Competencies for Evaluators and Didactics of Evaluation: Experiences from within the DeGEval

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6 October 2010, 17:30h, Strand 1 – Evaluation competencies

1. Competencies for evaluators
2. Didactics of Evaluation
3. Outlook

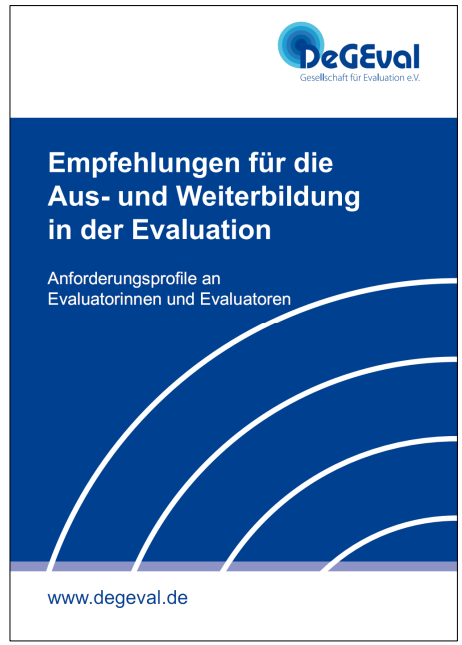
1. Competencies for evaluators

Rationale

Why develop "Recommendations on Education and Training in Evaluation"?

- Growing demand for evaluation services
- Lack of qualified personnel
- Lack of a professional profile

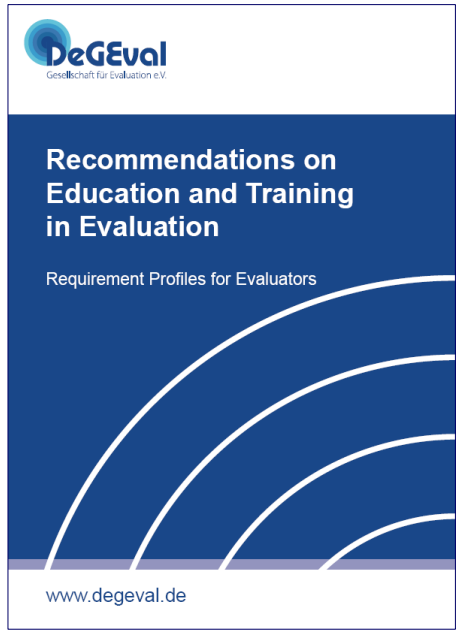
⇨Guidelines as contribution to the professionalization of evaluation



Development

A bit of history...

- 2004: First German edition
  - Authors: A. Caspari, M. Hennen, D. Scheffler, U. Schmidt & O. Schwab
  - Published by the DeGEVal working group "Education and Training in Evaluation“
- 2008: English translation



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Aims

Intended uses of the guidelines and competency profiles

- Standards for
  1. training programmes teaching evaluation
     - Direction for programme developers and teachers
     - Evaluation of existing programmes
  2. assessing evaluators
     - Choice of an evaluator by clients
     - Self-evaluation of evaluators

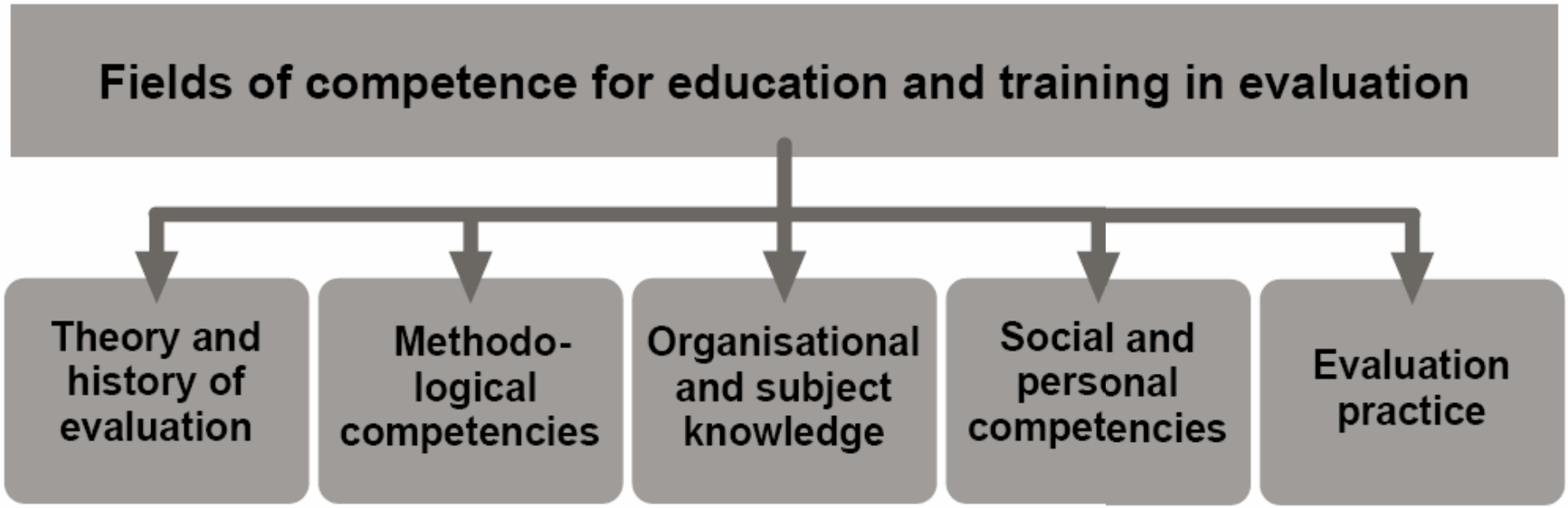
Definitions

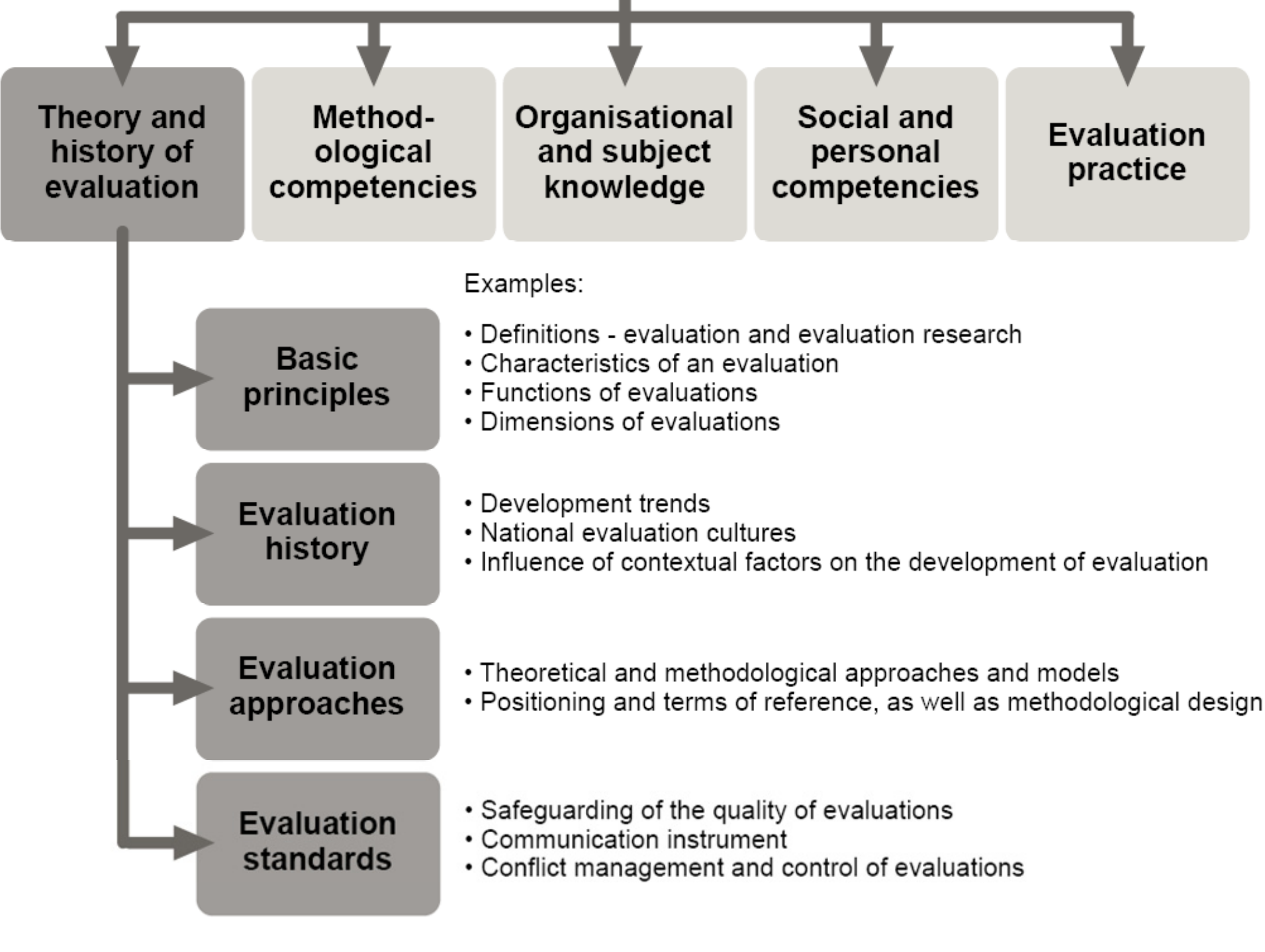
"A **competency** is more than just knowledge and skills. It involves the ability to meet complex demands, by drawing on and mobilising psychosocial resources (including skills and attitudes) in a particular context."

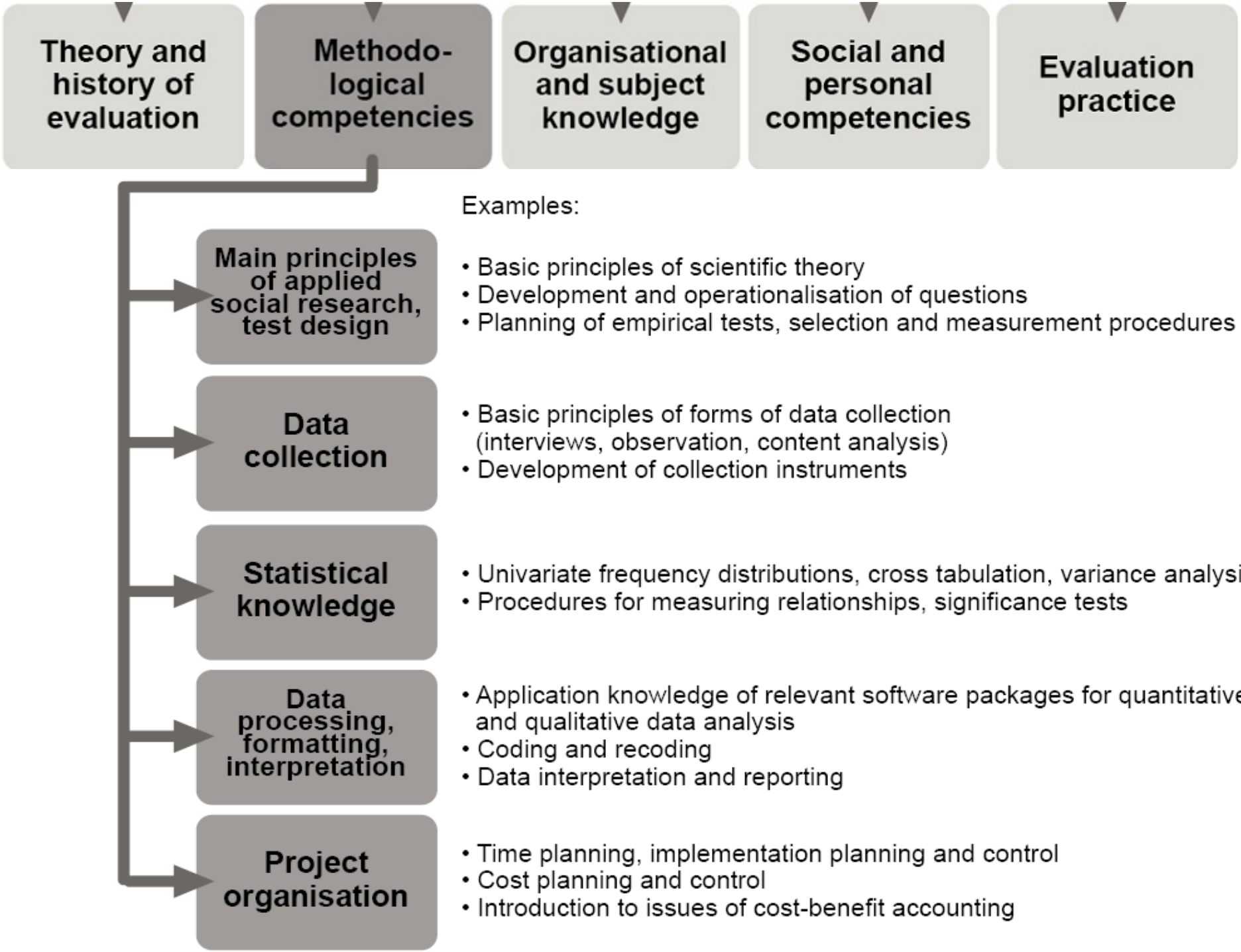
(OECD/OCDE DeSeCo-Project)

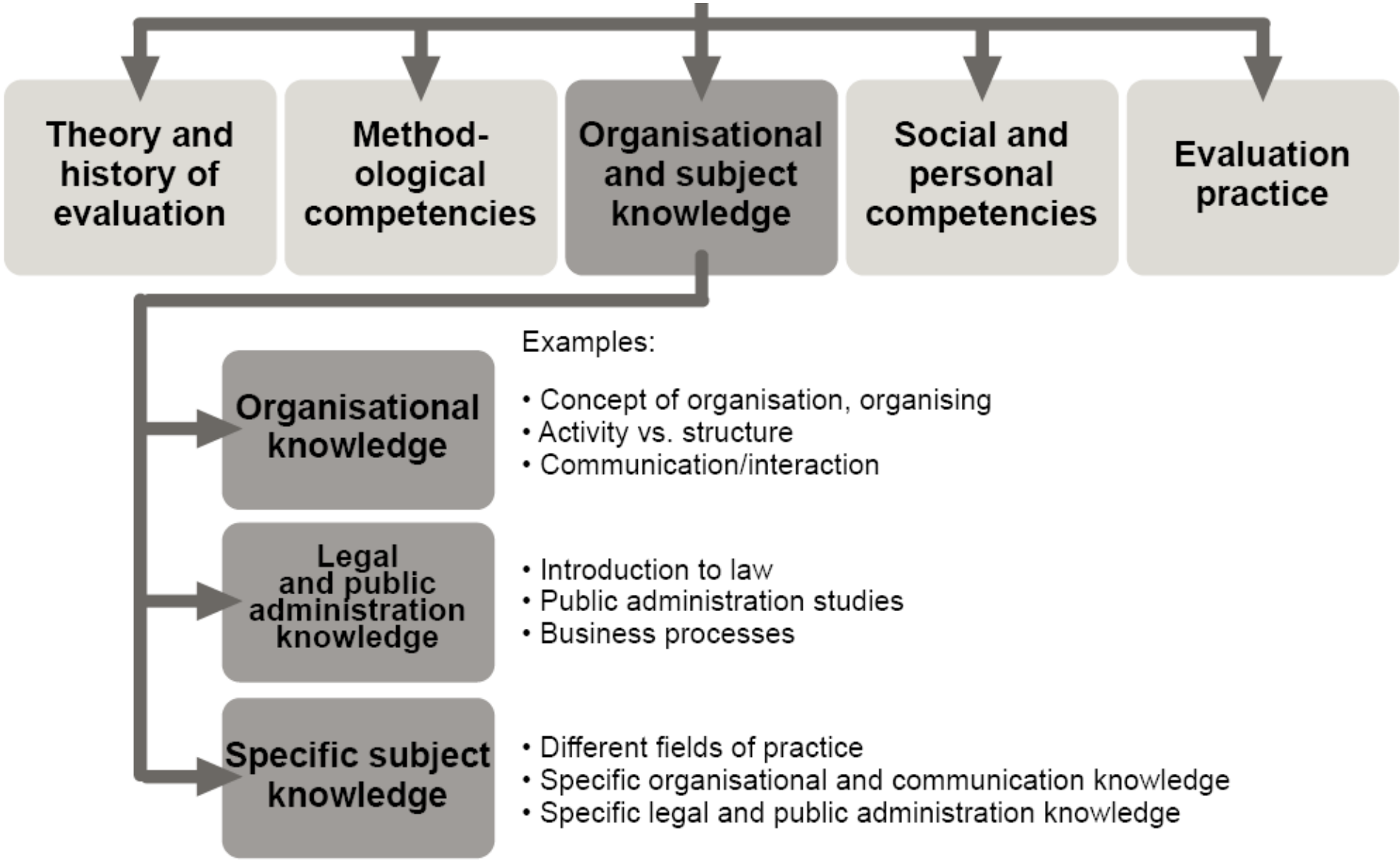
⇨Which **knowledge**, **skills** and **attitudes** are needed for conducting professional evaluations?

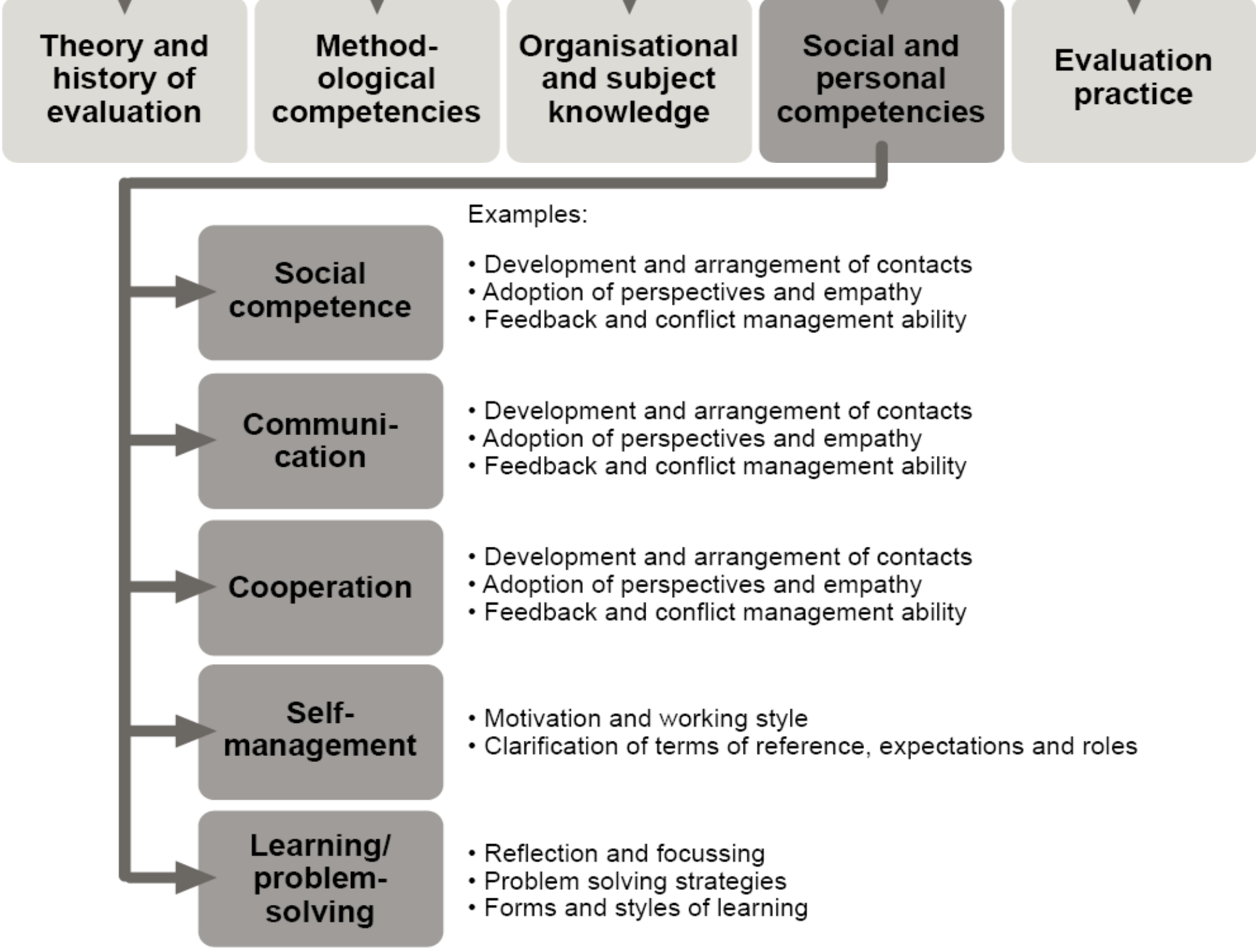
Fields of competence




Theory and history of evaluation
Method-ological competencies
Organisational and subject knowledge
Social and personal competencies
Evaluation practice
Examples:
Basic principles
• Definitions - evaluation and evaluation research
• Characteristics of an evaluation
• Functions of evaluations
• Dimensions of evaluations
Evaluation history
• Development trends
• National evaluation cultures
• Influence of contextual factors on the development of evaluation
Evaluation approaches
• Theoretical and methodological approaches and models
• Positioning and terms of reference, as well as methodological design
Evaluation standards
• Safeguarding of the quality of evaluations
• Communication instrument
• Conflict management and control of evaluations


Theory and history of evaluation
Methodo-logical competencies
Organisational and subject knowledge
Social and personal competencies
Evaluation practice
Examples:
Main principles of applied social research, test design
• Basic principles of scientific theory
• Development and operationalisation of questions
• Planning of empirical tests, selection and measurement procedures
Data collection
• Basic principles of forms of data collection (interviews, observation, content analysis)
• Development of collection instruments
Statistical knowledge
• Univariate frequency distributions, cross tabulation, variance analysis
• Procedures for measuring relationships, significance tests
Data processing, formatting, interpretation
• Application knowledge of relevant software packages for quantitative and qualitative data analysis
• Coding and recoding
• Data interpretation and reporting
Project organisation
• Time planning, implementation planning and control
• Cost planning and control
• Introduction to issues of cost-benefit accounting


Theory and history of evaluation
Method-ological competencies
Organisational and subject knowledge
Social and personal competencies
Evaluation practice
Organisational knowledge
Legal and public administration knowledge
Specific subject knowledge
Examples:
• Concept of organisation, organising
• Activity vs. structure
• Communication/interaction
• Introduction to law
• Public administration studies
• Business processes
• Different fields of practice
• Specific organisational and communication knowledge
• Specific legal and public administration knowledge


Theory and history of evaluation
Method-ological competencies
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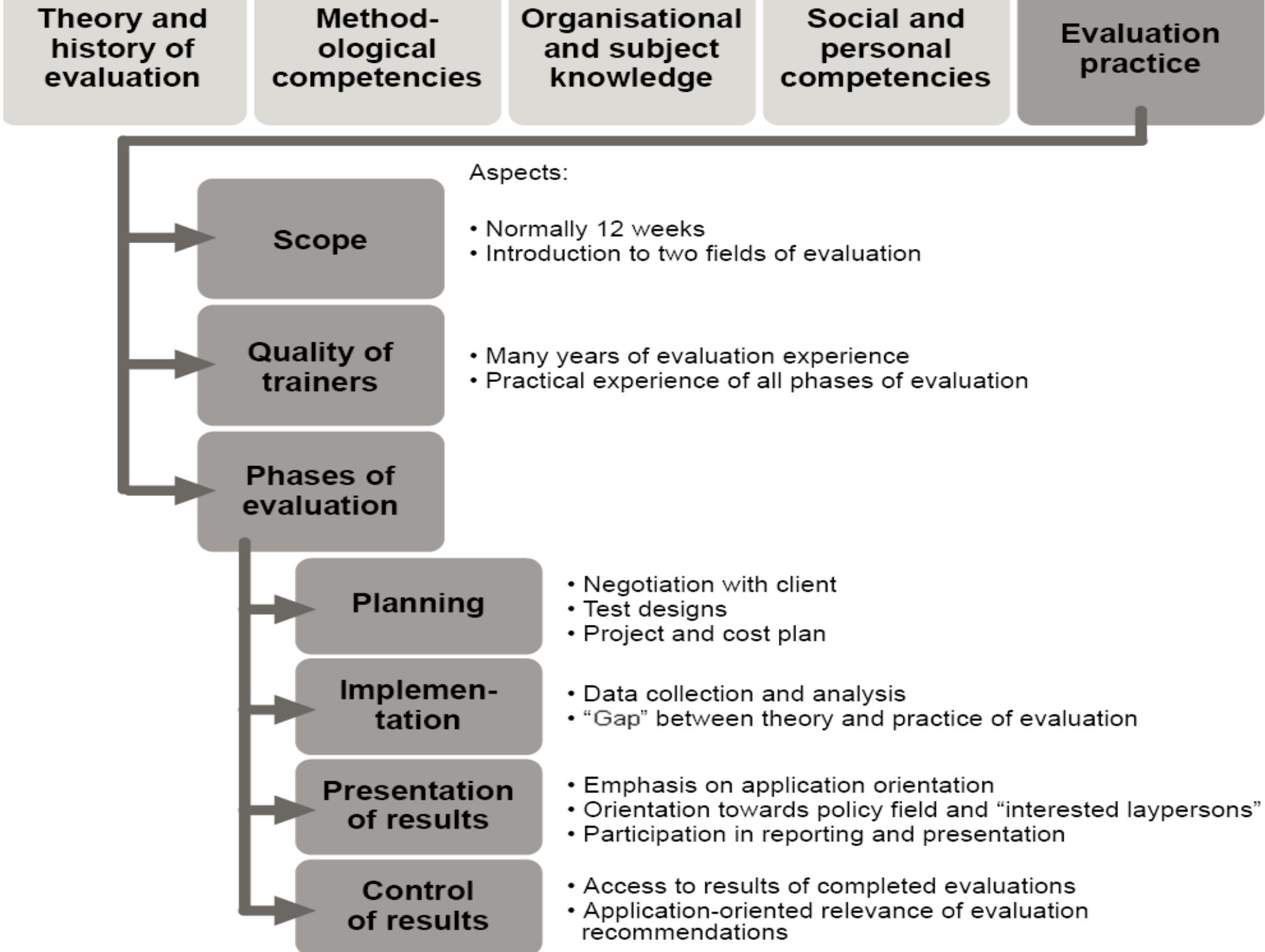
Evaluation practice
Examples:
Social competence
• Development and arrangement of contacts
• Adoption of perspectives and empathy
• Feedback and conflict management ability
Communi-cation
• Development and arrangement of contacts
• Adoption of perspectives and empathy
• Feedback and conflict management ability
Cooperation
• Development and arrangement of contacts
• Adoption of perspectives and empathy
• Feedback and conflict management ability
Self-management
• Motivation and working style
• Clarification of terms of reference, expectations and roles
Learning/ problem-solving
• Reflection and focussing
• Problem solving strategies
• Forms and styles of learning


Theory and history of evaluation
Method-ological competencies
Organisational and subject knowledge
Social and personal competencies
Evaluation practice
Aspects:
Scope
• Normally 12 weeks
• Introduction to two fields of evaluation
Quality of trainers
• Many years of evaluation experience
• Practical experience of all phases of evaluation
Phases of evaluation
Planning
• Negotiation with client
• Test designs
• Project and cost plan
Implemen-tation
• Data collection and analysis
• "Gap" between theory and practice of evaluation
Presentation of results
• Emphasis on application orientation
• Orientation towards policy field and "interested laypersons"
• Participation in reporting and presentation
Control of results
• Access to results of completed evaluations
• Application-oriented relevance of evaluation recommendations

Procedure

How did they go about it?

Theoretical approach

- Based on DeGEval standards of evaluation

Practical procedure

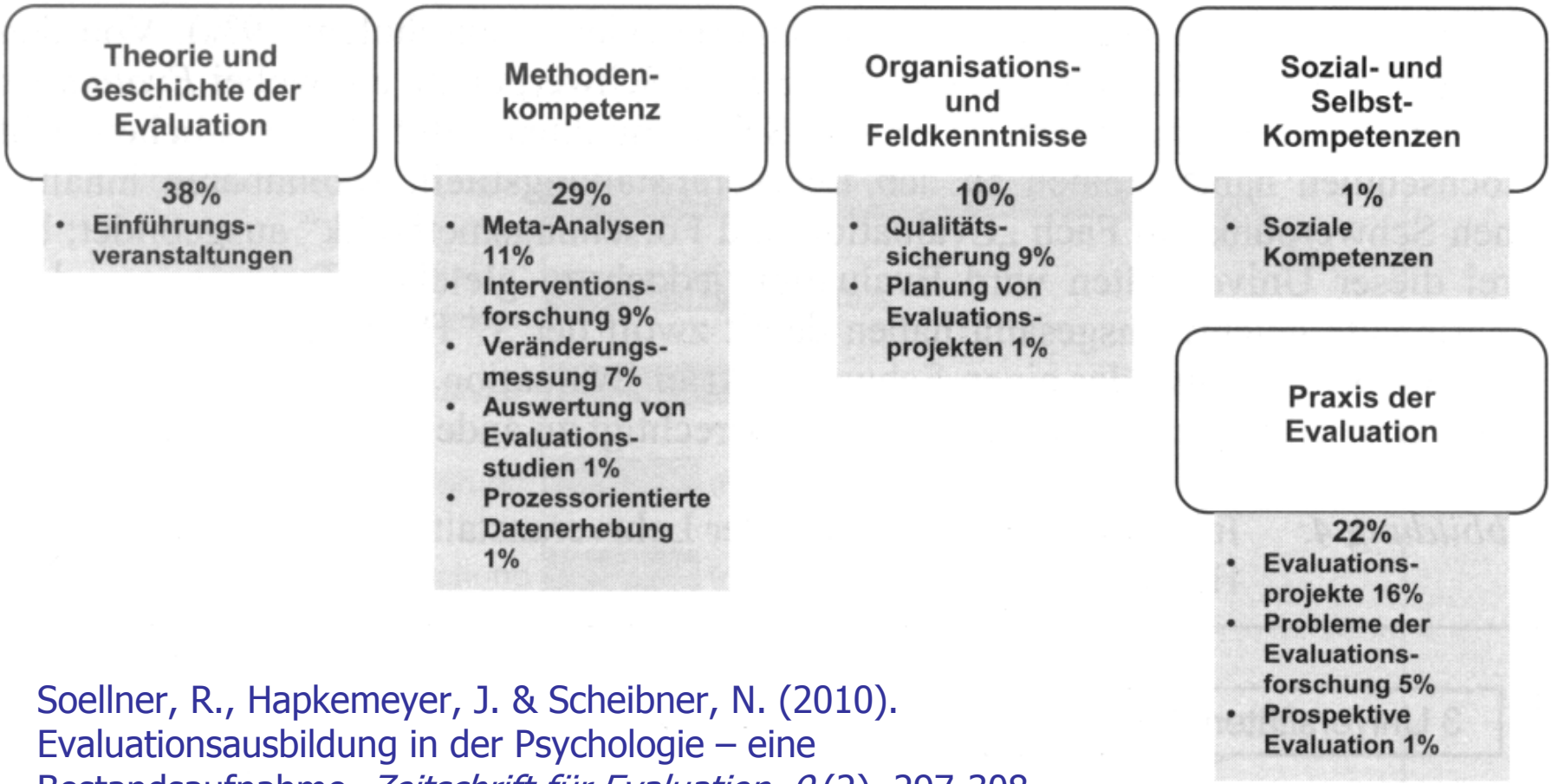
- Expert panel
- Feedback cycles from DeGEval members
- Officially adopted by DeGEval conference

Impact

Who uses the guidelines?

- Basis of curriculum in advanced study programmes
  - Berne ✓
  - Saarbrücken ✓
  - Bonn ✓
- Further education courses **?**
- Evaluation courses within a domain-specific curriculum **?**

Coverage in Psychology diploma programmes



Soellner, R., Hapkemeyer, J. & Scheibner, N. (2010). Evaluationsausbildung in der Psychologie – eine Bestandsaufnahme. *Zeitschrift für Evaluation, 9* (2), 297-308.

What next?

Further analysis:

- Dissemination among key intended users
  ⇨ measures to **improve dissemination**
- Current users' views on **need for revision**

Online survey of

- DeGeval membership
- Relevant experts
- Alumni from advanced study programmes
- Other relevant stakeholders

Need for revision (to be discussed)

- Concept of competencies (KSA)
- Field-specific interpretation and differentiation
- Elaboration of methodological competencies
- Compatibility with international models of evaluator competencies, e.g.
  - King et al. (2001; 2005); Mertens (1994)
  - Zorzi, McGuire & Perrin (2002)
  - Russ-Eft et al. (2008)

2. Didactics of Evaluation

Didactics of Evaluation

- Competency profiles
  - Contents and learning goals of training programmes
  - ⇨ **What** to teach
- Didactics of evaluation
  - Practical guidelines for teachers and trainers
  - ⇨ **How** to teach

Goals

- Provide guidance for
  - training and education programmes
  - courses in evaluation
  - self-learning materials (textbooks etc.)
- Based on current state of theories on learning and instruction
- Supplement existing recommendations on competency profiles

Contents

0 Executive Summary
1. Introduction
2. Learning contents and goals: Competence profiles for evaluators
3. Programmes
4. Types of programmes and target groups
5. Didactical foundation
6. Learning and teaching methods
7. Requirements for teachers/trainers
8. Outlook

Condensed "Cookbook" guidelines

Important Messages

- Cover whole range of competencies (KSA)
- Apply a mix of construction and instruction
  - Emphasize active, self-directed learning
  - Allow for learners' own practical experiences
  - Provide instructional support
  - Embed all contents in authentic evaluation contexts
- Match method and learning goals
- Adapt to learners‘ individual needs and preconditions

Examples

1. Chocolate cookie exercise
   - Exercise on the logic of evaluation
2. Reflection exercise „An evaluator is like a ...“
   - Discuss different evaluator roles and responsibilities
3. Role play „stakeholder resistance“
   - Awareness for possible sources of resistance to evaluation

To Dos

- Finishing touches (cookbook guidelines)
- Discussion within DeGEval
- Dissemination strategy
  - Active push strategy
  - Additional online material (case examples)

Future projects

Planned activities of the working group "Education and Training in Evaluation"

- Online survey
- Textbook overview and review
- Overview of training courses and seminars
- Capacity building
- Credentialing of evaluators

Thank you for your attention

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