



**The competent evaluator: what should commissioners  
of evaluations be looking for?**

**Bridge COP Meeting**

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1. Defining evaluator competencies
2. Brief background of study
3. Competency domains and competency examples
4. Some questions to ponder





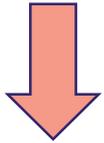
Standards define for the practitioner the acceptable characteristics of evaluation *products and services*.  
Competencies are the **skills, knowledge and abilities** required in a *person practicing evaluation*.  
Ethics provide an umbrella, under which the competencies are applied and products produced  
(The Three Pillars: Standards, Ethics and Competencies, (2008:1))



# Competency list development process



Initial list of 98 competencies



Refined to 60 competencies



Refined to 44 competencies

*Focused on context  
Decided on step-wise ranking  
process with 3 levels*

- 6 Possible domains:**
- Professional practice
  - Technical practice
  - Contextual knowledge & understanding
  - Managing an evaluation
  - Interpersonal practice
  - Monitoring

**5 Domains:**

- Managing client and stakeholder relationships
- Understanding the evaluation context
- Conducting an evaluation study
- Managing an evaluation study
- Understanding the evaluation profession and professional bodies



Refined to 53 competencies

*Feedback from SAMEA  
listserve – round 1*



Refined to 57 competencies

*Feedback from SAMEA  
listserve – round 2*

**7 Domains:**

- Added 'Professional practice'
- Split 'Understanding the evaluation context'
- Made 2 modifications to phrasing

*Continue broader  
consultation*





1. A broad 'generic' list of competencies based on review of 9 existing frameworks and feedback from SAMEA Listserve members
2. Not sector specific
3. Not field specific
4. Does not distinguish levels of expertise
5. One person is not expected to have all these competencies
6. Mostly from the perspective of an external evaluator being appointed for specific evaluation related work



# Evaluator: the superhuman?



Critical friend

Diplomat

Researcher

Detective



Advocate

Objective

Judge

Intuitive

Manager

Designer

Honest

Negotiator

Self-aware





Understands the unique circumstances and settings of evaluations and their users/stakeholders at the appropriate level (e.g. local, national, regional and/or global levels).

Has a good understanding of national M&E policies and frameworks (e.g. GWME framework)

Has sound knowledge of national development policies and principles (e.g. Ubuntu, Batho Pele, NDP, SDGs)

Has good understanding of policies, institutions, and organisations that shape the international development context in which the evaluand / organisation operates (e.g. Sustainable Development Goals, funding country legislation, rules around funding such as Official Development Assistance)





Understanding the evaluation context (organisation): Understanding the unique circumstances and settings of evaluations and their users/stakeholders at organisational level.

Has a good understanding of the philosophy and ethos of the client and/or donor/funder organisation

Has a good understanding of the M&E system within the organization

Has good subject specific content knowledge (e.g. health, education)





Interaction with the evaluation community - professional bodies and other evaluators - and knowledge of key documents e.g. standards and guidelines and ethical codes that guide evaluation practice.

Has sound knowledge of and applies key principles of professional documents (standards, ethical codes and guiding principles) in evaluation studies

Builds the capacity of others as is appropriate (e.g. participatory evaluation processes, mentoring)





Managing client and stakeholder relationship: Interpersonal skills evaluators need to engage and communicate effectively with clients, consumers and stakeholders taking into consideration their culture and their demographic attributes (e.g. race, gender, location and age)

Is politically savvy and understands the politics of development and evaluation (in all types of evaluations ranging from an evaluation for a single client or project to joint evaluations between different organisations with different cultures)

Develops collaborative and co-operative relationships with project team members (the team(s) that manages the intervention)

Is able to identify and engage all relevant stakeholders taking into account their different worldviews, norms, values and knowledge systems





Skills, knowledge and attitudes that make evaluators distinct as practicing professionals such as reflective practice, unpacking programmes theory and applying systems thinking tools.

Has sound knowledge of and can correctly use key evaluation concepts and definitions

Is able to unpack programme theory where necessary (e.g. logframe, Theory of Change)

Is able to apply systems thinking tools where necessary (e.g. outcome mapping, causal loop diagrams)



## Conducting an evaluation.



The technical aspects of inquiry such as framing questions, designing studies, sampling, collecting and analysing data, interpreting results, and reporting findings.

Is able to develop and articulate appropriate evaluation questions

Has a good understanding of different evaluation designs (e.g. experimental, quasi experimental and mixed methods)

Displays appropriate cross-cultural competence and cultural sensitivity



## Managing an evaluation.



Project management skills evaluators need to effectively negotiate, scope, manage and complete an evaluation.

Is proficient in planning evaluation studies (proper work plans, identification of milestone and deliverables)

Is able to develop and respond to Terms of Reference for evaluations

Is able to put together a culturally competent evaluation team that has the relevant knowledge, skills and experience



# Key questions that have come up

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1. Are there 'generic' competencies that would cut across sectors or fields?
2. Levels of knowledge – how much should the programmer and other roles know in comparison to the appointed evaluator? Would they have an eternal evaluator?
3. What competencies would we worry about when we consider that the programmer and other roles do not just conduct piece-meal end of project evaluations? Some get involved with design and strategy?
4. Are commissioners of evaluations clear about what they want and expect?

