System</i> (2008)	Management Skills	Managing Evaluation Process/ Projects	Junior Officer <ul style="list-style-type: none"> • Learns the basic skills of evaluation process/project management, including developing a plan and schedule, assigning tasks, ensuring milestones are met on a timely basis, ensuring project costs are within and approved budget and ensuring evaluation objectives are adequately addressed • With some supervision, manages simple evaluation projects
			Officer <ul style="list-style-type: none"> • Masters the basic skills of evaluation process/project management, including developing a plan and schedule, assigning tasks, ensuring milestones are met on a timely basis, ensuring project costs are within and approved budget and ensuring evaluation objectives are adequately addressed • Independently manages simple evaluation projects • With minimal supervision, assumes responsibility for managing complex evaluation projects • Provides feedback to evaluation team members
			Intermediate Officer

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Masters the basic skills of evaluation process/project management, including developing a plan and schedule, assigning tasks, ensuring milestones are met on a timely basis, ensuring project costs are within and approved budget and ensuring evaluation objectives are adequately addressed • Independently assumes responsibility for managing complex evaluation projects • Provides guidance to evaluation team members
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Masters and teaches junior staff the basic skills of evaluation process/project management, including developing a plan and schedule, assigning tasks, ensuring milestones are met on a timely basis, ensuring project costs are within and approved budget and ensuring evaluation objectives are adequately addressed • Independently assumes responsibility for managing complex evaluation projects • Manages multiple, concurrent evaluation projects • Provides guidance to evaluation team members
		Team Management	<p>Junior Officer</p> <ul style="list-style-type: none"> • Works together in a professional manner with team members exhibiting patience, courtesy, and respect for others and their ideas • Communicates effectively with other within the team • Develops effective relationships within the team and office
			<p>Officer</p> <ul style="list-style-type: none"> • Works together in a professional manner with team members exhibiting patience, courtesy, and respect for others and their ideas • Communicates effectively with other within the team • Develops effective relationships within the team and office, and takes some responsibility for team management
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Works together in a professional manner with team members exhibiting patience, courtesy, and respect for others and their ideas • Communicates effectively with other within the team • Develops effective relationships within the team and office, and manages evaluation project teams
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Works together in a professional manner with team members exhibiting patience, courtesy, and respect for others and their ideas • Communicates effectively with other within the team • Develops effective relationships within the team and office, and manages evaluation teams • Support with developing the team management skills of junior staff

Source	Original competency area	Reference (if applicable)	Competency description
		Coaching and Training	Junior Officer <ul style="list-style-type: none"> • Learns the basic skills of coaching and training within the context of evaluation staff development
			Officer <ul style="list-style-type: none"> • Understands the basic skills of coaching and training within the context of evaluation staff development • Assists with recruiting skillful staff • Identifies and provides evaluation training opportunities • Coaches and trains staff on technical and interpersonal skills • Provides feedback on staff performance
			Intermediate Officer <ul style="list-style-type: none"> • Masters the basic skills of coaching and training within the context of evaluation staff development • Assists with recruiting skillful staff • Identifies and provides evaluation training opportunities • Coaches and trains staff on technical, interpersonal and management skills • Provides feedback on staff performance • Empowers staff for high performance
			Senior Officer <ul style="list-style-type: none"> • Masters the basic skills of coaching and training within the context of evaluation staff development • Assists with recruiting skillful staff • Identifies and provides evaluation training opportunities • Coaches and trains staff on technical, interpersonal and management skills • Provides feedback on staff performance • Empowers staff for high performance
		Resource Management	Junior Officer <ul style="list-style-type: none"> • Learns the basic skills of resource management, including budget formulation, execution, prudent cost controls and procurement
			Officer <ul style="list-style-type: none"> • Understands the basic skills of resource management, including budget formulation, execution, prudent cost controls and procurement • With some guidance, manages evaluation project resources
			Intermediate Officer <ul style="list-style-type: none"> • Masters the basic skills of resource management, including budget formulation, execution, prudent cost controls and procurement • Independently manages evaluation project resources
			Senior Officer <ul style="list-style-type: none"> • Masters the basic skills of resource management, including budget formulation, execution, prudent cost controls and procurement • Independently manages evaluation project resources

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> Independently manages evaluation office resources
Stevahn, L., King, J. A., Ghere, J., & Minnema, J. <i>Essential Competencies for Program Evaluators</i> (2005)	Project Management	4.1	Responds to requests for proposals
		4.2	Negotiates with clients before the evaluation begins
		4.3	Writes formal agreements
		4.4	Communicates with clients throughout the evaluation process
		4.5	Budgets and evaluation
		4.6	Justifies cost given information needs
		4.7	Identifies needed resources for evaluation, such as information, expertise, personnel, instruments
		4.8	Uses appropriate technology
		4.9	Supervises other involved in conducting the evaluation
		4.10	Trains others involved in conducting the evaluation
		4.11	Conducts the evaluation in a non-disruptive manner
		4.12	Presents work in a timely manner
Canadian Evaluation Society (CES) <i>Competencies for Canadian Evaluation Practice</i> (2005)	Management Practice	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
International Board of Standards for Training, Performance and Instruction (ibstpi) <i>Evaluator Competencies</i> (2006, 2008)	Managing the Evaluation	13	Managing the evaluation plan
		14	Work effectively with personnel and stakeholders

INTERPERSONAL Domain

Source	Original competency area	Reference (if applicable)	Competency description
Visitor Studies Association (VSA) <i>Evaluator Competencies for Professional Development (2008)</i>	Business Practice, Project Planning, and Resource Management	D.2	Has the learner participated as part of a team (lead or sole PI as well as team member acceptable) on a visitor studies project?
		D.3	The learner can demonstrate professional administrative and business writing skills.
International Development Evaluation Association (IDEAS) <i>Competencies for Development Evaluation, Evaluators, Managers, and Commissioners (2012)</i>	Professional Foundations 1.0	1.5	Displays appropriate cross-cultural competence and cultural sensitivity.
	Managing the Evaluation 4.0	4.1	Participates in the evaluation as a team member, demonstrating strong leadership and team skills.
		4.3	Builds and maintains constructive relationships with partners, evaluation commissioners, and other stakeholders.
	Communication Evaluation Findings 6.0	6.1	Raises awareness and use of evaluations through effective communication in each stage of the evaluation, promoting transparency of the evaluation methods, and to the extent possible, publically disseminating the evaluation findings and developing targeted presentations, as set out in a dissemination plan.
		6.2	Provides opportunity for those evaluated to review and comment on the draft evaluation and its findings, conclusions, and recommendations, and incorporates the feedback as appropriate.
Promoting a Culture of Learning from Evaluation 7.0	7.3	Champions evaluation and seeks to build the evaluation capacity of others.	
Australasian Evaluation Society (AES) <i>Evaluators' Professional Learning Competency Framework (2013)</i>	Interpersonal Skills		<ul style="list-style-type: none"> • Listen for and respects others' points of view • Display empathy • Have the capacity to build relationships with a range of people • Maintain an objective perspective • Use written communication skills and technologies in evaluation practice • Use verbal communication skills to engage with all evaluation stakeholders • Use non-verbal communication skills where relevant and appropriate • Attend to issues of diversity and culture throughout all communication planning and processes • Listen to build confidence and effective representation amongst evaluation participants • Negotiate to balance stakeholder views and acceptance of evaluation findings • Collaborate and partner with stakeholders to engage them in evaluation processes • Use facilitation skills (group work), interpersonal skills (individual and teams) and conflict resolution skills to elicit robust qualitative input to evaluation data
	Contextual Analysis and Engagement		<ul style="list-style-type: none"> • Identify, understand, articulate and take account of the wider context and situation relevant to the evaluation

Source	Original competency area	Reference (if applicable)	Competency description
Aotearoa New Zealand Evaluation Association (anzea) <i>Evaluator Competencies</i> (2011)			<ul style="list-style-type: none"> Provide, as an individual evaluator or to form an evaluation team that has, both credibility in that context and the range of relevant connections/relationships, knowledge, skills and experience Engage in respectful and <i>mana</i>-enhancing relationships Bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation
	Evaluation Project Management and Professional Evaluation Practice		<ul style="list-style-type: none"> Develop collaborative, co-operative and respectful relationships with those involved in and affected by the evaluation (stakeholders) and evaluation team members
European Evaluation Society (EES) <i>The EES Evaluation Capabilities Framework</i> (2015)	Evaluation Knowledge	1.2	Masters the antecedents of evaluation quality
		1.23	Knows how to engage constructively with all stakeholders
	Professional Practice	2.2	Displays interpersonal skills
		2.21	Writes fluently and communicates clearly
		2.22	Values team work and leads by example
		2.23	Uses sound negotiating conflict resolution skills
2.24	Demonstrates gender awareness and cultural sensitivity		
United Kingdom Evaluation Society (UKES) <i>UKES Evaluation Capabilities Framework</i> (2013)	Evaluation Knowledge	1.2	Familiarity with evaluation designs and approaches
		1.23	Identifies relevant evaluation questions
	Professional Practice	2.2	Demonstrates interpersonal skills
		2.21	Writes fluently and communicates clearly
		2.24	Demonstrates cultural and gender awareness
		2.26	Manages conflicts of interests and values fairly
Deutsche Gesellschaft für Evaluation (DeGeEval) <i>Recommendations on Education and Training in Evaluation – Requirement Profiles for Evaluators</i> (2008)	Social and Personal Competencies		Social competence <ul style="list-style-type: none"> Development and arrangement of contacts Adoption of perspectives and empathy Feedback and conflict management ability
			Communicative competence <ul style="list-style-type: none"> Communication theory Practice I: Listening and talking Practice II: Reading and writing
			Cooperative competence <ul style="list-style-type: none"> Presenting and moderating Negotiating Cooperation and group working
United National Evaluation Group (UNEG) <i>Core Competencies for Evaluators of the UN System</i> (2008)	Interpersonal Skills	Communication Skills (Written and Oral)	Junior Officer <ul style="list-style-type: none"> Begins to develop a clear and concise UN drafting style Writes memos and internal documents and contributes to writing designs and inspection reports, with moderate guidance Reviews documents for content and style

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Assists with formal presentations such as briefings, exit and entrance conferences, review team meetings, and professional conferences, with significant guidance • Articulates relevant subject matter in a clear and concise way • Poses basic questions and contributes information appropriately in formal settings • Effectively uses appropriate support items, including charts, graphs, audio-visual techniques, and hand-outs <p data-bbox="1079 456 1157 483">Officer</p> <ul style="list-style-type: none"> • Writes accurately in a clear and concise UN drafting style • Writes memos and internal documents and contributes to writing designs and inspection reports, with some guidance • Reviews documents for content and style • Assists with formal presentations such as briefings, exit and entrance conferences, review team meetings, and professional conferences, with moderate guidance • Articulates relevant subject matter in a clear and concise way • Poses basic questions and contributes information appropriately in formal settings • Effectively uses appropriate support items, including charts, graphs, audio-visual techniques, and hand-outs <p data-bbox="1079 873 1310 901">Intermediate Officer</p> <ul style="list-style-type: none"> • Writes accurately in a clear and concise UN drafting style • Writes memos and internal documents and contributes to writing designs and inspection reports, with minimal guidance • Reviews documents for content and style and to ensure the above standards are met • Assists with and/or conducts formal presentations such as briefings, exit and entrance conferences, review team meetings, and professional conferences, with some guidance • Articulates relevant subject matter in a clear and concise way • Poses and answers questions and contributes information appropriately in formal settings • Effectively uses appropriate support items, including charts, graphs, audio-visual techniques, and hand-outs <p data-bbox="1079 1321 1241 1349">Senior Officer</p> <ul style="list-style-type: none"> • Writes accurately in a clear and concise UN drafting style • Writes memos and internal documents and contributes to writing designs and inspection reports, independently • Reviews documents for content and style and to ensure the above standards are met

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Conducts with minimal guidance formal presentations such as briefings, exit and entrance conferences, review team meetings, and professional conferences • Articulates relevant subject matter in a clear and concise way • Poses and answers questions and contributes supporting information appropriately in formal settings • Effectively uses appropriate support items, including charts, graphs, audio-visual techniques, and hand-outs
		Cultural Sensitivity	<p>Junior Officer</p> <ul style="list-style-type: none"> • Has an understanding of and respect for differences in culture, local customs, religious beliefs and practices, personal interaction and gender roles, disability, age and ethnicity, and is mindful of potential implications of these differences when planning, carrying out and reporting on evaluations • Has an understanding of international values regarding minorities and particular groups • Articulates and takes into account the diversity of interests and values that may be related to the general and public welfare. Learns how cultural norms and undertakings are reflected in different codes of professional conduct
			<p>Officer</p> <ul style="list-style-type: none"> • Has an understanding of and respect for differences in culture, local customs, religious beliefs and practices, personal interaction and gender roles, disability, age and ethnicity, and is mindful of potential implications of these differences when planning, carrying out and reporting on evaluations • Has an understanding of international values regarding minorities and particular groups • Articulates and take into account the diversity of interests and values that may be related to the general and public welfare • Is aware of how cultural norms and undertakings are reflected in different codes of professional conduct
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Has a good understanding of and respect for differences in culture, local customs, religious beliefs and practices, personal interaction and gender roles, disability, age and ethnicity, and is mindful of potential implications of these differences when planning, carrying out and reporting on evaluations • Has a good understanding of international values regarding minorities and particular groups • Articulates and take into account the diversity of interests and values that may be related to the general and public welfare • Is aware of how cultural norms and undertakings are reflected in different codes of professional conduct
			<p>Senior Officer</p>

Source	Original competency area	Reference (if applicable)	Competency description
			<ul style="list-style-type: none"> • Has comprehensive understanding of and respect for differences in culture, local customs, religious beliefs and practices, personal interaction and gender roles, disability, age and ethnicity, and is mindful of potential implications of these differences when planning, carrying out and reporting on evaluations • Has comprehensive understanding of international values regarding minorities and particular groups • Articulates and take into account the diversity of interests and values that may be related to the general and public welfare • Is very aware of how cultural norms and undertakings are reflected in different codes of professional conduct
		Negotiation	<p>Junior Officer</p> <ul style="list-style-type: none"> • Learns how to negotiate by accurately presenting a position, listening to and seeking to understand others' perspectives, and appropriately responding to the issues involved • Negotiates within the office, such as during staff and team meetings, with moderate guidance
			<p>Officer</p> <ul style="list-style-type: none"> • Negotiates by accurately presenting a position, listening to and seeking to understand others' perspectives, and appropriately responding to the issues involved • Negotiates within the office, such as during staff and team meetings, with minimal guidance • Negotiates within agency, such as during review team meetings and workgroups, with moderate guidance
			<p>Intermediate Officer</p> <ul style="list-style-type: none"> • Skillfully negotiates by accurately presenting a position, listening to and seeking to understand others' perspectives, and appropriately responding to the issues involved • Negotiates within the office, such as during staff and team meetings, and within the agency, such as during review team meetings and workgroups, independently • Negotiates outside the agency on issues related to evaluation, such as data requests, procedural items and evaluation findings, with minimal guidance
			<p>Senior Officer</p> <ul style="list-style-type: none"> • Skillfully negotiates in increasingly complex situations by accurately presenting a position, listening to and seeking to understand others' perspectives, and appropriately responding to the issues involved • Negotiates within the office, within the UN, and externally • Negotiates in complex situations outside the agency on issues related to evaluations, such as data requests, procedural items and findings, without

Source	Original competency area	Reference (if applicable)	Competency description
			guidance
		Facilitation	Junior Officer <ul style="list-style-type: none"> • Learns how to facilitate meetings and other interactions with colleagues and peers within the same office • Learns how to facilitates meetings and other interactions with colleagues and peers in other UN offices • Learns how to facilitate meetings and other interactions with external UN partners
			Officer <ul style="list-style-type: none"> • Facilitates meetings and other interactions with colleagues and peers within the same office, with some guidance • Facilitates meetings and other interaction with colleagues and peers in other UN offices, with some guidance • Facilitates meetings and other intersections and external UN partners, with some guidance
			Intermediate Officer <ul style="list-style-type: none"> • Facilitates meetings and other interactions with colleagues and peers within the same office, independently • Facilitates meetings and other interactions with colleagues and peers in other UN offices, independently • Facilitates meetings and other interactions with external UN partners, with minimal guidance
			Senior Officer <ul style="list-style-type: none"> • Facilitates meetings and other interactions with colleagues and peers within the same office, independently • Facilitates meetings and other interactions with colleagues and peers in other UN offices, independently • Facilitates meetings and other interaction with external UN partners, independently
Stevahn, L., King, J. A., Ghere, J., & Minnema, J. <i>Essential Competencies for Program Evaluators</i> (2005)	Interpersonal Competence	6.1	Uses written communication skills
		6.2	Uses verbal/listening communication skills
		6.3	Uses negotiation skills
		6.4	Uses conflict resolution skills
		6.5	Facilitates constructive interpersonal interaction (teamwork, group facilitation, processing)
		6.6	Demonstrates cross-cultural competence
Canadian Evaluation Society (CES) <i>Competencies for Canadian Evaluation Practice</i> (2009)	Interpersonal Practice	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

Source	Original competency area	Reference (if applicable)	Competency description
		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
International Board of Standards for Training, Performance and Instruction (ibstpi) <i>Evaluator Competencies</i> (2006, 2008)	Professional Foundations	1	Communicate effectively in visual, oral and written form
		3	Demonstrate effective interpersonal skills
	Managing the Evaluation	14	Work effectively with personnel and stakeholders

References

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- The European Evaluation Society (EES) Evaluation Capabilities Framework, European Evaluation Society (2015)
http://www.europeanevaluation.org/sites/default/files/twgs/EES_EVALUATION_CAPABILITIES_FRAMEWORK.pdf