

A PROFESSIONAL GROUNDING AND HISTORY OF THE DEVELOPMENT AND FORMAL USE OF EVALUATOR COMPETENCIES

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Abstract: This article provides background for the special issue. The authors first review the history of competency development in general and then in evaluation specifically. To date, the Canadian Evaluation Society and the Japanese Evaluation Society are the only professional organizations that have launched credentialing systems. However, increasing numbers of evaluation organizations and associations worldwide have developed lists of evaluator competencies, moving the field one step closer to professionalization. Although there are many viewpoints on the value of developing sets of evaluator competencies, there is currently a lack of empirical studies linking them to useful or sound evaluations.

Résumé : Cet article fournit un contexte pour le numéro spécial. Les auteurs examinent d'abord l'histoire du développement de compétences en général et ensuite spécifiquement en évaluation. À ce jour, la Société canadienne d'évaluation et la société japonaise d'évaluation sont les seules organisations professionnelles qui ont lancé des systèmes d'accréditation. Cependant, un nombre croissant d'organismes et d'associations d'évaluation à travers le monde ont développé des listes de compétences des évaluateurs, avançant le champ d'un pas de plus vers la professionnalisation. Bien qu'il existe de nombreux points de vue sur l'intérêt de développer des ensembles de compétences des évaluateurs, il y a actuellement un manque d'études empiriques qui les relient à des évaluations utiles ou efficaces.

■ The certification of evaluators has been of concern for more than thirty years in the United States (Becker & Kirkhart, 1981; Worthen, 1994, 1999) and for almost two decades in Canada

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(Love, 1994). To date, the Canadian Evaluation Society (CES) and the Japanese Evaluation Society (JES) are the only professional organizations that have launched credentialing systems. However, increasing numbers of evaluation organizations and associations worldwide, including the International Development Evaluation Association (IDEA), the United Nations Evaluation Group (UNEG), the Aotearoa New Zealand Evaluation Association (ANZEA), the European Evaluation Society (EES), and the International Board of Standards for Training, Performance, and Instruction (IBSTPI), have developed lists of evaluator competencies, moving the field of program evaluation one step closer to professionalization. While there is no dearth of viewpoints on whether or not to develop sets of evaluator competencies or on what competencies an evaluator ought to have, there has been a lack of empirical studies on these issues. In fact, to date there are no empirical studies linking sets of evaluator competencies to useful or sound evaluations.

Is evaluation already a profession? Few would question the claim that evaluation has evolved toward professional status since its inception in the 1960s (Altschuld, 1999b). But, as Jacob and Boisvert (2010, p. 350) write, “After many years of debates and numerous, often passionate, discussions, the question of whether or not evaluation is indeed a profession has not yet received a definitive answer.” Some (e.g., Davidson, 2002; American Evaluation Association, 2004; Stufflebeam & Shinkfield, 2007) label evaluation a profession; others (e.g., King, 2012) question that status and call it instead a field of practice. What does it mean to be a true profession? The development of other professions (e.g., medicine, the law) suggests that while there are unique paths of professionalization, there are also, as Table 1 details, nine common criteria for judging the status of a profession (Worthen, 1994). Almost 20 years after Worthen initially rated the professional status of evaluation, his judgement that evaluation met only six of the nine criteria essentially remains the case. Although his research was primarily situated in the United States, these results can shed light on the field of program evaluation. At the present time:

- There is a clearly demonstrated need for evaluators as programs respond to demands for improvement and accountability; job postings on websites of numerous agencies, organizations, and professional associations around the world document this need.

- Evaluation requires unique knowledge and skills, as demonstrated, for example, in the Essential Competencies for Program Evaluators (Stevahn, King, Ghere, & Minnema, 2005).
- Preparation programs for evaluators are available in a number of content areas and geographic locations (LaVelle & Donaldson, 2010).
- The number of professional associations for evaluators around the world continues to grow, and the International Organization for Cooperation in Evaluation (IOCE) supports their development (see IOCE website: <http://www.ioce.net/>).
- Relating to the expanding need for evaluation work, job opportunities for evaluators are increasingly common and evaluation careers more readily available.
- Several sets of standards for evaluation practice and other professional documents exist and are readily available (including, among others, Development Assistance Committee of the Organization for Economic Co-operation and Development, 1991; DeG Eval, 2001; American Evaluation Association, 2004; Yarbrough, Shulha, Hopson, & Caruthers, 2011; United Nations Evaluation Group, 2012; U.S. Government Accountability Office, 2011).

Table 1
Worthen's (1994) Judgements of Evaluation's Professional Status in the United States

Criteria	Satisfied?
1. A need for evaluators	Yes
2. Certification or licensure of evaluators	No
3. Exclusion of unqualified practitioners	No
4. Unique knowledge and skills of evaluation	Yes
5. Preparation programs for evaluators	Yes
6. Professional associations	Yes
7. Accreditation of preparation programs	No
8. Stable career opportunities	Yes
9. Standards of practice	Yes

Two of the remaining criteria for attaining the status of a true profession—a mechanism for the exclusion of unqualified practitioners and accreditation of preparation programs by evaluation associations—remain issues for later consideration. However, the final criterion—procedures for the certification or licensure of evaluators—has risen to the level of public discussion owing to the Canadian Evaluation Society’s development of its Credentialed Evaluator (CE) program, one of two such credentialing processes in the world sponsored by a professional association of evaluators (Buchanan & Kuji-Shikatani, this issue).

As evaluators begin to debate the merits of formal credentialing, the likelihood of a credentialing process in some countries is neither inevitable nor even likely. We believe it is important to ground this credentialing discussion in two ways: (a) in the experience and research from other fields on viable processes for developing sets of competencies, and (b) in an understanding of recent decades’ developments in the field of program evaluation. Such grounding is the purpose of this introductory article. We will begin with a definition of two key terms, followed by a discussion of approaches and processes that other fields have used to develop competencies. The next section will review roughly 30 years of competency history in North American evaluation, and the article will conclude with a discussion of implications.

DEFINITIONS AND A BRIEF HISTORY OF THE DEVELOPMENT OF COMPETENCIES

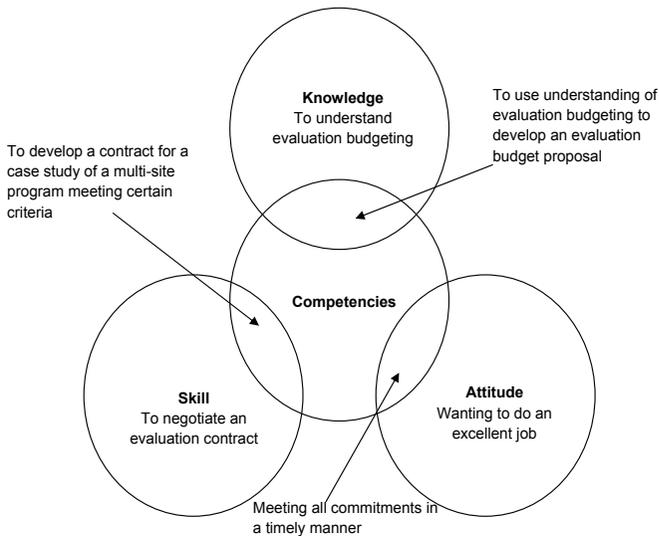
Definitions of competence and competency

In discussing how to further evaluation’s professionalization, it is first necessary to define two key terms: *competence* and *competency*. Although there is no one agreed-upon definition of competence, researchers and organizations have regularly sought to depict it. Competence is an abstract construct describing the quality of being competent. It is the “habitual and judicious use of communication, knowledge, technical skills, clinical reasoning, emotions, values, and reflection in daily practice for the benefit of the individual and community being served” (Epstein & Hundert, 2002, p. 226). A review of the literature finds that competence is often associated with knowledge, skills, or attitudes (or aptitudes or dispositions) that enable a person to effectively perform the activities of a given occupation or to function to the standards expected by a person or group (Bassellier,

Reich, & Benbasat, 2001; Bird & Osland, 2004; Connell, Sheridan, & Gardner, 2003; OECD, 2002; Roe, 2002; Salganik, 2001; Spencer & Spencer, 1993; Weinert, 2001). By contrast, a competency is a more concrete concept that includes particular knowledge, a single skill or ability, or an attitude. It speaks to the quality of being adequately or well qualified, whether physically or intellectually.

Applying this idea, evaluators can use knowledge, skills, and attitudes (by whatever name) to construct competencies for conducting evaluation. Nonetheless, only the applied knowledge, manifestation of skills that produce success, and observable behaviours related to attitudes are necessary and sufficient conditions for competencies (Schoonover Associates, 2003).¹ For example, in an evaluation setting, “to understand evaluation budgeting” is knowledge, while “to use an understanding of evaluation budgeting to develop an evaluation budget proposal” is a competency. “To negotiate an evaluation contract” is a skill, while “to develop a contract for a case study of a multisite program meeting certain criteria” is a competency. Likewise, “wanting to do an excellent job” is an attitude, while “meeting all commitments in a timely manner” is a competency. Figure 1 shows the relationship among sample competencies and the knowledge, skills, and attitudes on which they depend.

Figure 1
Relationship Between Competencies and Knowledge, Skills, and Attitudes



Adapted from “How do Competencies Differ from Skills and Knowledge?” by Schoonover Associates. Retrieved February 18, 2008, from http://www.schoonover.com/competency_faqs.htm

History of the concept of competence

In broad strokes this concept can be traced as far back as 3,000 years ago when the Chinese began to employ written civil service exams, replacing recommendations by superiors, in selection for government jobs (Hoge, Tondora, & Marrelli, 2005). In medieval times, apprenticeships were introduced, with apprentices expected to learn skills by working with a master. They were awarded credentials after they reached the standards of workmanship set by the trade (Horton, 2000). With the industrial revolution, major socioeconomic changes took place in sectors such as agriculture and manufacturing. Over time, the study of work and jobs in these and other sectors and the study of the skills needed to do these jobs emerged (Horton, 2000). Near the beginning of the 20th century, social efficiency became a dominant idea in the United States. Frederick Winslow Taylor (1911) proposed greater division of labour, with simplification of jobs, an extension of managerial control over all elements of the workplace, and cost accounting based on systematic time-and-motion study. All of these elements were associated with the rise of the concept of competence.

In management, the concept continued to develop with a focus on work and employee selection (Hoge et al., 2005). In the 1940s and 1950s, researchers started systematically identifying and analyzing broad performance factors (see Fleishman, 1953; Flanagan, 1954). Beginning in the 1960s, many psychologists researched individual variables that would effectively predict job performance without inherent bias against subgroups (Shippmann et al., 2000). Not only did the competence movement shape the industrial and business sectors in terms of efficiency, it also reformed the field of education with the advent of competency-based education, which was linked to industrial and business models centred on specification of outcomes in the form of behavioural objectives (Tuxworth, 1989).

Competency-based teacher education brought curriculum reform in the mid and late 1960s. In 1968, the U.S. Office of Education funded 10 studies to develop model training programs for the preparation of elementary school teachers, all of which focused on teacher competencies by implementing planning and monitoring systems (Johnson, 1984; Tuxworth, 1989). Eventually, teacher accreditation systems were established throughout the country with minimum standards of performance and minimum levels of competence (Horton, 2000). The impact of competency-based education and training reached various

professions in the United States. For example, health-related professions, such as medicine, nursing, and personal care assistance, became well known for adopting competency-based notions for both initial training and continuing professional development. In addition, occupational certification and licensing emerged with the development of competencies in many professions, using sophisticated tests assessing knowledge directly related to specified competencies (Tuxworth, 1989).

APPROACHES TO COMPETENCE AND METHODS FOR DEVELOPING SETS OF COMPETENCIES

Because the purpose of this article is to ground evaluator competencies in the broader realm of competency development, a brief review of competence approaches and methods for creating competencies is in order. In the evolution of competence, three main schools of research and practice have been influential: (a) the differential-psychology approach, (b) the educational-and-behavioural psychology approach, and (c) the management-sciences approach (McLagan, 1997).

Differential-psychology approach. “This approach focuses on human differences, especially abilities that are hard to develop . . . [T]hey emphasize intelligence, cognitive and physical abilities, values, personality traits, motives, interests, and emotional qualities” (McLagan, 1997, p. 46). Under the differential-psychology framework, competencies are defined as underlying characteristics of people that are causally related to effective or superior performance in a job (Boyatzis, 1982). The use of this definition requires “inputs of individuals” in order for them to achieve competent performances (Hoffmann, 1999). The “inputs of individuals” are “underlying characteristics of people” as described in Boyatzis’s definition and include people’s intelligence, personality traits, and knowledge and skills that they use. A common application of competencies with the differential-psychology framework is to single out qualities that superior performances have (McLagan, 1997). Furthermore, employers can use such competencies to identify employees with high potential for leadership positions (Hoge et al., 2005). Applying this approach to the field of program evaluation would require determining the essential characteristics of high quality or high performing evaluators, which would then help to set standards of competence.

Educational and behavioural psychology approach. This framework focuses on specifying the full range of competencies required for successful job performance. It emphasizes developing people so that

they can be successful (Hoge et al., 2005). People who apply the educational-and-behavioural approach tend to understand well the “conscious competence learning matrix,” which is used to explain the psychological stages of learning new skills and techniques.² Howell (1982) describes these four stages:

Unconscious incompetence—this is the stage where you are not even aware that you do not have a particular competence. Conscious incompetence—this is when you know that you want to learn how to do something but you are incompetent at doing it. Conscious competence—this is when you can achieve this particular task but you are very conscious about everything you do. Unconscious competence—this is when you finally master it and you do not even think about what you have [done] such as when you have learned to ride a bike very successfully. (pp. 29–33)

Important applications of competencies in the educational-and-behavioural psychology framework are identifying competencies that employees need to become effective workers and creating performance management, training, and other development programs to help them move along the pathway from “unconscious incompetence” to “unconscious competence.” In the field of evaluation, applying an education-and-behavioural psychology approach would require identifying the multiple behaviours of competent evaluators, then developing training programs to teach novices.

Management sciences approach. This approach places emphasis on the job rather than on the employee. The identification of competencies usually starts with job analysis and ends with a list of knowledge, skills, attitudes, and personal characteristics. As a result, job descriptions are developed as well as job evaluation criteria (McLagan, 1997). In addition, “job evaluation consultants, HRD administrators and compensation specialists, reengineering and total-quality experts, and task analysts are the major purveyors of this approach” (McLagan, 1997, p. 46). The common application of competencies using the management-science framework can be found in employee selection processes, in which competencies are identified to be included in job interviews and written tests (Hoge et al., 2005). Although difficult to implement in practice, it is easy to see how such an approach could be used in developing evaluator job descriptions (i.e., a list of required skills and attributes).

These three approaches serve as frameworks for the research and application of the concept of competence and provide three ways to perceive competence as an abstract construct. The differential-psychology approach emphasizes the abilities of individuals; the educational-and-behavioural approach emphasizes the developmental characteristics of competence; the management-sciences approach emphasizes job analysis rather than people.

What about the research base that accompanies the development of competencies, whatever approach was used? Empirical research on competencies began with job analysis in the 1940s and 1950s. Job analysis is a set of procedures designed to identify and describe those aspects of performance that differentiate high performers from low performers (Anastasi & Urbina, 1997). In the demand for innovative techniques in job analysis, Fleishman (1953) and Flanagan (1954) systematically analyzed supervisor job behaviour and identified broad performance factors (Shippmann et al., 2000).

Fleishman's study (1953) focused on developing a method of describing leadership behaviour so that different leadership patterns could be related to criteria of effectiveness in various working situations in which leaders function. At the same time, Flanagan (1954) pioneered the classic *critical incident technique* (Shippmann et al., 2000). Using this technique, an incident meant any observable human activity that lent itself to inferences about the person conducting the act. To be critical, the incident had to reveal itself with clear purpose to the observer and leave little doubt concerning its effects. The critical incident technique includes five steps: (a) determination of the general aim of the activity, (b) development of plans and specifications for collecting factual incidents regarding the activity, (c) collection of the data, (d) analysis of the data, and (e) interpretation and reporting of the statement of the requirements of the activity. Rather than collecting opinions, hunches, and estimates, the essence of this technique is to obtain a record of specific behaviours that make a significant contribution to the activity.

In 1973, McClelland (1973) published a seminal article entitled "Testing for Competence Rather than for Intelligence," asserting that the traditional academic aptitude and knowledge content tests, as well as school grades and credentials, did not predict job performance or success in life. In addition, those intelligence tests were often biased against minorities, women, and persons from lower socioeconomic strata (McClelland, 1973; Shippmann et al., 2000; Spencer & Spen-

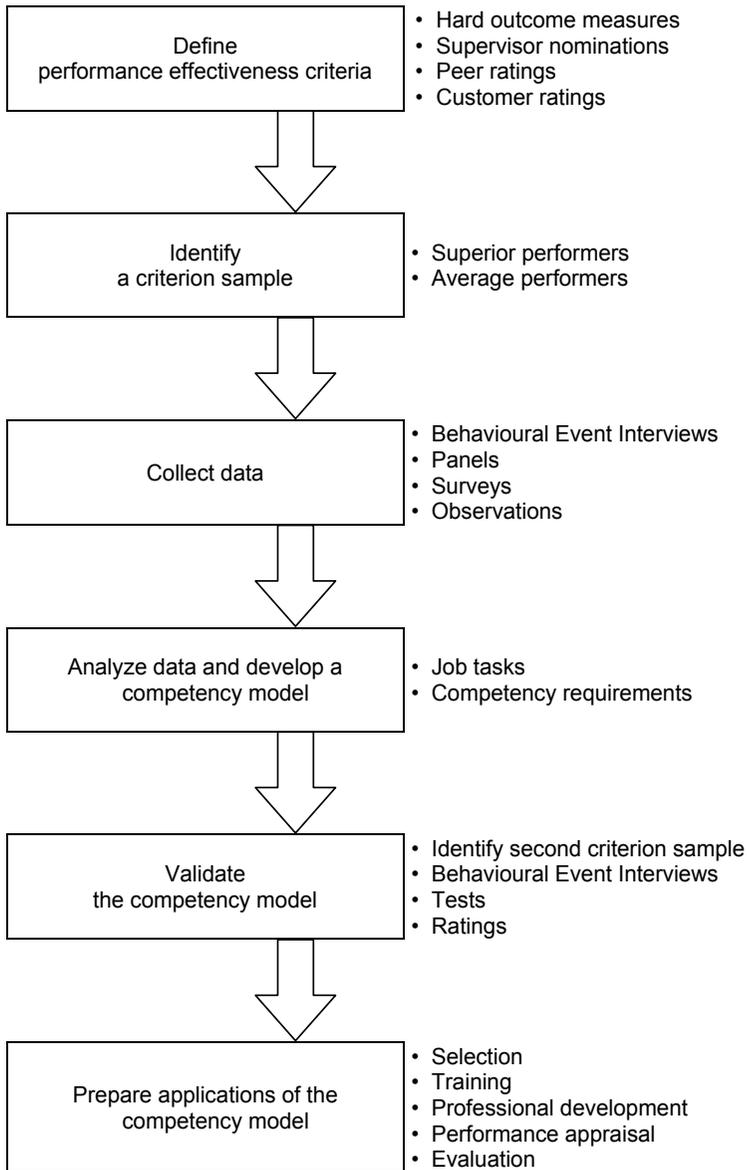
cer, 1993). Instead, McClelland promoted the use of competency, which, he believed, would predict job performance and was not biased by race, sex, or socioeconomic factors (McClelland, 1973). He developed a technique called the *Behavioural Event Interview* (BEI), which grew out of Flanagan's critical incident method. However, the difference between the two is that Flanagan was interested in "identifying the task elements of jobs," while McClelland was interested in the "characteristics of the people who did a job well" (McClelland, 1993, p. 5). McClelland argues, cited in Spencer and Spencer, that in competency testing, "what people think or say about their motives or skills is not credible . . . Only what they actually do, in the most critical incidents they have faced, is to be believed" (Spencer & Spencer, 1993, p. 115). Therefore, the BEI method is designed to find out what people actually do rather than what they say.

Spencer and Spencer (1993), in summarizing 20 years of research on competency modelling, reviewed findings from 286 studies of entrepreneurial, technical and professional, sales, government, military, health care, education, and religious organizations and identified three alternative methods for the design of competency studies: (a) the classic study design (i.e., critical incident method or the behavioural event interview) using criterion samples, (b) a short study design using expert panels, and (c) studies of single incumbent and future jobs where there are not enough jobholders to offer samples of superior and average performance (p. 93). They detailed the six steps to conduct a classic competency study as shown in Figure 2. Taken together, then, the three approaches to studying competence and the three methods for developing competencies, summarized in Spencer and Spencer (1993) and still viable today, suggest numerous possibilities for a field new to the development of professional competencies. Having reviewed definitions of competence and competency as well as different approaches for developing competencies in general, we now turn to the field of evaluation to review its development of competencies.

STEPS IN THE DEVELOPMENT AND FORMAL USE OF EVALUATOR COMPETENCIES

As noted above, the emerging profession of program evaluation has debated the possibilities of general evaluator competence/competencies for more than three decades. In the ensuing discussion, several prominent theorists put forward thoughts on competencies for the field. For example, Kirkhart (1981) and Mertens (1994) reflected on evaluation practice and organized the skills and knowledge of

Figure 2
Classic competency study design



Modified by the authors from "Competence at Work: Models for Superior Performance," by L. M. Spencer & S. M. Spencer, 1993, New York: Wiley.

program evaluation into conceptual frameworks. Kirkhart identified eight major descriptive categories of evaluator competencies: (a) methodological skills, (b) knowledge areas providing substantive background, (c) systems analysis skills, (d) political savvy and understanding, (e) professional ethics, (f) management skills, (g) communication skills, and (h) interpersonal skills or character traits (1981, pp. 188–189). Mertens divided those skills and knowledge into four categories: (a) those unique to evaluation, (b) those associated with typical training in the methodology of research and inquiry, (c) those in such related areas as political science or anthropology, and (d) those that are discipline-specific (1994, p. 19).

Patton (1990) and Scriven (1996) each informally identified lists of competencies for evaluators. Delivering the keynote address for the Australasian Evaluation Society regarding the challenge of program evaluation becoming a profession, Patton proposed that a competent evaluator should possess multiple and diverse methods, communication skills, conceptualization and program logic capabilities, consulting skills, interpersonal competence, political sophistication, knowledge of how organizations work, creativity, and verbal and written presentation skills (1990, p. 48). Scriven challenged evaluators to have “reasonable competence” at being able to understand and apply basic qualitative and quantitative methodologies, validity theory, generalizability theory, meta-analysis, legal constraints on data control and access, ethical analysis, needs assessment, cost analysis, internal synthesis models and skills, conceptual geography, and evaluation-specific report design, construction, and presentation (1996, p. 160).

In addition to the thoughts of individual experts, the 1990s saw competency-related developments in both Canadian and American evaluation circles. In that decade the Canadian Evaluation Society charged its Professional Development Committee with promoting the professional practice of evaluation. As a result, building on an original series developed by the Ontario chapter of CES, the national Essential Skills Series in Evaluation (ESS) was created in 1999. ESS is a four-day series of workshops guided by an experienced evaluator that introduces evaluation concepts and methods including (a) understanding program evaluation, (b) building an evaluation framework, (c) improving program performance, and (d) evaluating for results (Canadian Evaluation Society, 2004). ESS serves as an overview of essential competencies required in mainstream views of program evaluation.

Table 2
Definitions of Certification, Credentialing, Licensure, and Accreditation

Terms	Definition	Description
Certification	A process by which a person masters certain skills and competencies in a field as assessed by an external body (usually a professional society in the area of consideration).	<ul style="list-style-type: none"> • Most often done through a formal test or set of tests (certification exams) as in law, medicine, engineering, etc. • Certifying body may be legally liable for the skills that they designate as being attained by an individual • Certification may have to be periodically renewed most frequently (but not always) via continuing education
Credentialing	A set of courses or other experiences a person must go through to receive a credential. May be done by a professional society or sometimes by trainers as in a credential for having been trained.	<ul style="list-style-type: none"> • Does not specify the skill set attained by the person credentialled, only that they have gone through delineated experiences and courses • Tests or certification exams may be, but generally are not, used for credentialing; instead it is the courses or training experiences that the individual has taken • The legal implications for credentialing are less than for certification
Licensure	Licenses are awarded by states, branches of government, and legal jurisdictions. One must have a license to perform services or undergo penalties if they are performed without a license. Many times the criteria for licensing are the same as certification and are determined by professional societies/groups.	<ul style="list-style-type: none"> • One may be certified but not licensed as in the case of a physician who has passed the necessary medical examinations but is found to have defrauded patients or illegally used drugs • Legal jurisdictions set up review panels in cases where there is malfeasance or unsafe practice • Control of licensure resides outside of the professional group but is almost always highly influenced by it
Accreditation	A mechanism whereby the educational program of an agency or educational institution is examined, by an external panel against established criteria for programs. The program, if it passes review, receives a formal document indicating that it is accredited.	<ul style="list-style-type: none"> • Accreditation is for a program whereas certification, credentialing, and licensure relate to an individual • Accreditation reviews rely on the courses and experiences that comprise a program, the skills gained by those going through it, their proficiencies as determined by tests and other outcome measures, and the processes through which the program is delivered

Note. From "Certification, Credentialing, Licensure, Competencies, and the Like: Issues Confronting the Field of Evaluation," by J. W. Altschuld (2005), *Canadian Journal of Program Evaluation*, 20(2), 157–168.

CES was not alone in seeking to promote professional practice. In the late 1990s American Evaluation Association (AEA) President Len Bickman appointed a group to study the possibilities of certification or other forms of credentialing of evaluators, which led to serious discussion of how AEA might proceed (Altschuld, 1999b). Altschuld (1999a, 1999b) and Smith (1999) were two participants in this discussion. Altschuld acknowledged that credentialing is “a partial first step toward establishing some boundaries for the field of evaluation” (1999a, p. 510). He defined credentialing as “the fact that a person has studied a field and completed specified courses and activities in that field” (Altschuld, 1999a, pp. 507–508), which is different from certification that indicates “the individual has attained a certain level of knowledge and skills in a field, usually as determined through an examination or a series of examinations” (Altschuld, 1999a, p. 508). To clarify potential confusion among terms, Altschuld (2005) provided definitions and descriptions for each of them (see Table 2).

Smith (1999) suggested three options for developing evaluator competencies in the context of evaluator certification: (a) a self-generated list of competencies by professional evaluators, (b) a job analysis approach based on the input from evaluation recipients, and (c) identifying evaluator competencies according to the AEA’s *Guiding Principles for Evaluators* (2004). She clearly stated that all three options have limitations. She argued that the self-generated list would be “self-serving,” not user-sensitive, and lacking an empirical basis; the job analysis approach would be costly; and the *Guiding Principles* were too general to apply (M. F. Smith, 1999, pp. 525–526). Although the AEA hotly debated the issue of certification, it has never endorsed or adopted competencies for evaluators. Rather, it has limited itself to date to developing guiding principles for evaluators, without identifying specific competencies for enacting those principles.

As noted above, to date there has been a noticeable lack of empirical studies on these issues. Unlike the extensive research on competencies conducted in management, the research on evaluator competencies is scarce, and most research on evaluator competencies is theoretical in nature. Although several frameworks identifying evaluator competencies have been proposed, none of these frameworks “have been derived from a systematic process or validated by empirical consensus building among diverse professionals in the field” (King, Stevahn, Ghery, & Minnema, 2001, p. 230). In addition, with the possible exception of an evaluator’s ability to involve participants (see Johnson et al., 2009), the relation between any set

of competencies and the use of a given evaluator's evaluations also remain undocumented.

It was not until the new millennium that three projects were conducted to develop inventories and descriptions of competencies for evaluators (Huse & McDavid, 2006). One of the projects was conducted independently by a group of university researchers in the United States to develop essential competencies for program evaluators (ECPE; hereafter called the ECPE project). The second was a certification program for professional evaluators developed by the Japanese Evaluation Society. The third was sponsored by the Canadian Evaluation Society (hereafter called the Canadian project).

ECPE project. In the United States, King led the ECPE project, which was neither funded nor sponsored by the American Evaluation Association (King et al., 2001). The Essential Competencies for Program Evaluators began as an exercise in a graduate-level evaluation studies colloquium. A face validation study was then performed with evaluators in Minnesota using a Multi-Attribute Consensus Reaching (MACR) procedure (Stevahn et al., 2005). As a result, the Essential Competencies for Program Evaluators were established, including 61 items in six categories: professional practice, systematic inquiry, situational analysis, project management, reflective practice, and interpersonal competence. The taxonomy of essential evaluator competencies outlined the capabilities an evaluator needs to conduct effective evaluation practice.

The same group of researchers (Stevahn et al., 2005) further refined the evaluator competencies and cross-referenced them to the *Program Evaluation Standards* (Joint Committee on Standards for Educational Evaluation, 1994) and the *Guiding Principles* (American Evaluation Association Task Force on Guiding Principles for Evaluators, 1995) as well as to the *Essential Skills Series* (Canadian Evaluation Society, 1999). Ghere, King, Stevahn, and Minnema (2006) turned the essential competencies into a self-assessment instrument with which evaluators could reflect on their evaluation practice (available at <http://evaluation.umn.edu/>). These competencies were intended to improve training, enhance reflective practice, promote evaluation research, and continue professionalization of the field of evaluation (Stevahn et al., 2005).

Recently, Wilcox (2012) initially validated the ECPE applying Messick's (1989, 1995a, 1995b) concept of unitary validity as a

framework, using a web-based survey and a series of interviews. The survey gathered information on the extent to which respondents believed that program evaluators need to be able to demonstrate the essential competencies for program evaluators, whether or not they do so regularly. The survey was sent to a sample of 208 evaluators in Minnesota through the Minnesota Evaluation Association electronic discussion list, and 102 (49%) responded. Fifty-eight out of the 61 competencies were considered “strongly necessary” or more, and the remaining three competencies were viewed as “moderately necessary.” None of the competencies were, on average, rated as “not at all necessary” or “slightly necessary.”

The interview results revealed that professional practice and interpersonal competence were considered critical by all. Although evaluators were reportedly rarely proficient in all systematic inquiry competencies, they reportedly were most likely to collaborate on these evaluation functions. Evaluators who worked in different fields or served in different roles reported variations in the extent to which they conducted situational analysis and project management. All interviewees thought highly of reflective practice, but acknowledged that they could do better in this area. Almost all reported they did not do meta-evaluation. Almost all interviewees had mixed feelings about certification and/or credentialing. On the one hand, all interviewees agreed that certification and/or credentialing would potentially extend benefits to their clients; on the other, some interviewees expressed reservations about possible exclusivity, cost, the potential for overspecialization, and the viability of any system established to manage it (Wilcox, 2012).

JES project. The JES has not only developed a competency framework, but has also implemented a certification program that is based on completion of a training program and a passing score on the related exam (Morra Imas, 2010). The JES conducted a study of certification of evaluation capacity from 2005 to 2007, collecting information both from within Japan and internationally (United States and Canada). The JES has proposed three levels of certification: the certified professional evaluator (CPE), the certified specialty evaluator (CSE) for evaluators in educational settings, and the certified advanced evaluator (CAE).

The first two of these (CPE and CSE) are operational at this time (Sasaki & Hashimoto, 2012). The 6-day CPE training program covers basic evaluation logic and planning, culminating in a 40-item

multiple choice test the following month to determine who becomes certified. To date, over 230 individuals have received CPE credentials. A smaller program that has credentialed about 20 people since its inception in 2011, the 7-day CSE training focuses on the practical conduct of educational evaluation, including field practice (Sasaki & Hashimoto, 2012).

CES project. Zorzi, McGuire, and Perrin (2002) conducted the Canadian project under the auspices of the CES. They were able to broadly engage evaluators in the discussion of developing “a core body of knowledge” (CBK) for program evaluation. They conducted two Internet consultations with the evaluation community, two discussion sessions with delegates at the CES 2002 National Conference, and online discussions among the members of an invited, international expert reference panel (Zorzi et al., 2002, p. i). They identified a list of 151 knowledge elements and grouped them into 23 more general elements that were further categorized into six categories: ethics, evaluation planning and design, data collection, data analysis and interpretation, communication and interpersonal skills, and project management (Zorzi et al., 2002, pp. 31–46).

Although the CES had sought the “foundational knowledge” required of program evaluators by developing and updating the Essential Skills Series and commissioning the research project of the CBK, it was not until more recently that the Professional Designations Core Committee (PDCC) of the CES proposed the Competencies for Canadian Evaluation Practice. Built on the ECPE advanced by Stevahn et al. (2005), the PDCC of CES conducted a crosswalk of the latest version of ESS, the CBK Study, Treasury Board Secretariat Competencies for Evaluators in the Government of Canada, the Joint Committee Program Evaluation Standards, the American Evaluation Association’s Guiding Principles for Evaluators, and the United Nations Competencies for Evaluators in the United Nations System. The crosswalk identified the gaps and overlaps among existing evaluator competencies so as to provide a comprehensive list of evaluator competencies for Canadian evaluation practice. After member consultation and expert validation in 2008 and 2009, the CES membership approved the Competencies for Canadian Evaluation Practice in May 2009. (See Buchanan and Kuji-Shikatani, this issue).

On the journey toward professionalization, then, the CES and the JES have travelled farthest. These two societies were the first pro-

essional organizations that not only developed competencies for evaluators, but also implemented voluntary credentialing systems. It is the involvement of the government in the process of professional designations that may distinguish the Canadian approach in pursuit of professionalization of evaluators.

Evaluation in Canada, similar to most jurisdictions around the globe, is heavily driven by government ... The majority of members of CES, whose roles currently number somewhere in the neighborhood of 1,800, are organizationally located in government, mostly at the federal level, but with significant representation from provincial and municipal counterparts ... [I]t stands in marked contrast to that of the American Evaluation Association (AEA) most notably with respect to representation from the academic sector. We understand that slightly more than 40% of AEA's membership is organizationally located in colleges and universities. (Cousins, Cullen, Malik, & Maicher, 2007, p. 1)

With the involvement of the government, it appeared more likely that the Canadian Evaluation Society could develop a certification (or even licensure) system for evaluators with less possible concern about legal implications, which have become a roadblock for the American Evaluation Association (Altschuld, 2007).

In 2010, the CES officially adopted its professional designations through the Credentialed Evaluator program. A CE is a credential holder who “has provided evidence of the education and experience required by the CES to be a competent evaluator” (CES website, <http://www.evaluationcanada.ca>). The CE program is based on three “pillars”:

1. The CES Guidelines for Ethical Conduct (approved by the National Council in 1996 and reviewed in 2006)
2. The Joint Committee Standards for Program Evaluation (Yarbrough et al., 2011) (with representation from CES and adopted by the CES National Council in March 2008 as standards for effective Canadian evaluation practice)
3. The Competencies for Canadian Evaluation Practice (approved by the CES membership in May 2009). The Competencies for Canadian Evaluation Practice build on Stevahn et al.'s (2005) research (Canadian Evaluation Society National Council, 2007c, p. 7), along with a crosswalk of different sources of competencies related to evaluation.

Both the Essential Competencies for Program Evaluators and the Competencies for Canadian Evaluation Practice seek to exhibit the knowledge, skills, and attitudes needed for an evaluator to produce accurate and credible evaluations.

FURTHER PROGRESS IN DEVELOPING EVALUATOR COMPETENCIES

Aware of the development of evaluator competencies in North America and Japan and coupled with an intrinsic need for professionalization, increasing numbers of professional evaluation organizations and associations worldwide have joined the discussion on evaluator competencies as well as certification and credentialing of evaluators. In Europe, the German Evaluation Society (DeG Eval) has recently developed recommendations for education and training in evaluation (DeG Eval- Gesellschaft für Evaluation e.V., 2008). They outline five competency fields that evaluation education and training programs should cover: (a) theory and history of evaluation, (b) methodological competencies, (c) organizational and subject knowledge, (d) social and personal competencies, and (e) evaluation practice. The European Evaluation Society also proposed a competencies framework for European evaluators, which focused on three categories of competence: (a) evaluation knowledge, (b) professional practice, and (c) dispositions and attitudes. To date, the EES has not yet formally adopted the proposed competencies.

In 2011 the Aotearoa New Zealand Evaluation Association published its set of evaluator competencies developed to be relevant and appropriate to the context of Aotearoa New Zealand (Wehipeihana, Bailey, Davidson, & McKegg, this issue). Four interrelated competency domains, each with a list of competencies, are needed to successfully practice evaluation in Aotearoa New Zealand. These four domains are (a) contextual analysis and engagement, (b) systematic evaluative inquiry, (c) evaluation project management and professional evaluation practice, and (d) reflective practice and professional development. Other national and regional evaluation associations, such as the Australasian Evaluation Society (AES), the African Evaluation Association (AfrEA), and the Swiss Evaluation Society (SEVAL), have similarly developed guidelines and/or ethical standards for evaluation, but have not specified evaluator competencies.

In addition to national and regional evaluation associations, some international organizations, including development aid organizations,

have worked to develop competency frameworks. These frameworks may be in response to the need to rationalize hiring decisions. In what he labels a “Rant on Widespread Evaluation Nonsense,” Patton (2011, pp. 66–67, 69) highlights his perception of the sometimes sorry state of evaluation in international development where unskilled evaluators are hired because they are available at the time needed. Identifying evaluation practitioners as competent might well prove helpful to those charged with hiring them. The Evaluation Capacity Task Force of the United Nations Evaluation Groups (UNEG), for example, developed core competencies for evaluation staff at different levels of expertise. The United Kingdom’s Department for International Development (DFID) is considering use of the competencies to establish a pool of accredited evaluation specialists. The International Board of Standards for Training, Performance, and Instruction (IBSTPI) developed a set of evaluator competencies for internal staff or external consultants conducting evaluations in organizational settings (Russ-Eft, Bober, de la Teja, Foxon, & Koszalka, 2008). The International Development Evaluation Association set out to explore the issue of competencies for international development evaluators in 2008. The initiative quickly grew into eight areas: (a) theory of change, (b) core competencies, (c, d) competencies for evaluation managers and commissioners of evaluations, (e) ethical standards and guidelines, (f) certification and credentialing, (g) member consultations, and (h) communications. In 2010, the Ethical Standards and Guidelines, the Competencies for Managers of Development Evaluations, the Competencies for Commissioners of Evaluations, and the Core Competencies for Development Evaluators were drafted.

A FUTURE ROLE FOR COMPETENCIES IN THE FIELD OF EVALUATION?

In thinking about competencies and credentialing, evaluators face a dilemma. On the one hand, the field of program evaluation could potentially benefit from evaluator competencies as a foundation to guide training programs for novice practitioners, develop continuing education for experienced professionals, and conduct periodic reviews to ensure the integrity of the field (Stevahn et al., 2005; Wilcox, 2012). Using competencies to develop certification or other credentialing processes and, ultimately, to exclude unqualified practitioners could continue the field’s movement toward the status of a true profession, especially if such credentialing were based on empirical evidence of effective practice. But, on the other hand, there must be meaningful reasons why the movement toward develop credentialing has to date

led to only two professional associations' commitment to doing so. Why has the field not yet conducted research that could ground the creation of a meaningful system of credentialing?

Clearly, the evaluation community has not fully reached consensus on a set of evaluator competencies that would represent the diverse philosophical and practical approaches currently used in program evaluation (King et al., 2001; Smith, 1999; Worthen, 1999). It seems evident that the external pressures that in part encouraged and supported the development of the JES and CES credentialing programs do not exist in every country around the world. Many evaluators, fearing a potential loss of professional status, may well argue that "if it ain't broke, don't fix it." If the field has survived for almost 50 years without formal credentialing, what are the compelling reasons for such development at this time? In discussing the movement toward professionalization in Québec, Jacob and Boisvert (2010) note that "one element underestimated by theorists is the political challenge faced by promoters of the professionalization of evaluation" (p. 365).

What are the implications of the current situation? First, with two national credentialing systems already in place, careful research documenting the JES and the CES programs' contexts, development, implementation, and outcomes may provide lessons for associations or organizations that choose to follow. Second, other professional associations or organizations for evaluators—including, for example, country-wide associations, regional associations, and perhaps even IDEAS—may want to begin realistic conversations about the potential for credentialing systems in their contexts, knowing that, understandably, political and resource challenges may overwhelm initial efforts. Third, those associations that choose to move forward could identify and shape an approach for developing competencies. Such efforts may benefit from earlier work in the field of management (e.g., the process outlined in Figure 2), and, ideally, the competencies would be subject to a rigorous validation process. The real question is whether, after 50 years and regardless of their setting, evaluators see the potential value of competencies for the field and are willing and able to take this step toward increasing its professional status.

NOTES

- 1 By these definitions, what are labeled "competencies" in the Essential Competencies for Program Evaluators are not competencies *per se*, but rather they outline evaluator competence.

- 2 The earliest origins of the conscious competence learning model are not clear, although the US Gordon Training International organization played a major role in defining it and promoting its use. From <http://www.businessballs.com/consciouscompetencelearningmodel.htm>, retrieved on July 31, 2012

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