International Society for Evaluation Education (ISEE)

Presents

Proceedings from the Evaluation Education Research Working Conferences

San Remo Pelicans, VIC AUS © AM Gullickson 2013

Where birds of a feather flocked together, face-to-face and online:
19-20 March and 6, 9-11 April 2018

Evaluation Education Research Working Conference Proceedings

Conference Dates and Locations

- In-person (hosted by University of Minnesota): Monday-Tuesday, 19-20 March 2018
- Online (hosted by University of Melbourne):
  - 9am AEST[1] Friday, 6 April 2018
  - 9 pm AEST Monday, 9 April 2018
  - 12 am AEST Tuesday 10 April 2018
  - 1 pm AEDT Wednesday 11 April 2018

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Gullickson, AM (2018). Introduction to the conference and the proceedings. In *Evaluation Education Research Working Conference Proceedings, March-April 2018*. Melbourne, Australia: University of Melbourne.

[1] Australian Eastern Standard Time - Coordinated Universal Time (UTC)+10 hours.

Acknowledgments/Sponsorship

The University of Melbourne hosted the online conferences, provided travel support for the academics who attended the MN conference, allowed Amy Gullickson time to organise the conferences and work on the proceedings, provided the LMS and Zoom platforms, and provided grant support for a research assistant to assist with compiling the proceedings.

University of Minnesota/Minnesota Evaluation Studies Institute hosted the face-to-face conferences including all logistical and hospitality support, as well as allowing Jean King and John LaVelle to devote time to the effort.

The **American Evaluation Association (AEA)** provided $1500 to defray expenses for the MN gathering.

The AEA Teaching of Evaluation Topical Interest Group provided their mailing list.

A note on language

A seed funding grant from the University of Melbourne Graduate School of Education covered the costs to have a Research Assistant (Emma Mildenhall) help with compiling the proceedings. As a result, this document and the introduction below have been written using Australian English. Presentation slides and discussion use the English of the presenter.

Table of Contents

Introduction to the conference and the proceedings

Background

In late 2016, Professor Janet Clinton and Dr Amy Gullickson at the University of Melbourne Centre for Program Evaluation had an idea for publishing discussion on the state of evaluation[2] education. Throughout the effort and research done to generate the content for their new fully online evaluation programs launched in 2015, Professor Clinton expressed that teaching and learning in evaluation needed a journal, a type of publication offered by several other disciplines. Clinton and Gullickson thought that a "forum"-type article would provide a discrete, publishable opportunity to explore what was currently known, and what was not, about educating those who practice evaluation. This foray would establish whether there was a need and appetite for this kind of research. In Minnesota, Professor Jean King had been thinking along the same lines, and was planning to conduct a literature review on evaluation education. In early 2017, the three connected and discussed possibilities. Professor King was open to the forum as a first step. Dr Gullickson was chosen as the lead author and coordinator of the effort.

Together they determined that the structure of the forum would use Stufflebeam's CIPP model (Stufflebeam & Zhang, 2017) to treat evaluation education as an evaluand and consider the key questions "What's so? So what? Now what?" (Eoyang & Holladay, 2013, p. 30) to frame a discussion of the current state, its coverage and gaps, and implications for future research. Each section of the CIPP model would get a three-page discussion, presented by the creator and additional authors as follows: Context - Professor King; Inputs (People) - Ms Nan Wehipeihana, an Indigenous evaluator from New Zealand; Inputs (Content/Curriculum) - Dr Gullickson; Process (Pedagogies) - Dr John LaVelle; and Product - Professor Clinton. Once the authors began writing their sections, it became clear that three pages were insufficient to cover the key issues, and the paper structure switched from a short forum to a full-length article. Ms Wehipeihana provided thoughts on Indigenous needs for evaluation training, but was unable to commit to writing a longer section. From that point, the paper proceeded as a joint effort, with the remaining authors writing and commenting on each other's work across all sections. Dr Gullickson consolidated and wrote through the final version, which, after review by the team, was submitted to a journal in December 2017.

Through the work on the paper, the authors realised how unconnected to each other the people teaching evaluation were, often working separately and in isolation. In addition,

[2] The authorship team for the article debated whether to use evaluator or evaluation. At the time of the conference, the team had decided on evaluation (education in the discipline of evaluation). In the more recent version of the article, the team opted for evaluator (education of the people who will do evaluation, á la teacher education). However, the research community convened by these conferences will focus on evaluation education – that is, training for all those who intersect with the discipline.

the contexts in which these educators were working (professional development and formal education) made heavy demands on their time and left little space for research on evaluation education, even in university settings. Independent conversations between the Melbourne and Minnesota authors reached the same conclusion: the best way forward would be collaborative, generating a group and a conversation around research on educating people about evaluation, effectively providing opportunities for connection, sharing of ideas, and generation of research activities and partnerships. Thus, the idea for the working group and the conferences to launch the group was hatched. Professor King, Dr Gullickson, and Dr LaVelle took the lead on organising and planning the sessions.

The authors also recruited additional support for the sessions. They attended the Teaching of Evaluation Topical Interest Group (TIG) meeting at the American Evaluation Association conference in 2017 and enlisted the sponsorship of the TIG for the events, including distribution of marketing materials to the TIG's membership list. In addition, Professor Stewart Donaldson from Claremont Graduate University agreed to distribute information to a network of contacts and graduates.

Process

Minnesota hosts the Minnesota Evaluation Studies Institute (MESI) Spring Training in March each year. Prior to the 2018 event, Professor King and Dr LaVelle agreed to sponsor and host a one-and-a-half-day face-to-face conference. To make the community available to those who could not attend the face-to-face event, the University of Melbourne agreed to organise the online Learning Management System (LMS) and a series of online conference sessions via Zoom in April 2018. To make the conferences appealing, a peer review process was used on session proposals and proceedings were planned. To ensure time for conversation and collaboration on future research, presentations were kept short (three to five minutes), following the one slide, three-minute format[3] developed by The University of Queensland, which has been used successfully for thesis presentations internationally and in the University of Melbourne's online teaching. This format provided a structure suited to the compressed time of the conference sessions.

For the Minnesota face-to-face conference, a call for proposals was sent out via the American Evaluation Association's list serve EVALtalk and the organisers' and sponsors' networks in December 2017 (EVALtalk postings, Appendix A). In mid-January, the deadline for proposals was extended to 31 January through a second posting. Conference registration and proposals were handled by the University of Minnesota through their online conference system. Organisers reviewed the proposals, and accepted presenters were informed in early February 2018. The organisers invited Professor Laurie Stevahn from Seattle University to facilitate the session, and she agreed. The University of Minnesota partially covered her travel expenses.

[3] https://threeminutethesis.uq.edu.au/

Together Professor Stevahn and the team planned the schedule for the one-and-a-half-day event, which included presentation of public agreements for the group, a discussion of the draft paper, participant presentations, and collaborative group discussions on directions for future research (Conference Schedule, Appendix B).

For the online conference sessions, an expression of interest (EOI) process was used to allow people to indicate dates and times they would be available for online sessions. The EOI was sent via the same channels and networks used for the Minnesota conference and used www.whenisgood.net, which allowed respondents to view and select options in the appropriate time zone for their location. Dr Gullickson reviewed the responses and selected times and dates based on the highest number of responses covering the most time zones. Once times were established, those who had expressed interest were invited to register and propose a presentation via an online survey. The registration notification was also sent out via EVALTalk in March 2018, just prior to the Minnesota Conference. The organisers reviewed the online presentation proposals, and Dr Gullickson arranged the online schedule according to their stated availability in the registration and contacted the accepted presenters. The agenda for the online sessions mirrored the Minnesota conference, beginning with public agreements and discussion of the draft paper, followed by participant presentations and discussion.

Instructions

Dr Gullickson prepared a workshop pack for both the face-to-face and online sessions. This included an introduction to the working conference, a basic agenda, directions for presentations, a link to a recorded example of a three-minute presentation (the first presentation of the conferences), the draft co-authored paper (with permission from the journal where it was under review), and a set of discussion questions related to it. Appendix C includes the full conference pack for the Minnesota conference; Appendix D is the introductory pages from the online conferences; Appendix E includes the Powerpoint templates and directions for the presentations for both sets of conferences.

The LMS

Dr Gullickson built the LMS in consultation with the University of Melbourne's Learning Environments team. The LMS Community option was chosen over Google docs or other collaboration packages because it was a restricted access platform, which made it acceptable for sharing non-published materials, and could be made accessible to users outside the university. The LMS structure provided a way to offer access to the community's details and services including:

- Agreements and processes for community life
- Zoom Room access information and recordings of the online sessions

- Discussion board for asynchronous conversation on topics following the sessions, with the ability to personalise posts with a profile photo and include attachments
- Turnitin for plagiarism check and uploading proceedings documents

Members entered via a username and password assigned by the system, sent to the email they provided when they registered for the Minnesota or online sessions. Dr Gullickson managed the LMS invites and assisted new members with login issues; invitations were sent following the Minnesota conference. The LMS landing page was a welcome from the conference organisers and sponsors, which directed viewers to a page called "Life Together."

Life Together

The goal of the community was to bring together people who were engaged in teaching evaluation in both formal (universities) and informal (professional development and evaluation capacity building) settings, as published research was lacking in both. The challenges of collaborative research and co-authorship, along with the documented difficulties experienced in relationships between academics and practitioners (Staggs, 2008), meant that pre-emptive steps needed to be taken to make the community an equitable, collaborative, and productive space. Dr Gullickson, Professor Stevahn, and the Minnesota conference attendees contributed to establishing agreements and processes to encourage the desired behaviour in the community space. These principles for life together were discussed at the beginning of all the conference sessions online and in Minnesota; they are presented in Appendix F, excerpted from the LMS.

Results

Approximately 35 people attended the Minnesota conference. Numbers shifted across Monday-Tuesday; not all who registered were able to attend, and not all who attended were officially registered. Attendees represented four countries: USA (31), Canada (2), Australia (2), and Taiwan (1). The discussion of the draft paper provided a kick-off for the conversation, as well as feedback for a revised draft. The conversation focused primarily on the logic model. Day two began with a brief history of evaluation education by Dr LaVelle, then 23 people presented using a small group round robin format. There were three groups per 30-minute round, with up to three presentations (15 minutes total) and 15 minutes for discussion. Representatives from Voluntary Organizations of Professional Evaluators (VOPEs), both AEA and the Canadian Evaluation Society, wrapped the presentations for the day. Based on presentations and resulting conversation, six potential topic areas for future research were established, five of which had group discussions at the session (no one was interested in the literature review topic). The populated topic areas were included as discussion forums on the LMS (Table 1). University of Minnesota graduate students graciously served as note takers for the event.

Table 1. LMS Discussion Forums

Forum	Description
Curricula and standard setting	This forum focuses on the content of evaluation education. The big questions: • What does the process of translating the competencies into course content look like, and what can we learn from that experience? • What competencies or skills are the core? What differentiates evaluation (and evaluators) from other similar professions? • What are the performance standards for individual skills and/or competencies (e.g., novice, competent, proficient, expert, master)?
Disruptive	This forum discussion focuses on power, privilege, inclusiveness, community, and margins. The big questions: • How can we create learning pathways and access to evaluation education for people who don't have financial/academic/time or other resources to engage with existing professional development, capacity building, or formal evaluation education? • How can we teach people to speak truth to power?
Teaching strategies, pedagogy, andragogy	This forum discussion focuses on how we teach evaluation - strategies, pedagogy, and andragogy. The big questions: • How are ethics taught in other disciplines, and what can we learn from them? • What do evaluation educators need to know that's different from evaluation practitioners? What are the teaching perspectives of evaluation educators? Are any more effective than others? • What kind of job aids go with the various evaluation tasks and competencies? What aids exist and what do we need to develop? • What learning strategies are best suited for the kinds of things people who do evaluation need to learn (online self-directed drill and skill, field experiences, etc.)?
Informal and non-formal education	This forum discussion focuses on informal and non-formal evaluation education, happening in VOPEs (voluntary organizations for professional evaluation), regional and local organizations, professional development, and consultancies. We expect some overlap with some of the topic specific groups, but this is an area where we don't know much, so we want to give you your own space to organize!

Online conference sessions

Through the EOI survey, 47 people expressed interest in the sessions and 22 expressed interest in presenting. When the schedule was established, 29 people from 10 countries registered

across the four online sessions, some registering to attend multiple sessions. Actual attendance was lower due to an issue with time zone conversion for the Monday night and Tuesday morning sessions. Eleven people proposed presentations; all were accepted and ten presented (one did not due to illness). Recordings were captured from two of the sessions and posted on the LMS (operator technical error prevented the capture of the other two).

Learnings

Running the identically structured conference with two different registrations across two universities created issues in terms of tracking and consolidating registration lists and enabling timely contact with presenters for dissemination of instructions and participants in general with the basic details for the Minnesota conference. It continued to have ripple effects in seeking and consolidating the proceedings. For the future, we learned that these logistics should be handled by one person/institution.

Allowing participants the opportunity to do a peer-reviewed conference presentation was popular. More than half of the participants who registered for the Minnesota conference presented, and the majority of online session attendees were presenters.

The one-slide, three-minute presentation format was a challenge for many of the participants. As the proceedings demonstrate, many presenters used multiple slides; most were able to keep their presentation to five minutes or less, but most agreed it was difficult. The benefit was the opportunity to learn a little about a lot of interesting research and teaching efforts happening internationally. Future sessions may include a mix of shorter and longer presentations and discussions.

The LMS idea was good on paper, but the login process proved a significant barrier for several participants, and as of November 2018 there had been little activity in the community beyond some initial posts and uploading of presentation documents for the proceedings. Our ongoing efforts have focused on using publicly available options; we may move to a website to increase accessibility.

Sponsorship and financial support from University of Minnesota (conference venue, catering and other arrangements, facilitator travel, students to take notes), University of Melbourne (travel support, LMS hosting and build, grant support to provide staff for production of the proceedings), and the American Evaluation Association (financial assistance) were essential. Professor Jean King also generously hosted the Melbourne team for the duration to further reduce their travel costs.

The EOI time/date selection registration process was broadbrush. WhenIsGood was the best of available options; an experiment with Doodle created an unmanageable number of choices.

However, WhenIsGood did not help maximise attendees across sessions because it does not create downloadable data for analysis, which then had to be done manually. For upcoming sessions, we are using a pre-set selection of times and dates that work across time zones and allowing people to vote for sessions using www.tricider.com. This option makes all those who have selected a time visible, so maximising sessions to reach the most participants is possible, but the tool does not allow for generation of times by the group. This is also an issue for University of Melbourne's graduate online teaching, who are also pursuing a solution.

Time zone management and calculation was a significant issue. Registration for the Monday and Tuesday online sessions was high (11 and 16, respectively), but a miscommunication about time differences in the introductory materials resulted in low attendance (the link did not take into account changes due to daylight savings in Australia). Future efforts may include sending calendar invites to attendees with time zone differences automatically included and encouraging participants to use https://www.timeanddate.com/worldclock/meeting.html to check time zones.

References

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Research on Evaluative Synthesis

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Citation

Gullickson, A.M. (February, 2018). Gullickson 3 Minute Presentation Example: Research on Evaluative Synthesis. Created for the Eval Education Working Conferences, funded by the University of Melbourne, Centre for Program Evaluation. https://vimeo.com/254806836

Slide(s)

Overleaf

Description

I'm Amy Gullickson from the University of Melbourne Centre for Program Evaluation, and I'm going to talk with you today about my research on evaluative synthesis and the logic of evaluation. On the left had side of the slide you can see an image that describes what the logic of evaluation is; this was defined by Scriven (1991) in his Thesaurus and codified by Deborah Fournier in her article in 1995. The steps include establishing criteria, setting performance standards, measuring, which is the data collection step, and synthesising all that together into a defensible evaluation judgement. The bit that I'm interested in, particularly, is part where we put all that together. The values that come out of the criteria and standards, putting those together with the facts that come from our measures to understand overall, the goodness of the thing that we are evaluating – to arrive at that evaluative judgement. It's important that is defensible, so it means that we agree that it's actually true. My research stems partly out of the work that I've done on a class that I teach called Practice of Evaluation. I was particularly keen for our students to get some experience with evaluative synthesis, as it's not something that's taught very often, and not discussed much in the literature, but it's clearly central to what we do in terms of being able to make a judgement about value.

The research we are doing is in three parts. The first part is based on that class, Practice of Evaluation, where we've set students an assessment task: we provide a case based scenario that gives them the criteria and the data. They have to set standards and choose a synthesis method. They have to put all that together and arrive at an evaluative judgement which they report. Then they have to discuss the strengths and weaknesses of the method that they chose and how that all worked out. Right now we're in the ethics process – at the University of Melbourne students own their test data, so we have to ask permission from the students to look across their assessments. But we're planning to study that – see what

kind of methods they chose, if the methods they chose make a difference to the quality of the answers, and then try to figure out, does the method chose make a difference or is it really just about how will they make the argument. The other two are literature reviews. One is focused on the evaluation literature, particularly, looking across that to understand how we discuss synthesis and what we can learn about it from that. The second is a broader literature review that looks across disciplines to see how they talk about bringing facts and values together to arrive at those evaluative conclusions – whether or not they call it that. So that's a brief overview about our research on evaluative synthesis. I'm looking forward to hearing what you're researching at your institutions.

References

Fournier, D. M. (1995). Establishing evaluative conclusions: A distinction between general and working logic. *New Directions for Program Evaluation*, *1995*(68), 15–32. https://doi.org/10.1002/ev.1017

Scriven, M. (1991). *Evaluation Thesaurus* (Vol. 4th). Newbury Park, CA: Sage.

The Logic of Evaluation

1. Establish criteria
2. Set performance standards
3. Measure
4. Synthesise

Report evaluative judgement

Synthesis

Values

Facts

Evaluative judgement

Our Research

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Presentations

University of Minnesota presentations

On March 20, 2018 the University of Minnesota hosted a one-and-a-half-day face-to-face conference. The presentation schedule (Table 2) is presented below, followed by the submitted presentations.

Table 2. University of Minnesota Presentation Schedule

Name	Title of Proposal	Topics
Competencies in Evaluation Education		
Cheryl Poth	Competency-based approach within evaluation education: Curricular crosswalk from a Canadian doctoral course	Competencies Illustrative example Coursework
Michelle Searle	Competency-based approaches as pedagogy for evaluation	Competencies Pedagogy
Libby Smith	Aligning evaluator competencies with KSAs	Competencies
Evaluation Practice		
Tamara Walser	Framing the program evaluation capstone: Challenges and benefits	Coursework Capstone
Robyn Thomas Pitts	Experiential learning: How novice evaluators apply their studies in field work	Application
AVAILABLE		
Affect		
Randall Davies	Teaching evaluator competencies in the affective domain	Competencies Affective domain
Chris Lovato	How do intentions and beliefs influence the teaching of evaluation?	Affective (teacher) Instructional design
Stacy Rassel	Interpersonal competencies by evaluators	Competencies
Assessment		
Leanne Kallemeyn	Assessing competencies using accreditation from other professions	Competencies Assessment
Anne Seraphine	Assessing student learning outcomes in program evaluation	Assessment
Discipline-specific curriculum		
Leah Neubauer	What is essential? Evaluation education coursework in public health	Public health Coursework

Name	Title of Proposal	Topics
		Discipline
Shi Kim	Structuring program evaluation programs in sociology	Curriculum Disciplinary content
AVAILABLE		
Delivery		
John LaVelle	Evaluation in undergraduate courses	Coursework Diversity
Lori Wingate	The promise and pitfalls of evaluation training via webinar	Context
AVAILABLE		
Evaluation Programs/Curriculum		
Shu-Huei Cheng	Implementation and challenges of evaluation education in Taiwan	Coursework Curriculum
Chad Jobin	An efficacy-based approach to evaluation education	Curriculum
Megan Kauffmann	Building a program of academic study in evaluation	Curriculum
Retention in Practice		
Tiffany Smith	Producing reflective evaluators	Reflective practice
Kelly Robertson	Job aids: Bridging the gap between evaluation practice and theory	Internship Checklist
AVAILABLE		
Diversity		
Vidhya Shanker	Race and evaluation: Critical competence	Diversity
Phillip Stoeklen	Evaluation education programs accessible to communities of color	Diversity
Nora Murphy	Teaching systems change through developmental evaluation	Curriculum
Professional association sponsored training opportunities		
Rodney Hopson	15 years of the GEDI program	Diversity
Sheila Robinson	AEA professional development strategy results in evaluation educator pathway	Professional development
Marla Steinberg	Setting the foundation for the Canadian Evaluation Society e-institute	Educational venues

Realizing a competency-based approach within evaluation education: An illustrative example of a curricular crosswalk from a Canadian doctoral course

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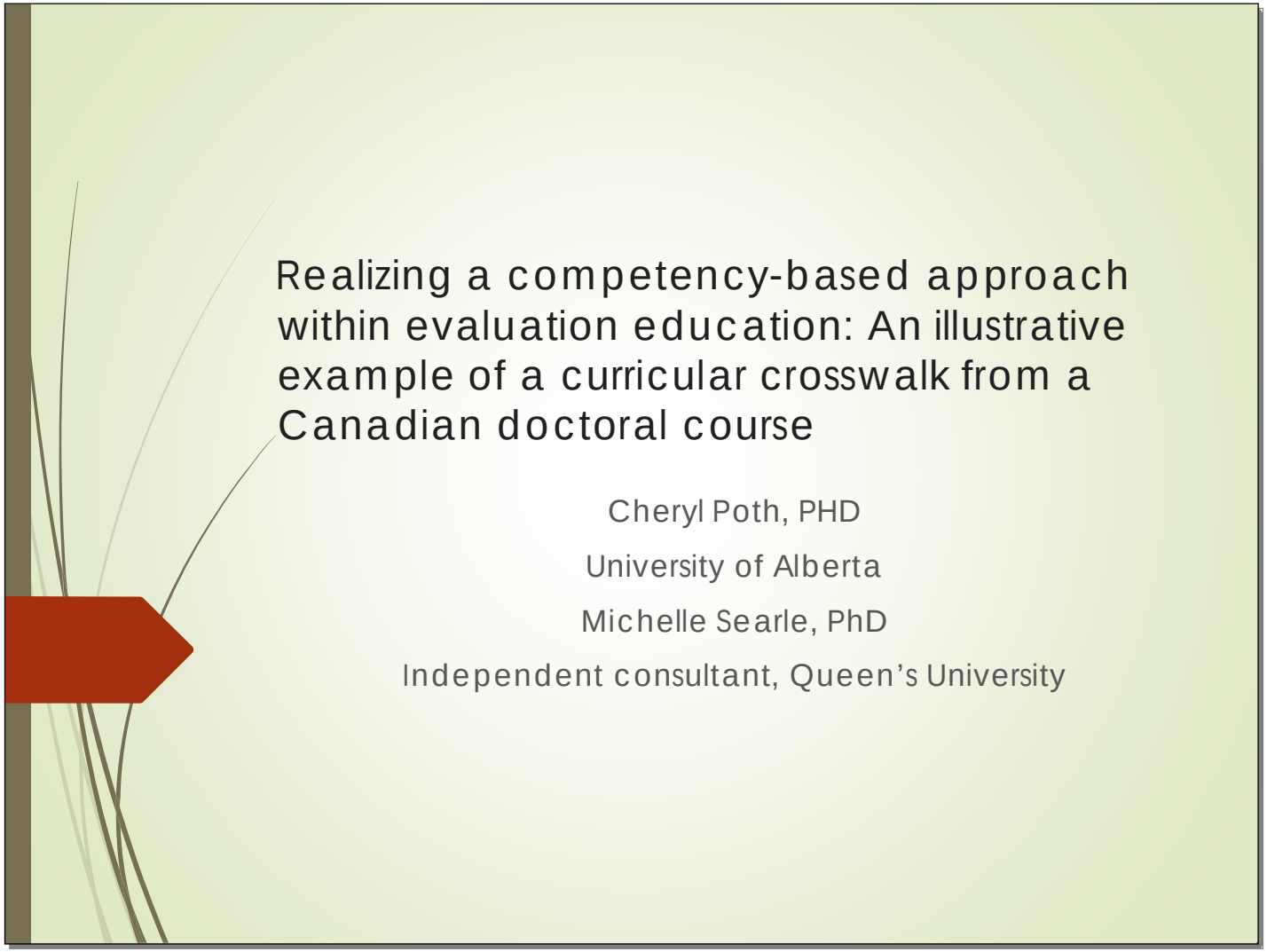
Citation

Poth, C. (2018, April 10). Realizing a competency-based approach within evaluation education: An illustrative example of a curricular crosswalk from a Canadian doctoral course. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

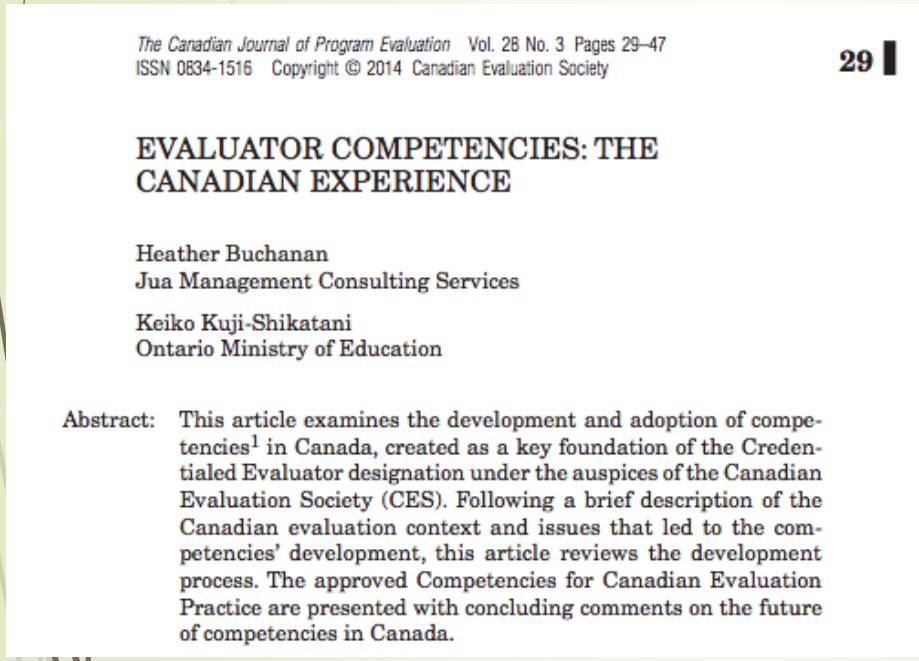
Slide(s)

Overleaf

Slide(s)


Realizing a competency-based approach within evaluation education: An illustrative example of a curricular crosswalk from a Canadian doctoral course
Cheryl Poth, PHD
University of Alberta
Michelle Searle, PhD
Independent consultant, Queen's University

What? Background to the Canadian context



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EVALUATOR COMPETENCIES: THE CANADIAN EXPERIENCE

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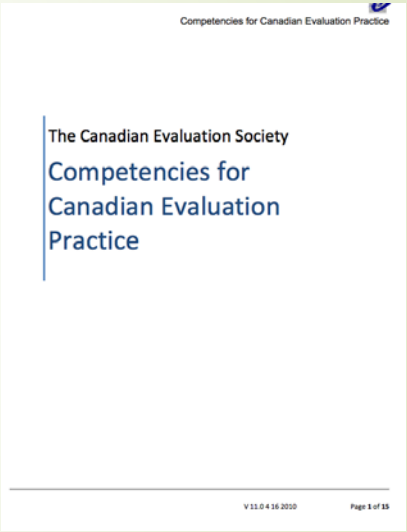
Ontario Ministry of Education

Abstract: This article examines the development and adoption of competencies[1] in Canada, created as a key foundation of the Credentialed Evaluator designation under the auspices of the Canadian Evaluation Society (CES). Following a brief description of the Canadian evaluation context and issues that led to the competencies' development, this article reviews the development process. The approved Competencies for Canadian Evaluation Practice are presented with concluding comments on the future of competencies in Canada.



The Canadian Evaluation Society

Competencies for Canadian Evaluation Practice

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Why? Our interests in the scholarship of evaluation education

Influential Mentoring Practices for Navigating Challenges and Optimizing Learning During an Evaluation Internship Experience

Cheryl Poth
University of Alberta, Department of Educational Psychology, Faculty of Education

Michelle Anderson-Draper
Alberta Children and Youth Services

Btissam El Hassar
University of Alberta, Department of Educational Psychology, Faculty of Education

Abstract : *The increased complexity of contexts that Canadian evaluators work in has important implications for evaluation education. Internship is a valued training component, yet what remains to be identified are empirically based quality indicators of the experience. Analyses of interviews with an intern, mentor, and coordinator supplemented by field notes revealed key features suggesting three influential mentoring practices: orientation to workplace context, autonomy of supervisory approach, and planning for evaluation agility. Implications for evaluation practice and evaluator induction are discussed in light of the Competencies for Canadian Evaluation Practice and three areas influenced by Dr. Lyn Shulha.*

Keywords: *evaluation internships, evaluation use, learning, mentors*

Résumé : *La complexité grandissante des contextes dans lesquels les évaluateurs canadiens travaillent a des conséquences importantes pour la formation en évaluation. Les stages sont une composante prisée de la formation, mais nous manquons encore d'indicateurs qui permettraient d'évaluer la qualité de cette expérience. Une analyse d'entrevues avec des stagiaires, mentors et coordonnateurs, complétée par des notes d'observation, révèle des caractéristiques clés qui suggèrent trois pratiques signifiantes de mentorat : l'orientation en contexte de travail, l'autonomie au niveau de l'approche de supervision et l'anticipation du besoin d'adaptation de l'évaluation. Nous discutons des répercussions pour la pratique de l'évaluation et pour l'initiation des évaluateurs au regard des compétences pour les évaluateurs canadiens et des trois domaines influencés par Mme Lyn Shulha.*

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EDPY 615 Fall 2017

Program Evaluation Course

Instructor: Dr. Cheryl Poth
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Office: 6-110 Education North
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Class Time, Location: Thursdays 9:00-11:50, ED N6-138

Course Overview
This course will *introduce* you to the complexity of social and program evaluation as a consultative process. This course is intended to allow you to undertake a leadership role in evaluation projects by initiating thinking as a program evaluator, who:

- selects evaluation theoretical framework(s) best suited to address the needs of program decision maker(s).
- adopts an attitude that is responsive to the emerging needs of program decision maker(s).
- employs the methodological tools best suited for the informational needs of program decision maker(s).
- pays attention to the implications for personal and organizational learning and general use of the evaluation process and products.

To do this, the course is guided by a competency-based approach to support the development of evaluation competencies as described by The Canadian Evaluation Society (2010), together we will develop competencies across five practice domains:

- Reflective Practice competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.
- Technical Practice competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation and reporting.
- 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.
- Management Practice competencies focus on the process of managing a project/evaluation, such as budgeting, coordinating resources and supervising.
- Interpersonal Practice competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.

How? Curriculum crosswalk example for Assignment 4

4. Evidence of Developing Evaluator Competencies To consider, in writing, key influences to your development of specific evaluation practice competencies	Each course participant will engage in reflection on their own development of three specific evaluation practice competencies and create a narrative reflection to communicate awareness of self as an evaluator. Max. 5 pages (1000 words) + references. Select three competencies each from different practice domains (Reflective, Technical, Situational, Managerial and Interpersonal) of the CES evaluator competencies highlighted by your post-course self-assessment as having been developed and as contributing to your personal course goals identified in your pre-course assessment. Provide evidence from your course experiences, self-assessments, and readings that you have developed the competency during the course and suggest potential future impacts of these three competencies.		
	Complete Pre-Course Evaluator Competency Self-Assessment	Required	Prior to class on September 14 and submit using eclass by Monday September 18
	Complete Post-Course Evaluator Competency Self-Assessment	Required	Prior to class on December 7 and submit using eclass by Monday September 11
	Prepare full draft for formative review & feedback	Recommended	Bring to class December 7

Process (hard to assess) - Guiding instruction	Outcomes (able to assess) – Guiding assessment
Interpersonal Practice **5.1 Uses written communication skills and technologies** **5.10 Demonstrates professional credibility**	Reflection Practice 1.6 Aware of self as an evaluator (knowledge, skills, dispositions) and reflects on personal evaluation practice (competencies and areas for growth)

So What? Potential implications of a competency-based approach to evaluation education in Canada and beyond....

- Flips how educational initiatives are planned to focus on outcomes
- Creates a comprehensive curriculum framework that can be used for planning educational programs

Description

Thank you for having me today. My name is Cheryl Poth and I am from the University of Alberta in Western Canada and my colleague who is contributing another presentation another day is Michelle Searle who is an independent consultant and new addition to Queen's University as of this summer. Our aim of this presentation is to contribute to the discussion about the role of competencies in curriculum development and implementation. To that end, I will talk about the what, why, how and so what of our current work.

To begin, what is the background to this work? Michelle and I are both credentialed evaluators having fulfilled the Canadian Evaluation Society designation requirements. If I back up a decade, I was even involved in the development of these competencies as a graduate student in which we were a pioneering global force. Evaluation education in Canada strangely enough has a very different background to that of our close neighbour the United States. We lack doctoral programs that focus on program evaluation but both Michelle and I were fortunate to study under the tutelage of Dr Lyn Shulha at Queen's University. When I joined the University of Alberta in 2008, I was tasked with teaching our sole doctoral course focused on program evaluation. I have always been an experiential learner so it was not surprising that I drastically changed the program from a theoretical focus to bridging with evaluation practice through embedding a community service requirement to design an evaluation plan in collaboration with an organization.

Following the release of the of competencies in 2010 I started to rethink how I wanted to approach my instructor. I was influenced by the connections I was beginning to make about the untapped potential of competency-based approaches that I had been exposed to in my work with the Faculty of Medicine and my expertise in assessing learning. In this slide, I provide the reference to the current Competencies for Canadian evaluation practice that are currently under revision and the published account of this journey. I am delighted by the similarities with the recently released AEA competencies.

Next let's talk about the why of this work. In 2017, Michelle and I co-guest edited an issue of the Canadian Journal of Program Evaluation as a tribute to Lyn – this was an impetus for some our current discussions and plans for generating evidence of the effectiveness of competency-based evaluation education. From 5 years of teaching the doctoral course embedding a competency-based approach I had plenty of anecdotal evidence and I was ready to be more systematic– here is the front of my course outline for last fall. Notice the role that competencies play front and centre in my course.

How – there are four assignments for this course and here I am showing you the 'final' reflective assignment. And in the bottom table I show part of the curriculum crosswalk that makes explicit the alignment among the course learner outcomes, the instructional activities, and the assessment strategies with the competencies that are the focus for the course. Next time, I will provide greater detail about how I plan and implement this approach.

This takes us to the so what? Competency-based education flips how educational initiatives are planned to focus on outcomes because it requires the instructor to work backwards, from desired outcomes to instructional activities, by first defining the outcomes and then creating the content and learning objectives for the course. Then each instructional activity is then carefully planned to yield the particular desired outcomes and the type of evidence influences the design of assessment methods. Competency-based education creates a comprehensive curriculum framework that can be used for planning educational programs with two results, first we can better able track

progression across coursework and practical experiences and second, we can identity empirically based quality indicators of the learning experience.

This is important because although Canada was at the forefront of identifying competencies and developing a designation, there remains work to be done in to align our educational initiatives with our desire for evaluator competence.

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Aligning Evaluator Competencies with KSA's to Understand Skill Level

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Citation

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Slide(s)

Overleaf

Description

At Eval17, I presented twice and attended no fewer than five other sessions on the proposed competencies for evaluators. It was by far my most discussed topic at the conference. At a Think Tank session on defining experience levels for evaluators, one conversation really stuck with me, so I must credit her work. Jacqueline Singh, an independent evaluator from Indianapolis, discussed her work with me. Out of sheer curiosity, she had taken some time to map the competencies to KSA's. She stressed that the mapping was just a product of her own thought process. That conversation led me to propose a new line of research related to the competencies and central to our work as educators.

The Essential Competencies for Program Evaluators: Self-Assessment Tool asks us to envision three levels of evaluation skill: Novice, Proficient, and Expert. Evaluators in training can self-assess their skill level using a basic rubric that aligns with experience, awareness, and ability to troubleshoot problems. While this tool is helpful to the individual, it does little to help assess the impact of a training program on development of essential competencies for evaluators.

I teach courses in Evaluation Studies at the University of Wisconsin-Stout that are part of a 14-credit graduate certificate. In 2014, I led a team of evaluators in a revision of the curriculum. We moved from a process-based approach to an evidence-based competencies approach. Our modularized curriculum is still closely aligned with the proposed competencies.

Theoretically, students who complete our certificate should have gained some level of skill in every competency and had the opportunity to exercise those skills through a capstone practicum. We utilize the self-assessment tool as a pre/post reflection tool and anecdotally students find it helpful in gauging their progress. Our coursework is largely applied, and there is no direct assessment of learning. So, we are left wondering exactly what KSA's our students acquired through their certificate training.

As educators, what level of skill do we expect our students to achieve upon graduation/completion? What expectations do we have about their ability to gain experience in all competencies? Our current program assessment tools are insufficient for understanding progress toward the competencies. Further, how do each of the proposed evaluator competencies align with specific KSA's?

At UW-Stout we have initiated a new line of research examining the connection between the competencies for evaluators, the KSA's needed to embody those competencies, and ultimately (and selfishly!) the learning outcomes of our certificate. It is our vision that operationalizing the competencies will allow us to develop an objective assessment tool and provide further steps

towards the professionalization of our field. That is some ways down the road though! Our first step is to gather qualitative data from evaluators. We are piloting this through a series of blog posts, each on an individual competency. This pilot collection of data will help us determine a base set of KSA's that we can begin testing within our certificate and graduate programs.

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UNIVERSITY OF WISCONSIN-STOUT

Aligning Evaluator Competencies with KSA's to Understand Skill Levels

Libby Smith, M.S.

EVALUATION 2017
From Learning to Action
#Eval17
November 6 – 11, 2017 | Washington, D.C.

COMPETENCIES FOR EVALUATORS WAS BY FAR **MY** MOST DISCUSSED TOPIC AT **#EVAL17**

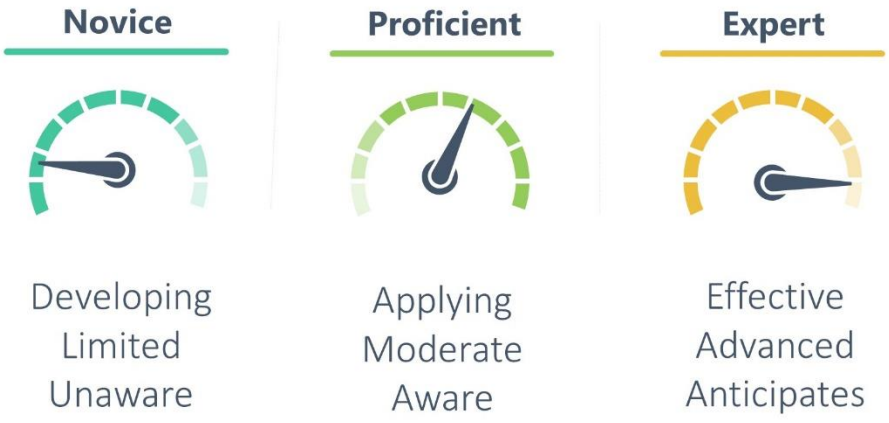
Evaluator Competency Domains

3

LEVELS OF EVALUATION SKILL

4

Stevahn, King, Minnema, & Ghere, 2005



New Courses & Modules

5

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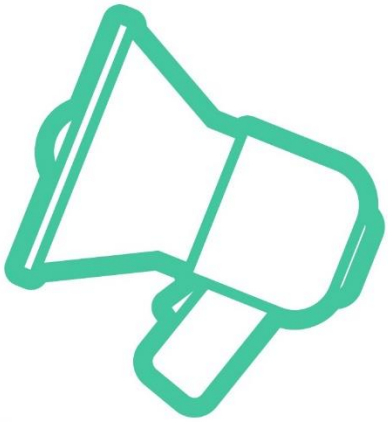
- PSYC-721 — Evaluation Ethics & Practice — 1 Credit — 5 Modules
- PSYC-722 — Project Management in Evaluation — 2 Credits — 7 Modules
- PSYC-723 — Research Methods in Evaluation — 2 Credits — 9 Modules
- PSYC-724 — Data Collection in Evaluation — 1 Credit — 3 Modules
- PSYC-725 — Data Analysis in Evaluation — 1 Credit — 1 Modules
- PSYC-726 — Evaluation Applications — 2 Credits — 9 Modules

14 Credits
8 Courses
45 Modules

PSYC - 728
Evaluation Practicum

7

Evaluation KSA's



Pilot Data Collection

THANK YOU

Let's connect!

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Experiential learning: How novice evaluators apply their studies in field work

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Thomas Pitts, R. (2018, March 20). Experiential learning: How novice evaluators apply their studies in field work. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

Slide(s)

Overleaf

To contribute to the working conference discussions of the nature of teaching evaluation, our presentation provided a brief summary of a recent article published in the American Journal of Evaluation on students' perceptions and experiences translating academic learning into evaluation practice (see Chouinard et al., 2017). In this exploratory inquiry, we utilized reflective journals, post-course interviews, and focus groups to consider the relationship between theory and practice for novice evaluators as they undertook experiential learning coursework and applied evaluation theory to the development and implementation of an evaluation plan for the first time. Three sensitizing concepts were found to affect student perceptions:

- Theory – evaluation theories (models and approaches), social science theories, paradigms, methodologies, and program theory (implementation and use);
- Context – community, social and cultural context and history, opportunities, constraints, policies and political agendas, evaluator role, institutional and program influences and information needs, and evaluation purpose; and
- Personal and cultural biographies – educational background, identity/ies, cultural and social location, experience, values, underlying predispositions, beliefs, and intuition.

Analysis resulted in three interconnected themes to characterize students' experiences. First, students expected that theory would provide a roadmap and framework to facilitate the evaluation process. Instead, students experienced dissonance as they struggled to use theory to inform practice, ultimately learning that additional knowledge, skills, and critical thinking were necessary to respond to contextual and interpersonal factors that require real-time modification of the evaluation plan.

Second, students struggled to manage the interpersonal and sociopolitical contexts of their evaluations. Since the evaluations were undertaken in small teams within the context of a graduate-level course, students were not only managing the evaluation process but also the team-based academic and interpersonal expectations for their evaluations as course projects. As novices and peers, students struggled to address team dynamics effectively without a prior experience or a pre-ordinate structure for cooperation or collaboration. This struggle to accommodate context and interpersonal interactions also manifest within their relationships with clients, as students felt their student status affected how clients perceived them as evaluators and how clients perceived the overall quality of the evaluation.

Third, students learned through the evaluation experience how to translate competence in theories they had previously studied academically into a hard-earned preliminary confidence in their praxis as novice evaluators. In applying theory, students nuanced their academic learning as they began to recognize the ways in which theory is supportive of the evaluative process even though is ultimately mediated by myriad contextual and personal factors. Thus, while theory provides students with a sharpened analytic lens for designing and implementing evaluative work, there is much within the practice of evaluation that simply cannot be learned within the traditional academic course setting.

These themes suggest a dynamic interplay between theory and practice, two domains that are often treated as separate and distinct. Consideration of the interconnected nature of these themes resulted in the identification of two meta-themes: the reification of theory among novice evaluators and the dialogic nature of the relationship between theory and practice.

Having initially studied theory divorced from its contextual application, evaluation students sought to apply theory as a prescriptive approach or checklist that, if followed, would produce findings of high technical quality. Commensurate with expectations for the novice learner

(Dreyfus, 2004), evaluation students approached their work from a rules-oriented perspective, failing to yet comprehend how various dimensions of context (e.g., of the program, the evaluation, the evaluation team, and the academic course) and their own personal, experiential, and cultural positionality exert inexorable influences on the nature and substance of evaluation processes and findings. Thus the apprenticeship-style approach to a guided first experience designing and implementing evaluation afforded students an opportunity to engage with the ways through which theory and practice influence one another – an interplay that is unavoidably unique, contextually-mediated, and ongoing throughout the evaluation and that occurs across various dimensions and factors that moderate the accuracy and appropriateness of the evaluation processes and findings.

We ultimately found that "evaluation is more than a technical craft requiring more than application of methodological rigor and skill" (Chouinard et al., 2017, p. 503). Indeed, much of the novice evaluator's learning centered on relational, cultural, and sociopolitical dimensions of evaluation practice that were as unexpected by the students as they are essential to acknowledging evaluation as a systematic inquiry that engages a multiplicity of needs, beliefs, values, and perspectives.

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EXPERIENTIAL LEARNING: HOW NOVICE EVALUATORS APPLY THEIR STUDIES IN FIELDWORK

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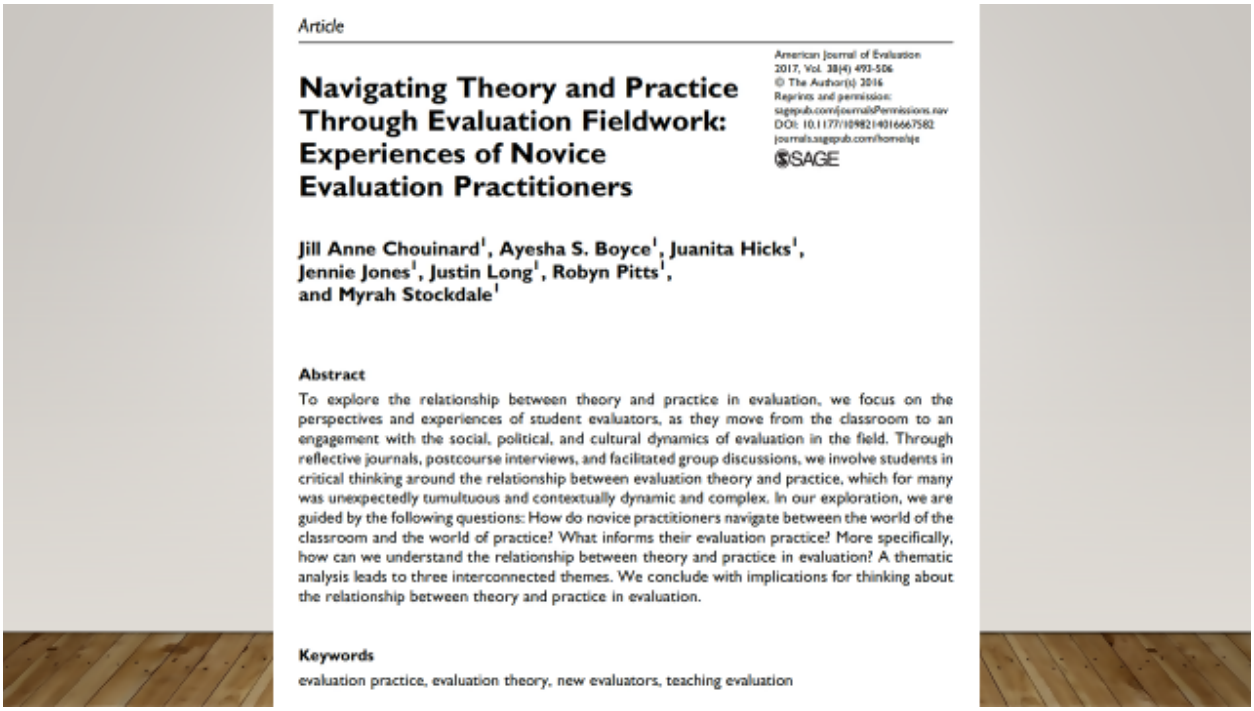

Article

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Navigating Theory and Practice Through Evaluation Fieldwork: Experiences of Novice Evaluation Practitioners

Jill Anne Chouinard[1], Ayesha S. Boyce[1], Juanita Hicks[1], Jennie Jones[1], Justin Long[1], Robyn Pitts[1], and Myrah Stockdale[1]

Abstract

To explore the relationship between theory and practice in evaluation, we focus on the perspectives and experiences of student evaluators, as they move from the classroom to an engagement with the social, political, and cultural dynamics of evaluation in the field. Through reflective journals, postcourse interviews, and facilitated group discussions, we involve students in critical thinking around the relationship between evaluation theory and practice, which for many was unexpectedly tumultuous and contextually dynamic and complex. In our exploration, we are guided by the following questions: How do novice practitioners navigate between the world of the classroom and the world of practice? What informs their evaluation practice? More specifically, how can we understand the relationship between theory and practice in evaluation? A thematic analysis leads to three interconnected themes. We conclude with implications for thinking about the relationship between theory and practice in evaluation.

Keywords

evaluation practice, evaluation theory, new evaluators, teaching evaluation

Sensitizing Concepts Affecting Student Perceptions

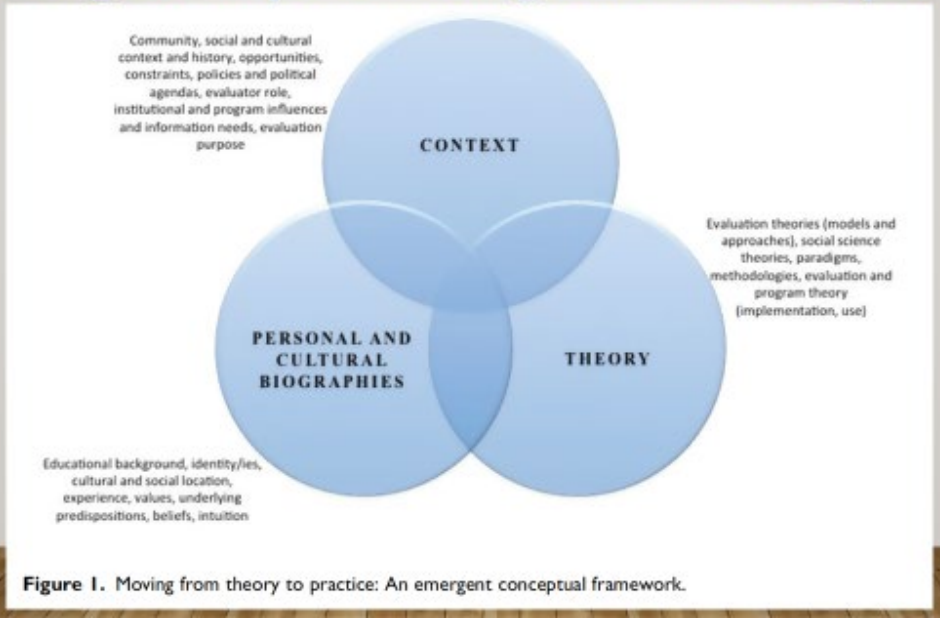
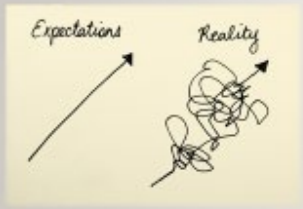


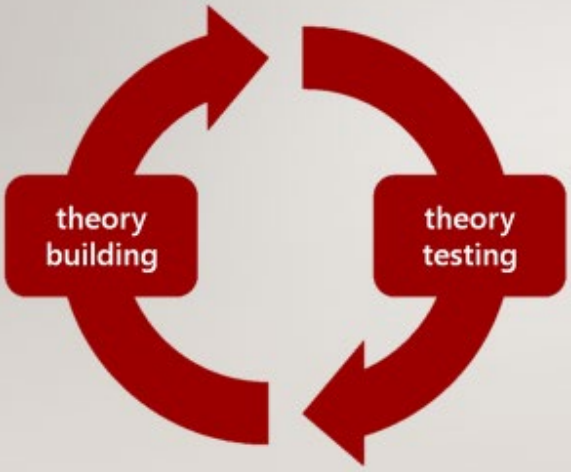
Figure 1. Moving from theory to practice: An emergent conceptual framework.

Main Themes (3)



Interplay (2)

Future Directions



Teaching Evaluator Competencies from the Affective Domain

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Citation

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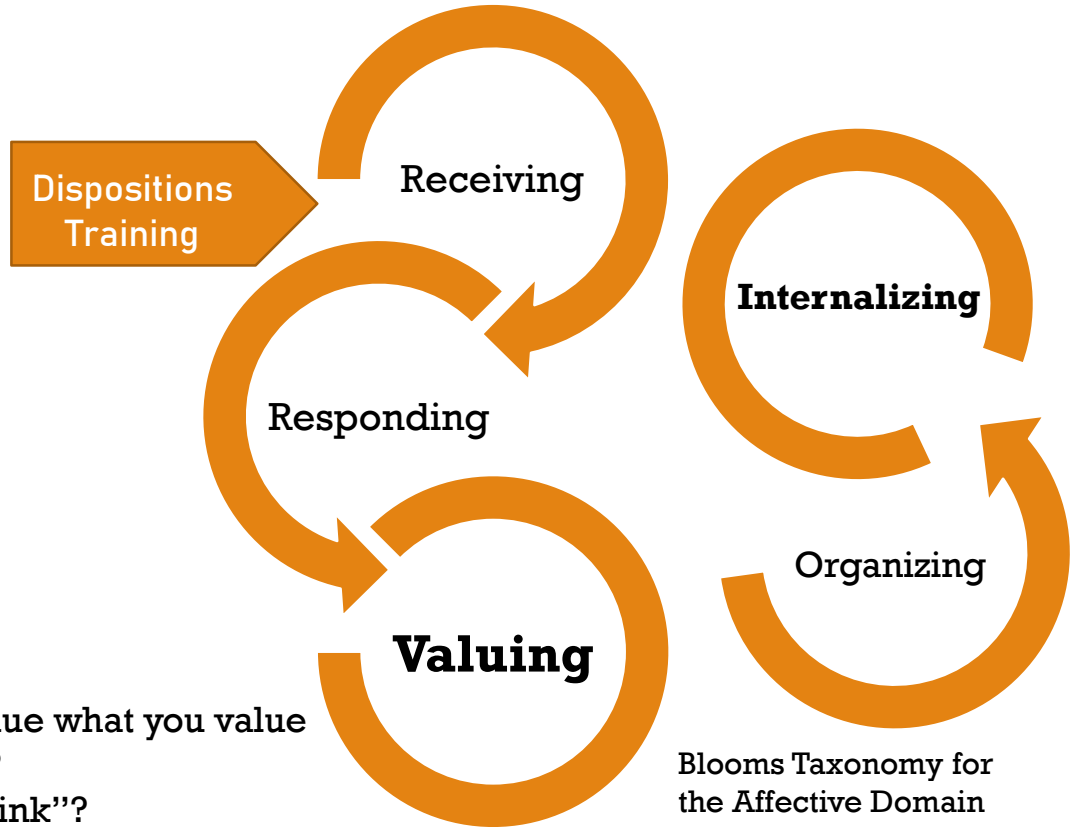
Slide(s)

Overleaf

Teaching Evaluator Competencies from the Affective Domain

Ethics and Cultural Competence are <u>not</u> obtained by simply mastering a particular body of knowledge or set of skills.

These are affective characteristics that describe a dispositional stance that must be nurtured.



Blooms Taxonomy for the Affective Domain

- ✓ No Guarantee student will value what you value
- ✓ Is there a correct disposition?
- ✓ Teaching students "what to think"?
- ✓ Personal vs Professional ethics/dispositions
- ✓ These things take time! The process is cyclical

Results from AEA Evaluator Competencies Survey for Ethics

Domain	Ethics Competency	Survey Results for Importance				
		Extreme	Strong	Moderate	Slight	Not at all
Professional	Act Ethically	85	13	2	0	0
Methods	Act Ethically	88	10	1	0	1
Context	Act and Interact Ethically	84	13	1	0	1
Planning	Act Ethically	83	13	3	0	1
Interpersonal	Act Ethically	84	12	3	0	1

36 people felt learning to Act Ethically was only moderately important
12 people indicated Ethics training was "not at all" important

Evaluator Training: Teaching affective competencies

The American Evaluation Association (AEA) emphasizes in its Guiding Principles that "evaluators should possess (or ensure that the evaluation team possesses) the education, abilities, skills, and experience appropriate to undertake the tasks proposed in the evaluation" (American Evaluation Association, 2004). Becoming an evaluator is not particularly difficult; you do not need a degree to conduct an evaluation; however, Stufflebeam (2001) affirms that training competent evaluators is important for the profession. Those desiring to receive training can do so in a variety of ways; they can take a single evaluation course or a series of related courses carefully designed to help future evaluators develop the skills and abilities that they will likely need to conduct quality evaluations (Davies & MacKay, 2014). And while training does not guarantee that an evaluation will be of high quality, the likelihood that mistakes will be avoided is increased with training and experience.

In 2015, a comprehensive effort by an AEA Task Force began work to development a set of evaluator competencies that describe the abilities and skills evaluators should possess in order to be considered competent (AEA Evaluator Competencies Task Force, 2017). The task force's efforts produced a list of specific competencies grouped in five domains: professional, methodology, context, management, and interpersonal. Within this list exist several competencies that are both difficult to teach and to assess. The purpose of this presentation was to articulate the challenges of training evaluators when a specific competency might best be described as an affective trait or disposition rather than knowledge, understanding, or skills.

Unlike cognitive skills and abilities, dispositions describe an individual's beliefs, attitudes, and perceptions (Anderson & Bourke, 2000). Two specific examples of affective traits within the list of AEA evaluator competencies include ethics and cultural competence. Ethics and cultural competence are not accomplished by mastering a particular body of knowledge or set of skills. These are affective characteristics that describe a dispositional stance that must be nurtured (American Evaluation Association, 2011). Evaluator dispositions are important because they influence how they act.

There are several approaches that might be taken when attempting to help evaluators develop dispositions like ethics and cultural competence. One framework that describes the process and helps us understand dispositions is Blooms taxonomy for the affective domain (Krathwohl, Bloom, and Masia, 1964). This hierarchy describes five phases: receiving, responding, valuing, organizing, and internalizing. Of these, three might best be described as process phases (i.e., receiving, responding and organizing). Students are taught what the dispositional goal is, they gain understanding of its particular components, and resolve issues of practice. This is where instruction occurs and has the most influence. The valuing and internalizing phases would best be described as outcomes. After learning about and reflecting on a specific disposition students begin to value (or not) that perspective. As individuals allow their developing dispositions to influence behavior they must resolve dissonance (e.g., practice vs theory problems) which determines how they internalize the principle (i.e., shapes their character). This then affects their behavior and govern their actions; for evaluators this might affect the evaluation approaches they choose to employ and the way in which they perform evaluation tasks.

One goal of evaluator training is to help students become aware of professional standards and expectations regarding important dispositions. However, because personal dispositions are constantly being refined and developed, it is common for an evaluator to understand the importance of a principle yet act contrary to it in specific contexts and situations. For example, while an individual might value cultural competence as a desirable disposition, they may (unintentionally or otherwise) dismiss, belittle and even persecute those who do not share their personal beliefs and perspectives. So while in theory diversity of thought and beliefs is valued, in practice homogeneity of thought and practice is encouraged. Likewise, evaluators might understand professional ethics standards yet justify behaving in a somewhat unethical manner given unusual circumstances or perceived need.

As evidence of this, while 80 to 90 percent of evaluators completing the evaluator competencies survey indicated they strongly believed acting ethically was an important competency for evaluators (AEA Evaluator Competencies Task Force, 2017), 10 percent or more felt it was only moderately important or not at all important. Of those who indicated that ethics was important, many may have been subject to a politically correct response set in that they recognize that most people believe acting ethically is a good thing, so they indicated their agreement even though they do not particularly hold that opinion nor do they act ethically in all situations. Oddly, being culturally competent and valuing diversity dictates that we must at times accept and respectfully honor the fact that other will not always share our beliefs and values.

In summary, it is clear that as a profession most would agree that evaluators who are trained to conduct evaluations are more likely to produce quality work. Yet, while many of the desirable evaluator competencies describe skills and abilities needed to carry out an evaluation, several others describe important professional dispositions that cannot be learned by memorizing a list of professional expectations. Many evaluator competencies fall within the affective domain and are dispositional stances that must be nurtured. Still, while the challenges for developing these dispositions for ourselves and other will take considerable time and effort, it is essential to the evaluation profession.

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How We Perceive Our Role as Teachers: Teaching Perspectives

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Citation

Lovato, C., & Pratt, D. D. (2018, March 20). How we perceive our role as teachers: teaching perspectives [PowerPoint]. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

Slide(s)

Overleaf

How We Perceive Our Role as Teachers: Teaching Perspectives

Chris Lovato, Daniel Pratt
The University of British Columbia

- Are there systematic differences in perspectives of teachers of evaluation? How do teachers' perspectives influence how evaluation is conceptualized?
- Teaching perspectives (Pratt et al, 2001) profile beliefs, intentions, responsibility, and commitment:
  - **Transmission** - present content accurately and efficiently
  - **Apprenticeship** - socialize learners into an existing community of practice
  - **Developmental** - develop and foster the growth of complex forms of reasoning
  - **Nurturing -** provide a balance of intellectual challenge and emotional support
  - **Social Reform -** encourage critique and change of the status quo
- Currently conducting pilot study using Teaching Perspectives Inventory to profile orientations of evaluation teachers; validated (Collins & Pratt, 2011).
- What patterns emerge? What perspectives are most and least common?
- Future Question: Are teaching perspectives related to a particular orientation/philosophy of evaluation?
- Teaching Perspectives website: http://www.teachingperspectives.com/tpi/

Contact: chris.lovato@ubc.ca

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Development of Interpersonal Competencies by Evaluators

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Citation

Rassel, S.M. (2018, March 20). Development of Interpersonal Competencies by Evaluators. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

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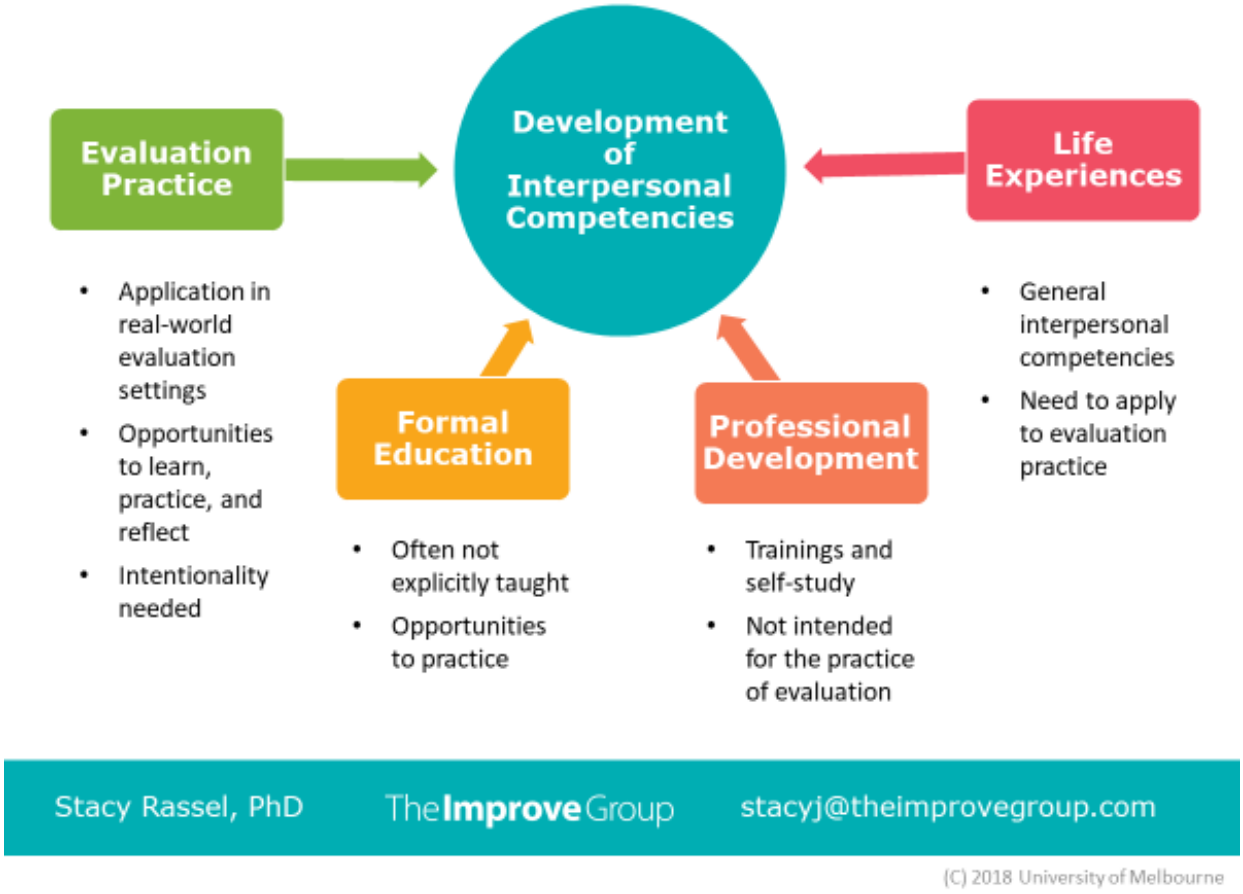

Description

The field of program evaluation has deemed interpersonal competencies as important and has included them as an essential competency domain for program evaluators; however, little is known about how evaluators develop interpersonal competencies. In a study consisting of interviews with 12 experienced evaluators, I attempted to better understand the ways in which interpersonal competencies are developed by experienced evaluators and where further exploration is needed. Overall, experienced evaluators reported four ways in which they developed their interpersonal competencies for practice, including through evaluation practice, formal education experiences, professional development opportunities, and life experiences.

All interviewees attributed their development of interpersonal competencies to evaluation practice. Interviewees asserted that for development to occur there is a need to apply competencies in real-world evaluation settings. This finding supports what evaluation scholars have encouraged in the literature: To use practical, hands-on experiences to intentionally teach interpersonal competencies (Alkin & Christie, 2002; Altschuld, 1995; Dillman, 2013; Gredler & Johnson, 2001; Morris, 1994; Nadler & Cundiff, 2009; Preskill, 1992; Trevisan, 2004; Wortman et al., 1980). In speaking about development through practice, interviewees expressed that development happened over time through opportunities to learn, practice, and reflect. As a result, interviewees pointed to the need for intentionality when developing interpersonal competencies through practice. This suggests individuals may need to actively identify interpersonal competencies in need of development, seek out opportunities to practice, solicit feedback, and participate in reflective practice. Looking across the different ways experienced evaluators have developed interpersonal competencies, evaluation practice was the most cited for the number of competencies developed and for the number of interviewees who experienced development in each specific competency. Based on the experiences of interviewees, it appears that a good amount of development of interpersonal competencies occurs after an individual has started to practice evaluation.

Most interviewees spoke about formal education experiences as a way they developed interpersonal competencies. Notably, several interviewees identified “effective communication” as an interpersonal competency developed through formal education experiences. Interviewees indicated that they had opportunities to take courses focused specifically on developing communication skills, or, through their coursework, they had many opportunities to develop these skills through team-based assignments, course papers, and presentations. For the remaining interpersonal competencies identified, each was mentioned by only one or two interviewees, indicating there was minimal overlap in interviewee experiences when developing these competencies through formal education experiences.

In addition, when developing these interpersonal competencies through formal education experiences, interviewees explained that the competencies were not explicitly taught, but were practiced through team-based activities and assignments. Based on interviews, it appears that interpersonal competencies are often not explicitly taught in formal education settings, but rather students may be exposed to opportunities to practice interpersonal skills. It is unknown if these opportunities were intentionally constructed to develop interpersonal competence or if it was happenstance. Either way, interviewees reportedly did not receive training on interpersonal competencies prior to practice. For example, interviewees did not indicate they were taught effective communication strategies before completing team-based assignments.

Overall, findings from this study support what was discovered in previous studies (Davies & MacKay, 2014; Dewey et al., 2008; Dillman, 2013; Kaesbauer, 2012)— evaluators do not seem to be developing many of the essential interpersonal competencies in formal degree programs. Despite this, there seem to be opportunities within courses to develop interpersonal competencies through practice, but what is missing is the initial instruction. If interpersonal competencies were intentionally addressed within course curriculum, the opportunities for students to then practice or apply what they have learned may already exist through course activities and assignments. For example, if first given instruction on collaborating with others, students could then apply what they learned when doing a team-based activity. Based on the possibility of existing opportunities to practice and the limited instructional time available to prepare students for practice, intentionally embedding interpersonal competency development into existing courses could be a promising topic to explore further.

Over half of the interviewees also identified professional development opportunities through trainings and self-study as a way they developed their interpersonal competencies. Since evaluators enter the field in many ways, evaluation-specific professional development opportunities may be a good way for evaluators to address their competency development needs. This study found that few interpersonal competencies were developed through professional development opportunities, and, when they were, the opportunities were not specifically for the practice evaluation. This may point to a need to further explore the professional development opportunities that exist for evaluators to develop interpersonal competencies and who is engaging in these opportunities.

Life experiences were also a way a couple of interviewees reportedly developed interpersonal competencies. These interviewees acknowledged that general interpersonal competencies could be developed through other life experiences that could then be applied to evaluation practice. Although the field cannot shape the life experiences of evaluators, it is important to acknowledge that individuals may well bring competencies to their practice that they have developed outside of evaluation-specific training and practice.

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Research Evidence and Lessons Learned Using Accreditation

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Citation

Kallemeyn, L. (2018). Research evidence and lessons learned during accreditation. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

Slide(s)

Overleaf

Research Evidence and Lessons Learned Using Accreditation

9 Systematic/Literature Reviews on Accreditation

teacher education, higher education, dental education, health care, primary care, family medicine

Description of Accreditation Processes (7)

Voluntary (3)
Customization (3)
Explicit competencies/outcomes/norms (3)
Internal self-study → peer review (3)

Consequences (7)

Lack of research on impact for quality (5)
Inappropriate homogenization (1)
Promotes change in organizations (1)
Positive link to professional development (1)
Marketing tool (1)

Facilitators (7)

Positive perceptions from professionals (3)
Appropriate/Agreed upon competencies (2)
Using multiple measures (1)
Appropriate assessments (1)
Internal (1)

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Realising the promise and avoiding the pitfalls of evaluation training via webinars

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Citation

Wingate, L. (2018, March 20). Realising the promise and avoiding the pitfalls of evaluation training via webinars. Paper session presented at the Working Conference: Charting the Future of Evaluation Education, University of Minnesota, St. Paul, MN.

Slide(s)

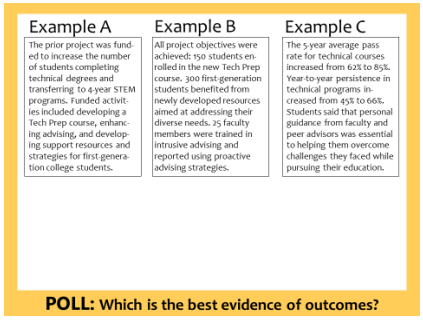
Overleaf

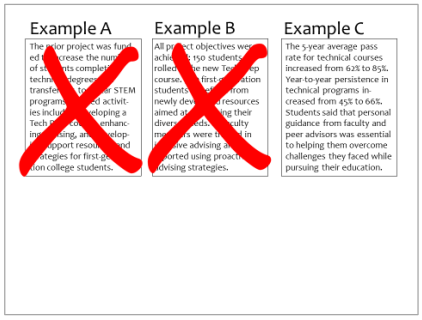
Realizing the Promise and Avoiding the Pitfalls of Evaluation Training via Webinars

Lori A Wingate | Western Michigan University
Director of Research, The Evaluation Center | Director & Principal Investigator, EvaluATE

As the issue of evaluator competence gains traction, there is a growing need for accessible evaluation training. Webinars (live, web-based training) are one means of addressing the increasing demand. However, too many webinars fail to be delivered in a learner-focused way and therefore fall short of their potential to advance evaluation competence. Drawing on instructional design principles and neuroscience and nearly a decade of experience providing evaluation training webinars through EvaluATE, I use three strategies that help realize the promise and avoid the pitfalls of webinars as a medium for evaluation training

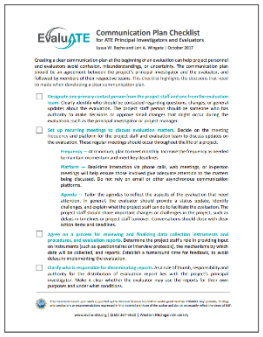
1 Include opportunities for participants to try out what they are learning. Exercises must be relatable, strike the right balance of being meaningful yet not too complex, and include explanations of why right answers are right and wrong answers are wrong.

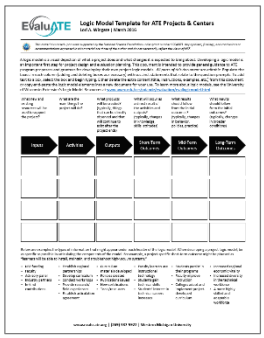


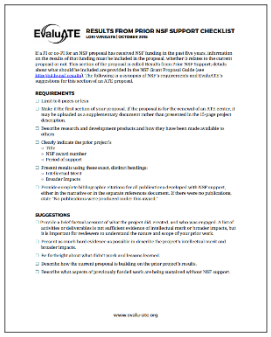


2 Use multiple strategies to maintain participants' interest. Using the software's interactive tools, having visually appealing slides, and delivering content in a personal and relatable manner help keep the attention of easily distracted participants.

3 Provide participants with support materials to help them apply what they learned in the webinar. Checklists, templates, and other job aids put webinar content at the participants' fingertips when they get back to work.







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Implementation and Challenges of Evaluation Education in Taiwan

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Citation

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Slide(s)

Overleaf

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Implementation and Challenges of Evaluation Education in Taiwan

Shu-Huei Cheng

Associate Professor, Department of Education & Graduate Institute of Educational Policy and Administration, National Taiwan Normal University

Paper presented in the working conference to "chart the future of education evaluation and training"
U of Minnesota, March 20, 2018

Abstract

- This study investigated implementation and challenges of evaluation education for school educators in Taiwan. Document analysis and a reflective case study were conducted.
- The policy context of educational evaluation in Taiwan was first introduced.

Abstract

- Subsequently, the designs of the educational evaluation courses offered by Taiwanese national universities were investigated. Additionally, analysis of a reflective case study was performed on the basis of the author's experiences as a university evaluation instructor. Finally, the findings of evaluation education were presented along with a discussion.

Agenda

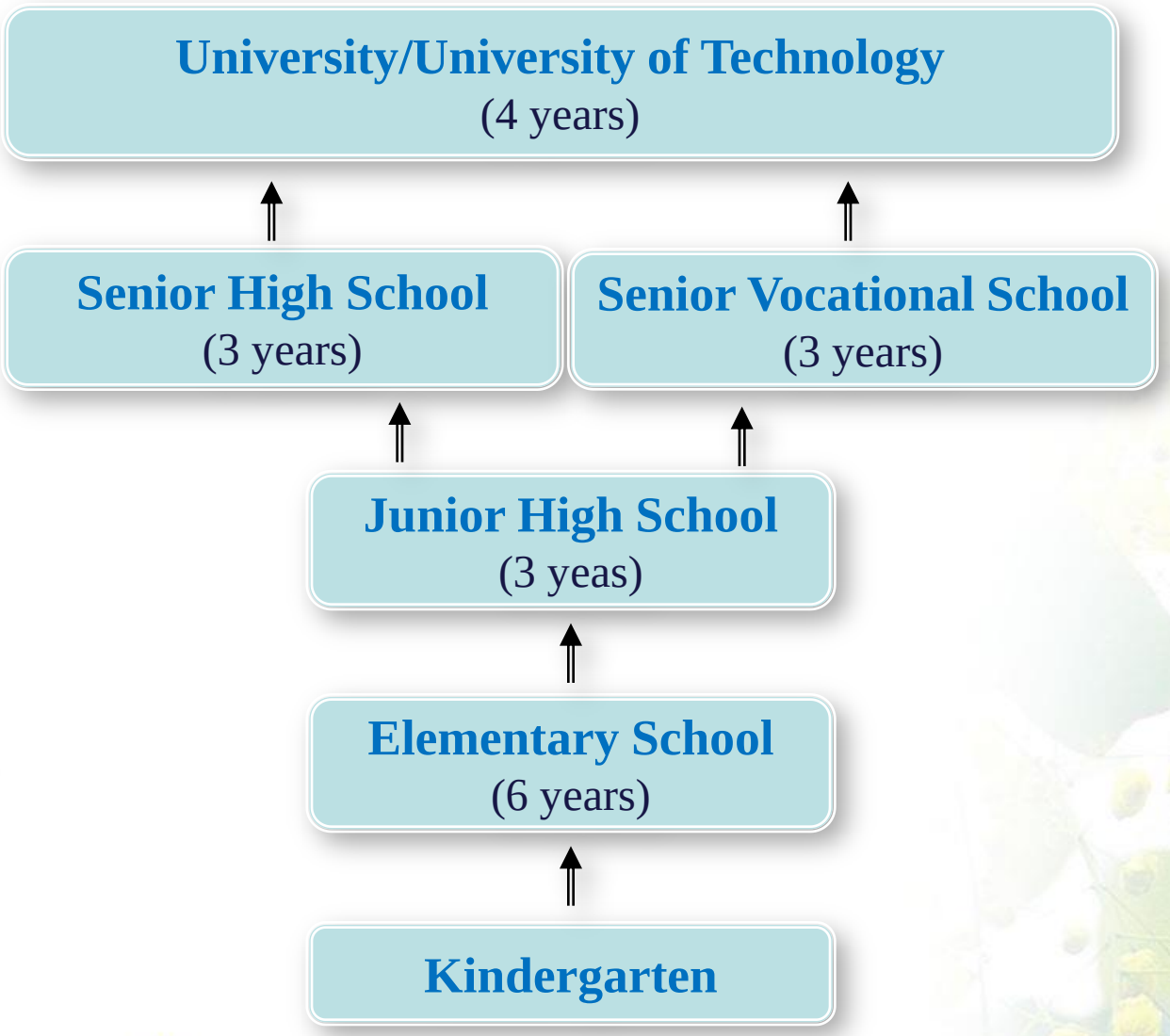
- Context of Taiwanese educational system
- University-based educational evaluation courses
- Challenges of evaluation education

Taiwan

Population: 23.5 million (2016); in east Asia

http://www.ntl.edu.tw/ct.asp?xItem=16161&CtNode=1495&mp=14

Educational System



University-Based Educational Evaluation Courses

- Document analysis:
  - 12 public universities with departments of education
  - Long standing systematic evaluation education
- Purpose:
  - Develop educators' evaluation knowledge, skills, and attitude
- Learner:
  - Students at college, master, or doctoral levels; pre-service or in-service educators .
  - Evaluation practitioners and consumers

University-Based Educational Evaluation Courses

- Faculty: Scholars
- Content: Evaluation concept, approaches, practices, and issues (i.e., ethics, meta-evaluation)
- Structure: One or two courses in one program; optional or required courses
- Pedagogy: Lecture, discussion, and research or practical projects

Challenges of Educational Evaluation

- Cultivate into positive attitude toward evaluation
- Link theory (most Western dominated) and local practices

Thanks for your listening.

Looking forward to your feedback.

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Producing Reflective Evaluators: How Do We Infuse Reflective Practice into Evaluator Education?

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Slide(s)

Overleaf

Description

What is Reflective Practice (RP)?

Reflective Practice Defined:
One of Stevahn, King, Ghere, and Minnema's original 2005 Essential Competencies for Program Evaluators:
"Being acutely aware of personal evaluation preferences, strengths, and limitations; self-monitoring the results of actions intended to facilitate effective evaluation studies; and planning how to enhance future endeavors" (p. 46).
A way to enhance self-awareness, promote professional growth and development, improve ethical practice, and to facilitate dialogue and learning in organizations (Patton, 2011; Preskill & Torres, 1998; Smith, Barlow, Skolits, & Peters, 2015).

Why is RP Necessary in Evaluator Education?

Why RP is Necessary:
New evaluators are often faced with the difficult task of learning evaluation theory simultaneously while learning how to practice, and oftentimes this learning is done on **autopilot**, with little time for critical reflection on either the building blocks of evaluation theory or emerging practice-based project dilemmas.
However, reflection is a tool that necessarily helps us to:

- Critically look at our work (daily and over time) and competence
- Critically examine the evaluand(s), including context, theory of change, assumptions, and politics.
- Enhance organizational learning and evaluation capacity building

It is important to be able to take a step back from practice, and from our evaluations as they unfold, in order to not only understand it better ourselves (new or seasoned), but also to **facilitate learning in others** (Preskill, 2008).
Recently, during the 2017 revision process, **RP has been removed** from the revised list of essential competencies. However, RP should not be forgotten, especially given its apparent importance for not only self-enhancement, but facilitating evaluative thinking in organizations.

How Can I Get My Students to Reflect?

Infusing RP into Evaluator Education: The intent is for reflective practice to be purposeful, so an explicit awareness of WHAT RP IS is the first step. Then, these are some reflection activities I use in my classroom:

Reflection Forums – Online forums for students to openly discuss their opinions about pivotal topics in the evaluation field, including points of contention in evaluation. This includes topics like discussing **the role of the evaluator** as geared toward accountability or promoting change in an organization, or the role of stakeholder involvement in the process.

Evaluation Practitioner Journal – Students are required to keep a weekly reflection journal explaining the milestones that they have accomplished in their first-year evaluation project, assessing their personal professional competencies as well as areas for **professional development**.

Discussion Prompts – As students read for class (articles, theoretical approaches), they are required to respond to prompts that ask them to critically think about how they can use what they read in practice, and how the reading matches up with their own **evaluation philosophy**. This helps the topics to come to life for the students, thinking through the ins and outs of their own decisions and ideas in the evaluation process.

The DATA Model for Reflection – Having students reflect on project-based dilemmas, either during the fact or afterwards, by walking through the DATA model for reflective practice (Smith et al., 2015), is a great tool to help them understand their assumptions in their thinking and come up with practical solutions. Using **the DATA model** requires the practitioner to think through a detailed (D)escription of the dilemma being faced, then critically (A)nalyze the potential reasons for their dilemma. After analysis, they (T)heorize possible solutions to the dilemma and (A)ct, based on critical reflection.

Reflective Practice Moving Forward
What's Next for RP?
Evaluator education is an important topic, and in line with our own reflection as evaluators on our educative practice at this conference, it is astutely fitting that we ensure that that same level of critical thinking is passed on intentionally to future professional evaluators. So, here are some questions for further pondering:

- What is the role of reflective practice, the lost competency domain, in evaluator education and beyond?
- In what other ways can we infuse reflection into evaluator education?
- How do we produce purposefully reflective evaluators?

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Producing Reflective Evaluators:

Infusing Reflective Practice into Evaluator Education

Tiffany Smith, Ph. D.

What is Reflective Practice (RP)?

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One of Stevahn, King, Ghere, and Minnema's original 2005 Essential Competencies for Program Evaluators:

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Why is RP Necessary in Evaluator Education?

Why RP is Necessary:

New evaluators are often faced with the difficult task of learning evaluation theory simultaneously while learning how to practice, and oftentimes this learning is done on **autopilot**, with little time for critical reflection on either the building blocks of evaluation theory or emerging practice-based project dilemmas.

However, reflection is a tool that necessarily helps us to:

- Critically look at our work (daily and over time) and competence
- Critically examine the evaluand(s), including context, theory of change, assumptions, and politics.
- Enhance organizational learning and evaluation capacity building

It is important to be able to take a step back from practice, and from our evaluations as they unfold, in order to not only understand it better ourselves (new or seasoned), but also to **facilitate learning in others** (Preskill, 2008).

Recently, during the 2017 revision process, RP has been removed from the revised list of essential competencies. However, RP should not be forgotten, especially given its apparent importance for not only self-enhancement, but facilitating evaluative thinking in organizations.

How Can I Get My Students to Reflect?

Infusing RP into Evaluator Education:

I provide students with multiple opportunities for personal reflection:

Reflection Forums – Online forums for students to openly discuss their opinions about pivotal topics in the evaluation field, including points of contention in evaluation. This includes topics like discussing the role of the evaluator as geared toward accountability or promoting change in an organization, or the role of stakeholder involvement in the process.

Evaluation Practitioner Journal – Students are required to keep a weekly reflection journal explaining the milestones that they have accomplished in their first-year evaluation projects, assessing their personal professional competencies as well as areas for team and personal professional development.

Discussion Prompts – As students read for class (articles, theoretical approaches), they are required to respond to prompts that ask them to critically think about how they can use what they read in practice, and how the reading matches up with their evaluation philosophy. This helps the topics to come to life for the students, and helps to put them in the shoes of an evaluator, thinking through the ins and outs of their own decisions and ideas in the evaluation process.

Utilizing the DATA Model for Reflection – Having students reflect on project-based dilemmas, either during the fact or afterwards, by walking through the DATA model for reflection (Smith et al., 2015), is a great tool to help them understand their assumptions in their thinking and come up with practical solutions. Using the DATA model requires the practitioner to think through a detailed (D)escription of the dilemma being faced, then critically (A)nalyze the potential reasons for their dilemma. After analysis, they (T)heorize possible solutions to the dilemma and (A)ct, based on critical reflection.

Reflective Practice Moving Forward

What's Next for RP?

Evaluator education is an important topic, and in line with our own reflection as evaluators on our educative practice at this conference, it is fitting that we ensure that that same level of critical thinking is passed on intentionally to future evaluators. So, here are some questions for further pondering:

- What is the role of reflective practice, the lost competency domain, in evaluator education and beyond?
- In what other ways can we infuse reflection into evaluator education?
- How do we produce **purposefully reflective** evaluators?

For questions or to share your thoughts about this topic, please contact me at smithtif@uwstout.edu!

Job Aids: Bridging the Gap Between Evaluation Theory and Practice

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Slide(s)

Overleaf

Job Aids: Bridging the Gap Between Evaluation Theory and Practice

Problem

The skills needed to translate knowledge into effective practice are often not adequately developed after evaluation courses and trainings.

What is a job aid?

Job aids distill complex information into an easy-to-understand format. Job aids serve as information repositories of relevant content and procedural steps to increase the likelihood individuals effectively complete a specific task (Willmore, 2006).

Student "job" aids should help students complete students specific tasks (e.g., remembering and comparing theorists).

How do job aids solve the problem?

- Reinforces formal training
- Help individuals successfully apply their existing knowledge in practice
- Help individuals understand complex concepts and connections (e.g., evaluation theory comparison chart)

Ideas on How to Use Job Aids in Education

- Provide students with at least one job aid as part of each course or training
- Ask students to create job aids to help them understand the content
- Use job aids while you teach to help students understand the complex components and connections between concepts

Examples of Job Aids

Checklist
(e.g., utilization-focused evaluation checklist, evaluation question checklist)

Template
(e.g., logic model, report)

Decision table/ Troubleshooting diagram
(e.g., statistical analyses, solutions to low survey response rate)

Process table or flow chart
(e.g., sample selection process, choose statistical analyses)

Model/exemplar
(e.g. evaluation report)

Quick reference guides
(e.g., evaluation theorist tree or river, types of data collection methods)

Worksheet
(e.g., calculating population size)

Script
(e.g., interview script)

Online presentations hosted by University of Melbourne

To make the community more accessible, the University of Melbourne agreed to organise the a series of online conference sessions via Zoom in April 2018. Table 3 outlines the presentation schedule of this sessions followed by the submitted presentation (presentations that were repeated in the face-to-face session have not been included).

Table 3. Online Presentations Schedule

Date	First Name	Last Name	Title
Friday 6 April	Susan	Staggs	Applying data-driven insights from the field of psychology to evaluation education
	Anne	Seraphine	Aligning the "Whats"--"What should be taught", "What is taught", and "What is measured": Issues of Evaluation Program Assessment using ePortfolios
	Bianca	Montrosse-Moorhead	The CHecklist for Evaluation-Specific Standards (CHESS) Project
Monday 9 April	Chari	Smith	Building Buy-In
	Melissa	Chapman Haynes	A cognitive apprenticeship model of developing evaluation practitioners
Tuesday 10 April	Lauren	Wildschut	Insights into current issues of M&E training in South Africa
	Cheryl	Poth	Realizing a competency-based approach within evaluation education: An illustrative example of a curricular crosswalk from a Canadian doctoral course
	Libby	Smith	Aligning Evaluator Competencies with KSAs to Understand Skill Level
Wednesday 11 April	Kim	Castelin	Assessing Learning Outcomes in Online Learning for Monitoring and Evaluation Compared to Traditional Face to Face Workshops
	Michelle	Searle	Competency-based approaches as a pedagogical framework for evaluation

Applying data-driven insights from the field of psychology to evaluation education

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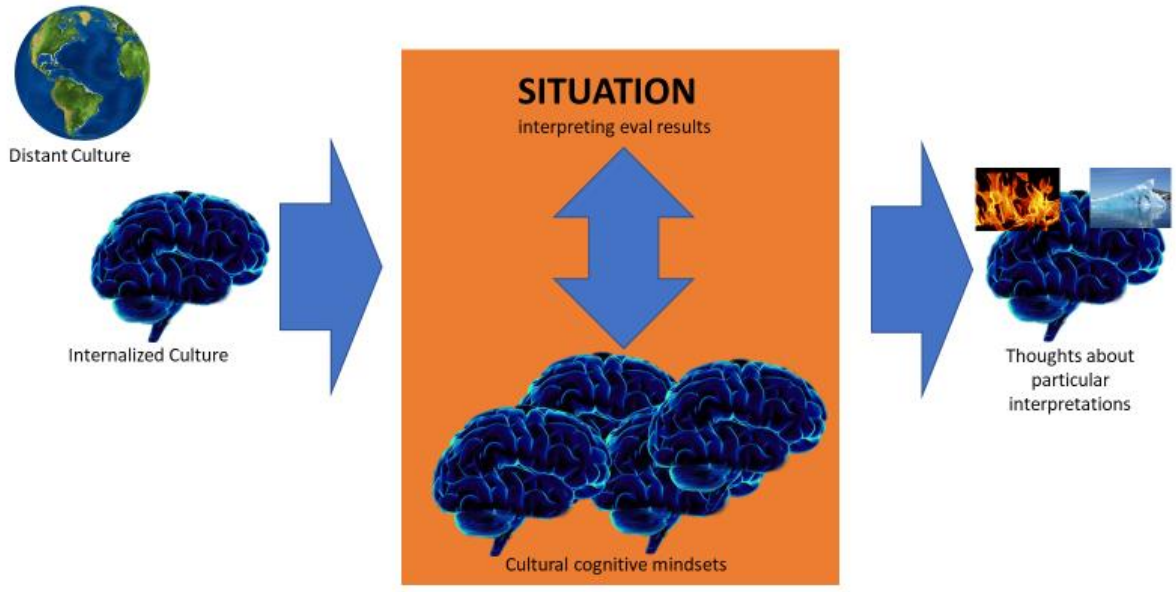
Citation

Staggs, S. (2018, April 6). Applying data-driven insights from the field of psychology to evaluation education. Presented at the Online Working Conference: Charting the Future of Evaluation Education, hosted by The University of Melbourne.

Slide(s)



Description

A foundational question in evaluation education in my mind is "how can we apply research from related disciplines to improve evaluation education?" One of the ways we can do that is to infuse psychological research into our teaching of things like culture and data interpretation. A review of documents on culturally responsive evaluation (e.g., American Evaluation Association, 2011; Centers for Disease Control and Prevention, 2014) indicates that our conceptualization in evaluation of culture is as something monolithic that people HAVE like a disability or an sexual orientation, or something that people belong to, such as an ethnic group. But culture is not some monolithic, acontextual thing. Culture is largely a process.

This graphic depicts the data-verified **culture as situated cognition theory** (e.g., Oyserman, Kemmelmeir, & Coon, 2002; Oyserman, 2016, 2017; Oyserman, Sorenson, Reber, & Chen, 2009). Take the example of a common situation in evaluation – interpreting the results of data analysis. Basically, culture influences individual thought, feeling, and behavior dynamically in real time through situations, and different cultural mindsets "emerge from moment-by-moment interaction

with the environment rather than proceeding in an autonomous, invariant, context-free fashion" (Smith & Semin, 2004, p. 56).

What we often teach as culture is what psychologists refer to as distant culture (ethnic identity, age, ability, sexual orientation). What we don't teach is the process through which culture influences behavior. Internalized culture, which influences how we interpret situations, causes cultural constructs to be more or less accessible based on moment-by-moment situational cues. In the process of interpreting results, cultural constructs such as "these findings make members of this culture look bad" may come to the mental fore or recede and be replaced by other culturally relevant constructs several times during the data interpretation process or during dialogues with colleagues about the meaning of data. Oyserman (2016, p. 94) says that these "momentarily accessible (cultural) mindsets matter," because they influence cognitive processing, judgment, and reasoning" – all things that are critical to quality evaluations.

If data interpretations and related discussions elicit emotional cultural thoughts such as "these findings revictimize the victims," such situations may feature what psychologists call "hot" cognition, or emotion-infused cognition, which is contrasted with cold, rational, emotion-free cognition (e.g., Abelson, 1963; Kunda, 1990; Metcalfe & Mischel, 1999). Culturally driven thoughts are often hot rather than cold. We need to be aware of these psychological constructs so we'll know when emotion is influencing our evaluative processing, judgements, and reasoning. And we need to teach culture as situated cognition in evaluation if we want to apply research on culture to evaluation in a sufficiently subtle manner.

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Aligning the “Whats”: Issues of ePortfolio Program Assessment

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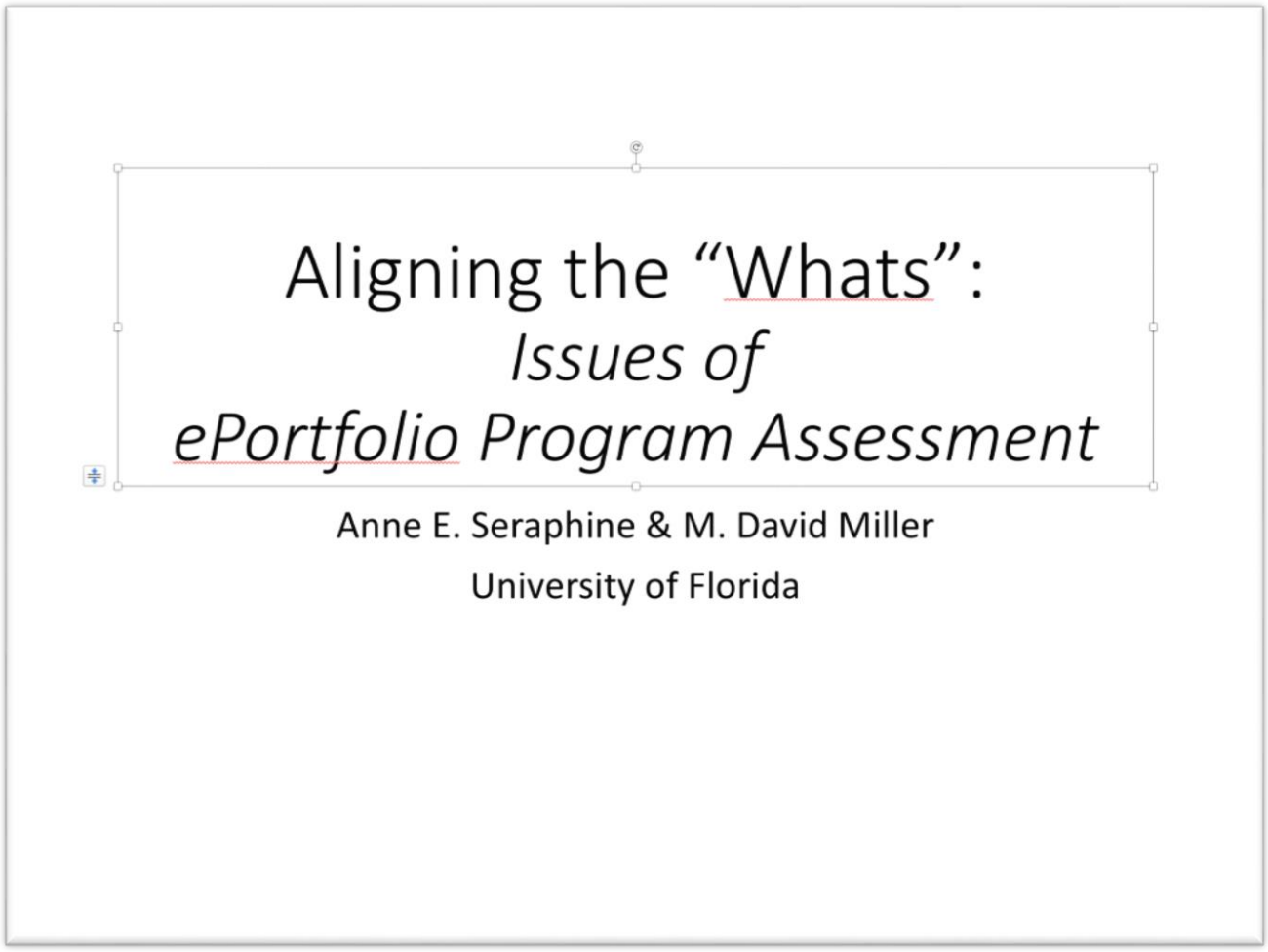
Citation

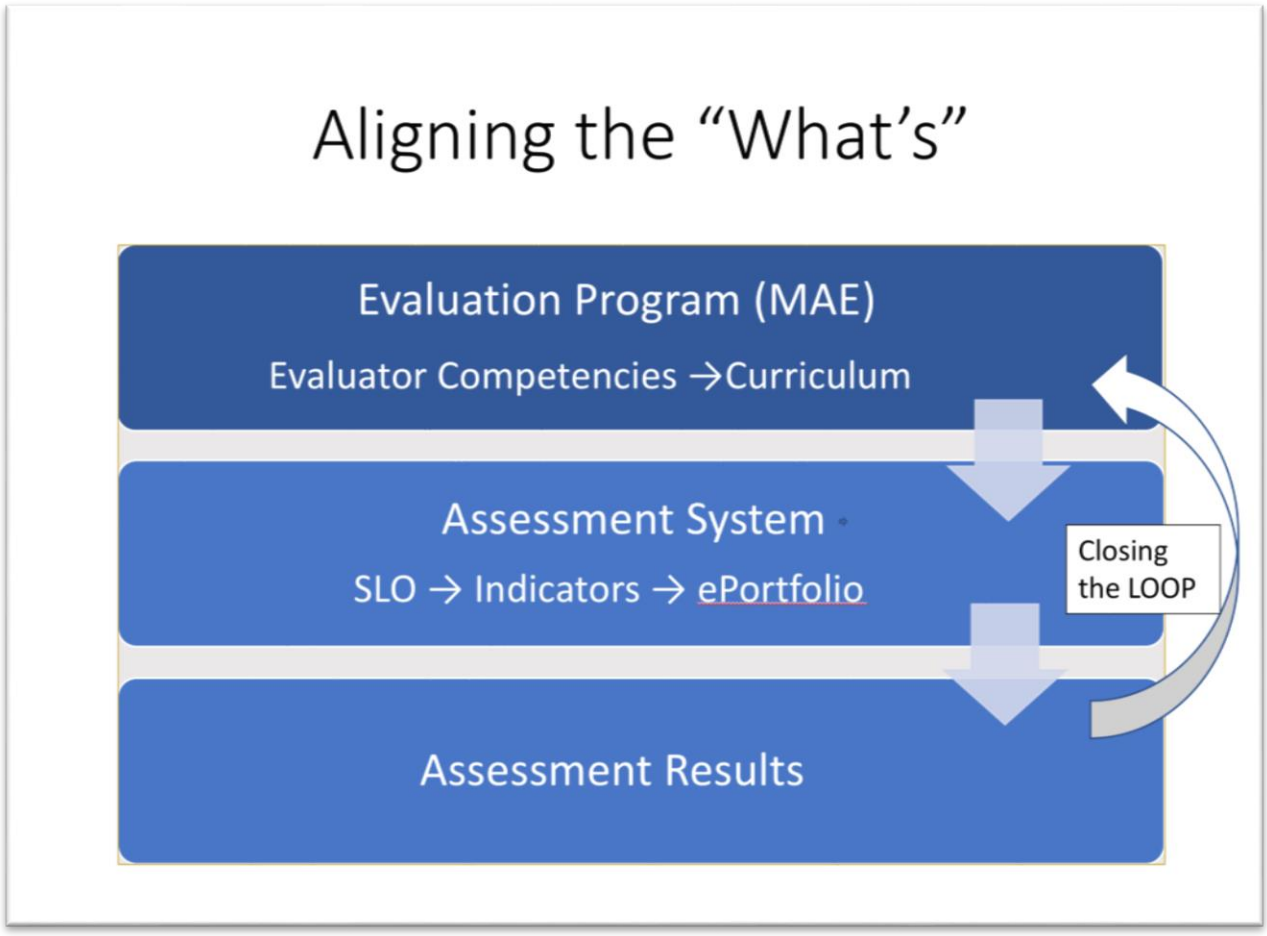
Seraphine, A.E. & Miller, M. D. (2018, April, 6). Aligning the “Whats”: Issues of ePortfolio Program Assessment. Presented at the Online Working Conference: Charting the Future of Evaluation Education, hosted by The University of Melbourne.

Slide(s)

Overleaf

Slides:


Aligning the "Whats":
Issues of
ePortfolio Program Assessment
Anne E. Seraphine & M. David Miller
University of Florida



Description:

At the University of Florida (UF), my colleague, M. David Miller, and I have been in the process of developing an e-Portfolio assessment system for our master's level evaluation program. Program-level assessment systems at most institutions of higher education, including (UF), consist of both student learning outcomes (SLOs) and their indicators, as required by our regional accreditor, the Southern Association of Colleges and Schools (SACS), and Florida's Academic Learning Compacts (ALC) (Brophy, 2017). Under Florida's ALC each of the following areas should be covered by a SLO: knowledge, skills, and professional behavior. ALC categories apply well to a program designed to train evaluators, particularly given that the curriculum is based on the common core competency domains (King & Stevahn, 2015), which includes domains such as, professional focus, conducts and manages projects skillfully, and the like. The

identification and selection of a specific set of evaluator competencies is hardly a straightforward task; and as expected, is an area still in need of further research and discussion (Christie, 2014; Dewey, et. al., 2008, King & Stevahn, 2015, LaVelle & Donaldson, 2015). But for the purposes of brevity, we set aside discussion of issues related to evaluator competences and curriculum. Instead we turn to our focus.

The development of our program's assessment system is ongoing, as we attempt to address various validity issues as they arise. The focus of this presentation is a brief introduction of the various validity issues specific to an ePortfolio assessment system as applied to a master's level evaluation curriculum. It is likely a number of these issues apply to evaluation programs in other settings.

Our assessment system was designed to provide data to monitor student growth and accountability, and to for program improvement, as way to close the assessment loop, which requires alignment (Suskie, 2009). The accompanying slide represents the alignment of evaluator competencies ("What should be taught?"), with the curriculum (What is taught?), with the assessment system (What is measured?"), and with the use of results (What should be done with the results?). In other words, the slide addresses the alignment of the *Whats*: *What* should be taught, *What* is taught*, What* is measured, and *What* is done with the results. Most validity issues pertain to this goal of alignment: The alignment of the *Whats*.

Part of the *what* of assessment is the *how*; in other words, how should one approach assessment? As mentioned earlier, we decided to adopt an ePortfolio approach to assessment. According to Eynon & Gambino (2017) ePortfolios, if done well, have a positive influence on student learning and institutional changes. For example, e-Portfolios encourage students to reflect on and integrate their learning across the curriculum. The use of ePortfolios benefits a program, promoting increased program integration and adaptivity to change (Chen & Light, 2010; Eynon & Gambino, 2017).

When adopting an ePortfolio approach, assessment occurs twice: Once, when the artifact is first assigned in a course and is graded; and second, when the artifact is included in the portfolio and contributes to an overall assessment. The question is to what extent do these results provide meaningful interpretations for student accountability and program improvement? Clearly these questions point to issues of validity.

At the level of individual indicators, the question is to what extent do our program's SLOs and their indicators align with the curriculum as taught. Here the concern is to ensure adequate coverage of the domain of interest, which according to the Standards for Educational and Psychological Testing (2014) calls for content-based evidence: such as curriculum mapping of SLOs and their indicators; and the use of content experts, both evaluation practitioners and scholars, to evaluate the assessment-curricular alignment. Both strategies would work in tandem to support the interpretability of assessment results.

Because an ePortfolio is likely to rely on performance-based indicators, it is likely that scoring rubrics would be used, which raises a number of issues. The selection of rubrics is the first important consideration: Should one use a holistic or analytic rubric? According to Rhodes and Bergeron (2017), one advantage of the analytic type is they provide detailed feedback and can be used as a teaching tool, if provided to students in advance. Moreover, analytic rubrics are preferred for most high stakes assessment situations. Finlay and Rhodes (2013) recommended the adoption of the VALUE rubrics, which were created by an interdisciplinary team of faculty and educational experts to be applied within and across academic disciplines in a college or university setting. VALUE rubrics have been developed for 16 different student learning outcomes, show interrater reliabilities, ranging from .50 to .84 (MConnell & Rhodes, 2017) and as we discovered, they can be easily tailored to fit evaluation SLOs.

One concern with use of scoring rubrics is how to assign scores, when a set of rubrics treats as excellent, those student responses that lack imagination or evidence of critical thinking? So, the question is to what extent does one use professional judgement in conjunction with one's use of rubrics? How does this use of professional judgement affect rubric reliability, particularly interrater reliability?

One important aspect of assessing evaluation students of is the extent to which they attain the skills and behaviors of a professional evaluator, which we believe is best accomplished by using performance assessments via the ePortfolio approach. Performance assessments aremore likely than other types of assessments to elicit the response processes and behaviors expected of a practicing evaluator. One issue is how does one collect response-based evidence that would support that evaluation specific reasoning has been demonstrated by students' responses. Validity studies could begin with the identification of specific response processes of those who possess evaluator core competencies as outlined by King & Stevhan (2015) and others (Christie, 2014; Dewey, et. al, 2008; Galport & Azzam, 2017; LaVelle & Donaldson, 2015).

The aim of this summary and slide is to provide a framework to guide the identification of program-level assessment validity issues. Addressing such issues is one step toward achieving an alignment of the Whats." Only then will a program-level assessment system ensure student learning and accountability; effectively close the loop, resulting in program improvement and optimal university training for future evaluators.

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A necessary step toward professionalization and evidence-informed practice: The CHESS project

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Citation

Montrosse-Moorhead, B., & Griffith, J. C. (2018, April 6). A necessary step toward professionalization and evidence-informed practice: The CHESS project. Presented at the Online Working Conference: Charting the Future of Evaluation Education, hosted by The University of Melbourne.

Slide(s)

Overleaf

How can we ensure high-quality evaluation practice?

Foundations

- Quality and Credibility
- Professionalization
- Meta-Evaluation

Our Research

***CH*ecklist for *E*valuation-*S*pecific *S*tandards (CHESS)**
http://chess.uconn.edu/

- People and personnel
- Evaluation context and characteristics
- Investigation design and methods
- Evaluative argument and conclusions

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Presentation Description

Background on My Research on Evaluation

I am interested in the profession of evaluation, both in terms of the preparation of evaluators and the nature of expertise in the field. Three interrelated questions guide my research on this front:

1. What should beginning evaluators know and be able to do?
2. How can expertise in core beginning evaluation practices be developed?
3. How can we ensure high-quality evaluation practice?

In this presentation, I will talk to you about the research I am doing with my colleague, James Griffith at Claremont Graduate University, on the Checklist for Evaluation-Specific Standards (CHESS).

Foundations

The foundations of CHESS include quality and credibility, professionalization, and meta-evaluation (see left-hand side of slide).

Quality and credibility are among the most fundamental issues in evaluation––Smith and Brandon (2007) describe fundamental issues as those that are continuously revisited. Unprecedented, growing, global demand for evaluation has placed the field's longstanding concerns with quality, validity, and credibility once again in the spotlight. Why is that? Schwandt (2015) notes, "widespread concern in the field that many who take on the job of conducting or managing an evaluation lack formal training or experience, resulting in evaluations that are poorly conceived, poorly executed, and poorly managed" (p. 128). In other words, the growing demand for evaluation has prompted increased concern about who is meeting the demand and how.

Professionalization is seen as one way to answer calls for accountability, *or quality control*, and to enhance credibility. In the 1980's Cronbach noted that, "society will obtain the assistance that evaluation can give only when there is a strong evaluation profession, clear about its social role and the nature of its work" (p. 9).

Growing demand and concerns about quality have made it a priority to work past the controversy about professionalizing evaluation. One way to address these issues is through the institution of reporting standards.

Metaevaluation supporters argue that the credibility of evaluation depends on consistent production of high-quality evaluations, or at least confirmation of their production. Expanding on this, Stufflebeam (2001) writes, "as professionals, evaluators need metaevaluations to assure the quality of their evaluations . . . and earn and maintain credibility for their services among both clients and other evaluators" (p. 184).

To assure consistent quality, the evaluation or evaluators must be evaluated. Scriven writes that the only way to ensure the cycle of bias is broken is to "make sure the evaluators get evaluated" (1975, p. 12). At the same time, the evaluation profession cannot rely on full, formal metaevaluations to provide this assurance because it is not ubiquitous. This is where reporting standards come in.

Reporting standards that require *transparent* and *complete* reporting enable audiences to conduct their own minimal metaevaluation. Even simplest, least resource intensive metaevaluations are likely to turn up useful results. This simplest model is essentially a desk review of the relevant documents (Stufflebeam, 2001) or an essay review of the evaluation report (Cook, & Gruder, 1978).

Without consistent, complete, and transparent reporting of primary evaluations, the quality of evaluations may not be clear to anyone other than the primary evaluators and metaevaluators with broad access to the original data, stakeholders, or both. In this sense, a lack of consistent, complete, and transparent reporting threatens the credibility of evaluation, because differences between good and bad evaluations may not be clear. And, reporting standards also make it easier to conduct more intensive metaevaluations when those are feasible.

In sum, James and I see the instituting of reporting standards is a necessary step toward meeting the growing demand in evaluation for professionalization and evidence-informed practice. CHESS was designed for all types of evaluations, and specifically written reports resulting from these endeavors. It describes the minimum, evaluation-specific elements that must be reported to make judgments about the quality of the evaluation.

Toward the Development of Reporting Standards

The research to develop the CHESS included several parts:

- Reviewing published evaluation studies or research that sought to summarize them, reviewing research reporting standards and guidelines (e.g., CONSORT), and reviewing evaluation-specific standards and checklists (e.g., TREND Statement).
- A public comment period (ongoing).
- An expert review (ongoing).

In the future, we plan to engage in use-in-practice studies. We also hope other evaluation scholars will engage in research on and with CHESS.

The CHecklist for Evaluation-Specific Standards (CHESS)

The current version of CHESS includes four domains, which are domains that are germane to *all* evaluations (see right-hand side of slide).

Domain one, *people and personnel*, is about who is involved. Domain two, *evaluation context and characteristics*, is about the context in which the evaluation is happening. Domain three, *investigation design and methods*, is about what evidence is gathered and how. Domain four, *evaluative argument and conclusions*, is about what is done with the evidence to construct the evaluative argument and final conclusions.

Three other things are important to mention about CHESS:

- CHESS includes 35 items spread across the four domains.
- Examples of items falling underneath each domain are included in CHESS. For example, the *evaluative argument and conclusions* domain includes items about synthesis procedures, comparison procedures, and interpretation processes.
- We chose to use a checklist format for several reasons. First, checklists have been a part of evaluation's knowledge base since the 1970s, and WMU serves as a checklist repository for Evaluation. So, there is a history of checklists in evaluation. Second, empirical work on the CONSORT and TREND statements have shown that use is related to improved research reporting quality. Third, the formal study of checklists across professions done by Gawande (2010) and described in *The Checklist Manifesto*. One of Gawande's key arguments is that when the work is complex, meaning when there is neither a straightforward recipe nor the means to create one, and where expertise is necessary but insufficient alone, checklists provide the best option for ensuring quality. As evaluation scholars have rightly noted, evaluation practice is complex and it requires specialized knowledge, which is aligned with Gawande's key argument. For all of these reasons, we adopted a checklist format.

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Insights into current issues of M&E training in South Africa

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Citation

Wildschut, L. (2018, April 10). Insights into current issues of M&E training in South Africa. Presented at the Online Working Conference: Charting the Future of Evaluation Education, hosted by The University of Melbourne.

Slide(s)

Overleaf

The context

planning, monitoring and evaluation
Department: Planning, Monitoring and Evaluation
REPUBLIC OF SOUTH AFRICA

UNIVERSITEIT iYUNIVESITHI STELLENBOSCH UNIVERSITY

SAMEA
South African Monitoring and Evaluation Association

AfrEA

The study: understanding the SA M&E evaluation landscape

1. formal evaluation training programmes in South Africa;
2. education evaluation modules or training programmes in 3 other countries (international);
3. a review of South African evaluation publications;
4. the needs of black evaluators and black-led evaluation agencies; and
5. the needs of commissioning agents (as well as their approaches to evaluation and its use).

	SUPPLY SIDE		DEMAND SIDE	
Local	1. An analysis of all existing accredited and non-accredited monitoring and evaluation programmes and HR capacity at SA higher education institutions	3. A review of evaluation publications in South Africa	4.1 Analysis of the capacity and needs of black evaluators (five key evaluation agencies and five black-led evaluation agencies)	4.2 A review internship/mentorship strategies and plans for the development of black evaluators in approximately five key evaluation agencies
International	2. Desktop analysis of international examples of education evaluation courses/modules/ programmes		5. Analysis of who donors are; approaches, needs and capacity in undertaking education evaluations	

Description

Evaluation Education Conference (April 2018)

INSIGHTS INTO CURRENT ISSUES OF M&E TRAINING IN SOUTH AFRICA

1. **Presenter**: I have been involved in evaluations since 2000 and in evaluation education since 2006
2. **Courses on offer at CREST**: Post graduate Diploma in M&E, MPhil in Monitoring and Evaluation and a PhD in Evaluation Studies at Centre for Research in Evaluation Studies (CREST) Stellenbosch University.

Before focusing on the study, I would like to share some insights into the SA M&E system.

3. The context

One could argue that M&E in SA is approaching the stage of what Jacob et al in their international atlas of evaluation would call a "mature evaluation culture"*.

1. We have a reasonably well-articulated system of M&E structures and policies at national (Department of Planning, Monitoring and Evaluation) and provincial level
2. We have 12 universities offering either M&E modules, short course or formal degrees and diplomas.
3. We have a range of international and national agencies commissioning evaluation studies across a range of sectors
4. The demand for M&E – both for conducting studies and education and capacity-building – continues to escalate. (2018 Total 422 applications with 59 accepted)
5. In recent years, we have begun to enter a stage of more coherent institutionalization, professionalization – SAMEA is currently working in a task team on AFREA standards, and our members are considering a set of competencies for SA evaluators.

Having said this, our knowledge of the specifics of this 'maturing culture' is not complete and – more specifically – well integrated or coherent. For example, we have no understanding of the quality or content of the courses offered by the 12 universities in evaluation education – what we do know is that these South African universities are mainly offering modules and short course in evaluation – it is only the University of the Witwatersrand, the University of Cape Town (UCT) and Stellenbosch University (SU) which offer Masters' level courses and only UCT and SU which offer a PhD in evaluation.

4. The research study

The overall purpose of the study is to fill crucial gaps in our knowledge of the fast-changing landscape of M&E in SA.

What is interesting about the study:

- The study is a collaboration between academia and a consulting company
- Two emerging evaluators are working on the project
- The study will provide the evaluation community in SA key information about the supply end of the evaluation chain as well as the demand side – not only from commissioners of evaluations but also previously disadvantaged evaluators and evaluation agencies.

5. How is this relevant for this grouping?

We can share our findings with this group if it continues in its current form. If you have done a study on any of the components and have something to share with us then contact me directly.

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Assessing Learning Outcomes in Online Learning for Monitoring and Evaluation Compared to Traditional Face to Face Workshops

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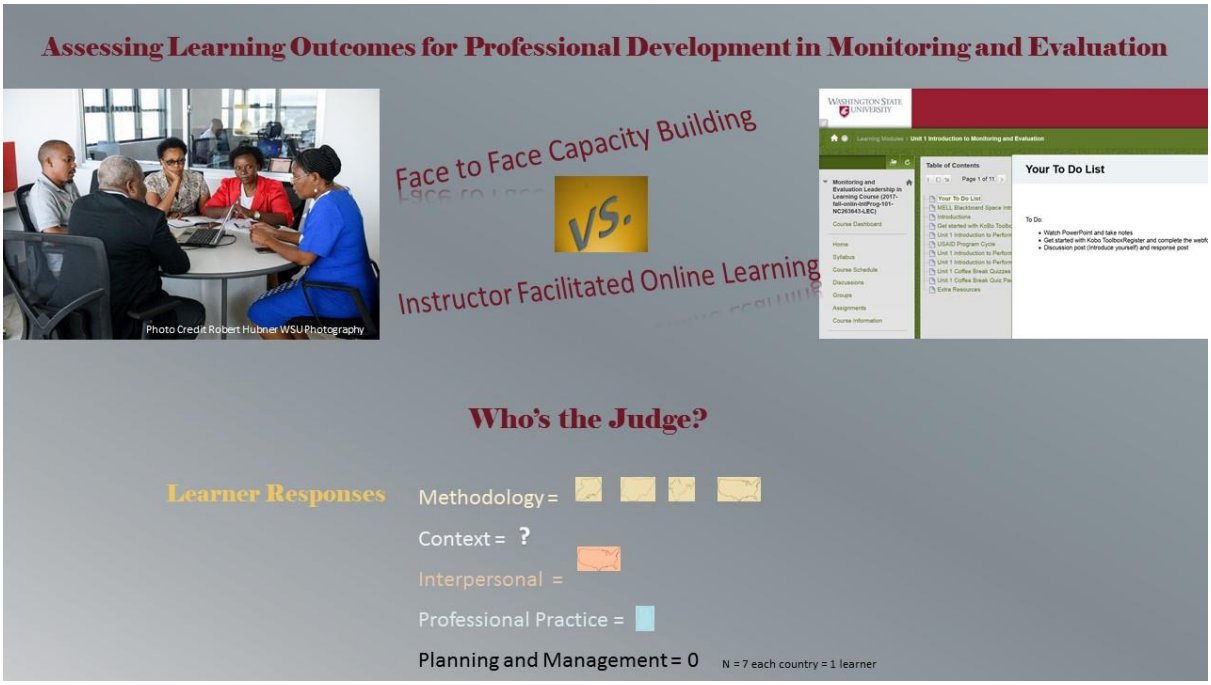
Citation

Castelin, Kim. (2018, April, 10). Comparative Assessment of Professional Development Delivery Modes for Monitoring and Evaluation in International Development: Application of Competency-Based Self-Assessments. Presented at the Online Working Conference: Charting the Future of Evaluation Education, hosted by The University of Melbourne.

Slide(s)



Description

There is a wide variance in formal training for Monitoring and Evaluation leaders in international development programs. There is currently a drastic shift in the use of monitoring of evaluation data from a focus only on program accountability to use of data for adaptive program management (United States Agency for International Development, 2018). This shift has created a knowledge gap for program managers and implementers in the actual practice of adaptive program management. Market research completed during development of an online professional development course identified delivery modes for professional development opportunities in Monitoring and Evaluation are online courses, face-to-face workshops and trainings, and self-guided learning using publicly available resources.

As the field of evaluation works to professionalize, teaching of evaluation in international development programs will need to follow suit. Individuals who are responsible for leading Monitoring and Evaluation systems to support adaptive program management certainly need to have exposure to the knowledge, skills, and abilities that support competencies for evaluators (King & Podems, 2014). USAID policy changes occurred in 2016, creating an immediate need for both new and experienced practitioners to pivot their skills to support donor demands (United States Agency for International Development, 2018). Professional development offerings need to tailor to the needs of non-traditional students who may not require a degree but could use a formal grounding for applying their experience for evaluation (Regier, 2014). Research on pedagogy and andragogy for non-traditional learners notes that the needs of non-traditional learners are different from other students (Schreyer Institute for Teaching Excellence Penn State, 2007). The online mode for course delivery offers a unique learning community, which can meet these needs, particularly the need for self-paced learning, application of prior knowledge and experience to new curriculum, and the opportunity to learn, apply, and reflect (Schreyer Institute for Teaching Excellence Penn State, 2007).

Despite the evidence that online learning is well positioned to deliver better learning outcomes for working professionals (i.e. non traditional learners) (Regier, 2014) than other short-duration face to face capacity building efforts these other efforts are still frequently practiced. Given the range of knowledge and skills that support evaluation competency, there is a possibility that different modes of delivery are better suited to fit different aspects of evaluative competencies (King J. A., 2007). Washington State University delivers professional development in monitoring and evaluation through two modes: the online course and face to face workshops and training. We are striving to develop more rigorous assessment criteria so that we can better determine 1) effectiveness of our efforts on learner outcomes 2) differences between modes in learner outcomes for knowledge, skills, and abilities, and 3) differences between modes in learner outcomes at the competency level. This will help us to deliver higher-quality educational content to professional learners and will help us to set realistic expectations for the limits of different modalities in achieving learning outcomes.

Assessments in the online course currently consist of graded assignments and completion of discussion posts in the online course. Neither of these assessment tools have high validity in assessing actual knowledge or skills. In order to create a data set which allows for cross-mode comparison we are working to develop assessment tools that allow for assessment of specific knowledge, skills, and abilities, and can also be used to develop scores to measure progress in competencies . Currently, we are testing self-assessment of competencies that allows professionals to self-identify learning needs and focus on skill development; a similar tool was successfully used in faculty online teacher training (Rhode, Richter, & Miller, 2017). Adult learners tend to be self-directing and often thrive when their prior expertise is recognized (Schreyer Institute for Teaching Excellence Penn State, 2007). Fitting an assessment tool to online learner preferences serves a dual purpose—it enables self-assessment and introduces learning outcomes in terms of professional evaluation competencies which most learners are unfamiliar with. This self-assessment also helps us learn what components of our content need to be improved to serve our learners and the job markets in which they are competing.

Face to face capacity building efforts are short in duration, focused on a limited number of knowledge, skills, or abilities, and are typically combined with completing deliverables for immediate use in projects. Assessments at the knowledge, skills, and abilities level have the power to enhance the quality of both face to face and online options. Assessment data can identify which teaching mode is most effective at increasing knowledge, skills, and abilities. Learner outcome information is

critical to improving and enhancing the quality of capacity building efforts for Monitoring and Evaluation and is aligned with the larger effort of professionalizing evaluation practice.

The challenge as it stands right now has several parts. The first is a more rigorous examination of the knowledge, skills, and abilities for professional evaluators that pertains to monitoring and evaluation specifically. Next is identifying assessment tools which are reliable, engaging for non-traditional learners, and can be delivered either using online forms or in a face to face setting. The first attempt at self-assessment is currently focused on the competency level, is a short web-based form, and does not make any distinction about a learner's level of competency. An ideal assessment tool would also be able to measure a learner's level, both upon entering the professional development course and upon completion. Observational evidence from experience also suggests that non-codified knowledge, skills, and abilities are missing in certain contexts. Quality of learner experience is negatively impacted when learners lack prerequisites; yet these are the very professionals who stand to benefit the most from professional development opportunities that can be tailored to fit their needs. An ideal assessment tool for use in international development would also contain some metrics for pre-screening prerequisites.

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Appendix A: EVALTalk postings

EOI, proposals, and session registration information posted to EVAL Talk

(https://listserv.ua.edu/cgi-bin/wa)

Subject	From	Date	Time
Call for Proposals: A Working Conference to Chart the Future of Evaluation Education and Training	John LaVelle <john.matthew.lavelle@gmail.com>	2017-12-01	15:16
Proposals due Jan 31: A Working Conference to Chart the Future of Evaluation Education and Training	John LaVelle <john.matthew.lavelle@gmail.com>	2018-01-15	14:04
An ONLINE Working Conference on Evaluation Education	Amy Gullickson <amyg4ce@hotmail.com>	2018-02-13	19:15
ONLINE Working Conference for Evaluation Education - Session Registration Open Now	Amy Gullickson <amyg4ce@hotmail.com>	2018-03-14	10:07

MN Call for Proposals and Extension of Deadline

Subject: Call for Proposals: A Working Conference to Chart the Future of Evaluation Education and Training — Reply
From: John LaVelle <john.matthew.lavelle@GMAIL.COM>
Reply-To: American Evaluation Association Discussion List <EVALTALK@LISTSERV.UA.EDU>
Date: Fri, 1 Dec 2017 14:16:43 -0600
Content-Type: text/plain
Parts/Attachments: text/plain (141 lines)

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CALL FOR PROPOSALS


A Working Conference to

Chart the Future of Evaluation Education and Training

March 19-20, 2018


Sponsored by

The Minnesota Evaluation Studies Institute (MESI), University of Minnesota

The University of Melbourne (Australia) Centre for Program Evaluation

Claremont Graduate University
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The Teaching of Evaluation Topical Interest Group of the American Evaluation Association

The purpose of this working conference is to engage evaluation trainers, instructors, and faculty to begin a formal discussion of the current status of the education and training of program evaluators. The conference will address a range of essential questions, including:

- What are foundational questions in the area of evaluation education, and how can researchers and practitioners collaborate to describe and explore them together?
- What are the risks of not addressing evaluation education with data-driven questions and solutions?
- What research exists on evaluator education/training, and what is needed?
- How can research on evaluation education be strengthened?

We seek proposals from people who are actively engaged in evaluation education practice so we can establish a collaborative, professional community of individuals charged with teaching the current and future generations of evaluators.

A number of presentation opportunities are available for participants to share their theoretical and empirical work on evaluation education. We are requesting proposals for presentations of 3-5 minutes on a variety of topics related to the education and training of evaluators, including, but not limited to, the following:

- Conceptual framings of evaluator and evaluation education/training
- Research on evaluator and evaluation education/training
- The status and future of evaluation educators in different settings (e.g., university, paid professional development, conferences, in-house trainings, on-line)
- The role of competencies in curriculum development
- Pedagogy for the practice of evaluation
- Assessing learning and impact from evaluator education/training programs
- The appropriateness and potential of program accreditation and/or evaluator credentialing
- Good questions to shape our vision and future work

All proposals will undergo peer-review for content and fit with conference goals. For your work to be considered, please complete the application at **https://goo.gl/forms/DjzyHmozZtj9lITQ2** and submit your form by January 15, 2018.

Anticipated benefits of this conference and the pre-work leading to it include the following:

Benefits for participants

· Adding a conference presentation to your resume or CV
· Establishing connections with others working in evaluation education
· Participating in a conversation that will shape the research agenda and

future of evaluator education Potential benefits for participants over time

· Collaborative research and eventual; publications on key topics identified
· Participation in AEA conference panel presentations in coming years
· Access to an ongoing community working on cutting edge research to improve teaching practice

The working conference will occur concurrently with the annual Spring Training of the Minnesota Evaluation Studies Institute. It will begin at 5:00 PM on Monday, March 19, 2018 with an introductory working session and dinner, then continue throughout the day on Tuesday, March 20, 2018, with presentations in the morning and early afternoon and ending with agenda setting and final debriefing. There will be no cost to attend the working conference, although participants can attend the MESI conference for an additional fee. See www.evaluation.umn.edu for details and more information.

We look forward to launching what we believe is a discussion critically important to the future of our field. We hope you can join us.

Jean A. King, University of Minnesota

John LaVelle, University of Minnesota

Amy Gullickson, University of Melbourne (Australia)

Stewart Donaldson, Claremont Graduate University

Gary Skolits, University of Tennessee (AEA Teaching of Evaluation TIG Chair)

Subject: Proposals due Jan 31: A Working Conference to Chart the Future of Evaluation Education and Training
Reply
From: John LaVelle <john.matthew.lavelle@GMAIL.COM>
Reply-To: American Evaluation Association Discussion List <EVALTALK@LISTSERV.UA.EDU>
Date: Mon, 15 Jan 2018 13:04:06 -0600
Content-Type: text/plain
Parts/Attachments: text/plain (170 lines)

Dear friends and colleagues,

I am happy to share that due to popular demand, we are extending the

deadline for submitting proposals to the Working Conference to Chart the Future of Evaluation Education and Training.

The new application deadline is January 31, 2018. Submit your proposal at: https://goo.gl/forms/DjzyHmozZtj9lITQ2

Please email me at JLaVelle@umn.edu if you have any questions or challenges submitting your proposal.

I look forward to seeing you there!

John

CALL FOR PROPOSALS (copied from first announcement)

Online Working conference EOI and Registration

Subject: An ONLINE Working Conference on Evaluation Education
From: Amy Gullickson <amyg4ce@HOTMAIL.COM>
Reply-To: American Evaluation Association Discussion List <EVALTALK@LISTSERV.UA.EDU>
Date: Tue, 13 Feb 2018 18:15:12 -0600
Content-Type: text/plain
Parts/Attachments: text/plain (43 lines)

Reply

Chart the Future of Evaluation Education and Training:An ONLINE Working Conference

Key information
- 60-minute sessions happening April 5-13, 2018
- Dates and times to be determined by those interested in participating
- Sessions conducted using Zoom Online Conferencing
- Express your interest here by 28 February: https://melbourneuni.au1.qualtrics.com/jfe/form/SV_8iUeq3tgrdkDxgp

In March 2018, University of Minnesota (MN) is hosting a face-to-face working conference on evaluation education. Since not everyone interested can attend, we are offering an opportunity to connect with this emerging research community via online web sessions. If you teach evaluation in university, professional development, or organizational settings, we encourage you to take part.

Online sessions will build on the outcomes of the MN working conference and continue to explore the essential questions, including:
- What are foundational questions in evaluation education, and how can researchers and practitioners collaborate to describe and explore them together?
- What are the risks of not addressing evaluation education with data-

driven questions and solutions?
• What research exists on evaluator education/training, and what is needed?
• How can research on evaluation education be strengthened?

The 60-minute sessions will include a summary of the MN conference, brief participant presentations, and discussion. You are welcome to attend without presenting.

To establish the time and dates for the sessions, please take a few minutes now to express your interest and enter times you are available here: https://melbourneuni.au1.qualtrics.com/jfe/form/SV_8iUeq3tgrdkDxgp
This link will be available through 28 February.

Once the times are established, we will send out another announcement with information on registration and presentation proposal submission. Proposals will undergo a peer-review process.

By participating, you will contribute to an ongoing conversation that will shape the future of evaluation education. You can also add a conference presentation to your resume or CV.

We hope you can join us for this critically important discussion.

Amy Gullickson, University of Melbourne (Australia)
Jean A. King, University of Minnesota
John LaVelle, University of Minnesota
Stewart Donaldson, Claremont Graduate University
Gary Skolits, University of Tennessee (AEA Teaching of Evaluation TIG Chair)

Subject: ONLINE Working Conference for Evaluation Education - Session Registration Open Now
Reply
From: Amy Gullickson <amyg4ce@HOTMAIL.COM>
Reply-To: American Evaluation Association Discussion List <EVALTALK@LISTSERV.UA.EDU>
Date: Wed, 14 Mar 2018 10:07:33 -0500
Content-Type: text/plain
Parts/Attachments: text/plain (33 lines)

Hello!
Thanks to those of you who completed the Expression of Interest (EOI)/whenisgood for the online sessions for the Online Working Conference on Evaluation Education. We have scheduled four sessions:
1. Friday 6 April 0900 (9am) AEST

2. Monday 9 April 2100 (9pm) AEST
3. Tuesday 10 April 0000 (midnight) AEST
4. Wednesday 11 April 1300 (1pm) AEST

To convert to your time zone:
https://www.timeanddate.com/worldclock/converter.html?iso=20180312T220000&p1=152

Follow this link to register to attend and/or propose a presentation:
https://melbourneuni.au1.qualtrics.com/jfe/form/SV_eni6yk9yn7J3Gux

If you cannot attend these sessions, but are interested in participating in the ongoing collaboration and completed the Expression of Interest (EOI) survey, we have your contact details and we will keep you in the loop. If you did not complete the EOI survey, then click here to provide your details so we can keep you updated: https://melbourneuni.au1.qualtrics.com/jfe/form/SV_0HfWf2Q3h6wAlPn
(FYI, we had many people do the whenisgood, but not the survey - if you're not sure, give us your details again - whenisgood doesn't capture your email information.)

For Presenters
Details for presentation proposals are available on the registration website. Find directions for preparing your presentations here:
https://www.dropbox.com/s/x8ghp51pybvtbxi/EvalEdWC_Online%20PresentationTemplate%20and%20Directions.pdf?dl=0

You will indicate your preferred presentation session times on the registration page. PLEASE RESERVE THIS TIME (or times) in your calendar when you complete the registration process. We will set the presentation schedule based on your stated preferences and will not be able to revise. We'll get back to you as quickly as we can with information about proposal acceptance.

Hope to see you online in April!
Best regards,
Amy Gullickson on behalf of the Working Conference Team

Appendix B: Detailed Schedule for Working Conference, Charting the Future of Evaluation Education and Training

Posted/sent in advance
Attachments:

- *AJE* paper with questions to frame reading

Details:

- High level schedule for the conference
- *Reminder that they need to bring 10 printed copies of their slide because we can't use the projector in small groups*
- Link to example of 3-minute presentations: https://vimeo.com/254806836
- Conference proceedings will be published as an e-book (for online and face to face). Submit slide plus a summary (1000 word double spaced). Conference team has quality control responsibilities (i.e., will peer review entries). We will provide details about how to submit at the end of the conference.

Day	Time	Activity	Materials/People
Monday evening	5:00	Welcome and introductions – combined with AJE paper response • Voicing variables • 3 step interview around how you got connected to evaluation	Jean and Laurie
	5:15	Discussion of pre-developed (by us) public agreements/common ground rules- • Cooperative, not competitive goal structure • "Share the life together" page	Amy and Laurie
	5:45	Going over the *AJE* paper- interactive discussion of the status of evaluation education	Laurie
	6:15	Goals for the day tomorrow, agenda	Laurie
	7:30	Adjourn	Laurie
Tuesday morning	8:30	Coffee	
	9:00	Round robin kick off • People's take-aways from previous night's presentations • Review/affirm public agreements • Morning presentations are primarily university-based; afternoon will relate to professional associations • Introduce note-takers	Laurie
	9:15	Presentation- Evaluation education (1976-present)	John
	9:30	Group presentations • Break into 3 groups (once in a group, don't move) • Round 1 topics o Competencies	Laurie

Day	Time	Activity	Materials/People
		o Affect o Diversity	
	10:15	BREAK	
	10:30	• Break into 3 groups again (once in a group, don't move) • Round 2 topics o Discipline o Delivery o Program/curriculum	Laurie
	11:00	• Break into 3 groups again (once in a group, don't move) • Round 3 topics o Assessment o Retention o Practice	Laurie
	11:30	• What research questions rise to the fore based on what you've heard this morning? • Process- half sheets, concept formation	Laurie- CAN YOU FIGURE OUT SOME PROCESS?
	12:00	LUNCH	
Tuesday afternoon	12:45	Check-in	Laurie
	1:00	Large group presentation of training/professional development papers (3 in all). • GEDI • AEA prof development • CES E-institute	Laurie
	1:30	Facilitated discussion. Linking back to the AJE article – alignments. Processing of content thus far Research opportunities. What else would be useful to know in terms of advancing evaluation education? Comparison to university training and the questions generated there – are the same questions applicable? How can practices from both sides inform each other? What lit reviews are needed?	Laurie
	1:45	Work session – choose your groups • Make groups according to interest; people organize themselves	Laurie
	2:45	Break	
	3:00	Report back	Laurie

Day	Time	Activity	Materials/People
		• Does anyone have anything to add? (Laurie- need a process for this?)- critical friend	
	3:30	• Discuss next steps (do we meet again?) • Preparation for on-line meeting in April • Identifying your critical friend for the journey	
	4:25	Wrap-up, thanks, and adjournment to Axel's @ Radisson	Jean and Laurie

Appendix C:

Working Conference: Charting the Future of Evaluation Education and Training

Contents

The Location

For details on the conference center, parking and hotel accommodation, go to:
http://www.cehd.umn.edu/OLPD/MESI/spring/default.html

The Schedule

Day	Time	Activity
Monday evening	5:00	Welcome and introductions
	5:15	Public agreements
	5:45	*AJE* paper
	6:15	Goals for the day tomorrow, agenda
	7:30	Adjourn
Tuesday morning	8:30	Coffee
	9:00	Round robin kick-off
	9:15	Presentation- Evaluation education (1976-present)
	9:30	Group presentations
	10:15	BREAK
	10:30	Group presentations
	11:00	Group presentations
	11:30	Discussion
	12:00	LUNCH
Tuesday afternoon	12:45	Check-in
	1:00	Group presentations
	1:30	Facilitated discussion, linking back to the *AJE* article – alignments
	1:45	Working groups according to interest
	2:45	Break
	3:00	Report back
	3:30	Discuss next steps (do we meet again?)
	4:25	Wrap-up, thanks, and adjournment – head to Axel's Restaurant at the Roseville Radisson.

Presentation Preparation and Delivery

We will be breaking into small groups in the same room to do the presentations, so you will not have access to a projector and screen. Groups will be about 10 people. You can share using your laptop/tablet screen, or bring along printed copies. FYI, getting print outs at the conference center is REALLY expensive, so don't wait until the last minute if you can avoid it.

Also, we will publish conference proceedings from this workshop and the online sessions. Proceedings will include slides plus up to a 1000-word description from each presenter. We will provide an online space for you to submit; details will be given at the end of the conference.

Preparation

- The preference is for one slide or letter size sheet, no animation. Along with this email you'll find a ppt slide formatted to letter size paper, which you may choose to use.
- 14-16 point font is the smallest you should use for these presentations if you are printing. 18 point font or larger if you are going to use your laptop or tablet.
- Put your name, affiliation, and email address on your slide so people can contact you.
- TIP: People can't read and listen at the same time. Protect your Intellectual Property (IP) and your listeners – don't put huge amounts of text on your slide. Use images, figures or other ways to describe your research or ideas.

Delivery

- You will have 3 minutes. The three minutes starts when you start talking. The person presenting after you will keep time, give you a 30 second warning, and stop you at 3 minutes.

Example

- To watch an example three minute presentation: https://vimeo.com/254806836

The Paper

The working conference was inspired by our collaboration to author the paper included on the following pages: Gullickson, A.M., King, J.A., LaVelle, J.M.; Clinton, J (under review). The Current State of Evaluation Education: A Situation Analysis. *American Journal of Evaluation*

We have been granted permission to share this paper while it is under review. If you wish to cite anything from it, please contact Amy at amy.gullickson@unimelb.edu.au

Please read the paper with these questions in mind – we will discuss as part of our opening activities on Monday evening.

1. Figure 1 (p. 5) presents an initial logic model for evaluation education. What are its strengths and weaknesses? How might you revise it?

2. The manuscript uses Stufflebeam's CIPP model to structure a conversation about the current state of evaluation education. For each component (i.e., context, input, process, and product), identify what you believe are the two or three most important points and the reasons why.

3. Again thinking about each component separately, what content or issues do you think are either missing or wrongly emphasized?

4. The "Now What?" section of the manuscript makes several suggestions for next steps in developing the field of evaluation education. Do you agree with the suggested steps? What other actions would you suggest? Which are needed most immediately?

5. What one statement in this manuscript strikes you most dramatically? Why?

The Current State of Evaluation Education: A Situation Analysis

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Acknowledgments

The authors would like to acknowledge Nan Wehipeihana for her contribution to this conversation, her ideas, and insights.

Abstract

Education is critically important for the maintenance and growth of program evaluation and its emergence as a profession. This paper presents evaluation education as an intervention and provides a foundation for its evaluation. In it, Stufflebeam's Context, Input, Process, and Product (CIPP) model and Eoyang and Holladay's "What's so? So what? Now what?" are used to frame a broad review of literature and practice and yield an analysis of the current state of evaluation education in formal settings, its implications, and directions for future research and action. Findings suggest there is much work to be done to understand the needs for evaluation education, delineate the standards for quality in evaluation education and evaluation practice, identify the inputs and processes most effective for addressing those needs, and document its impacts. The paper provides a call to action for improving the quality, consistency, and integrity of this crucial work.

Keywords: Evaluation education, evaluator training, evaluator competencies, professionalization

The Current State of Evaluation Education: A Situation Analysis

Smith (2010) called evaluation "a practical art performed to address client and societal needs and conducted, at least in part, by members of a professional guild of practitioners… such as medicine, law, engineering and business" (p. 384). These other practical arts have prescriptive requirements for the training of those who would engage in professional practice. In these areas, formal educational experiences and ongoing development serve to reinforce core knowledge of the field and reinforce one's identity as a professional (Etzioni, 1969; Friedson, 1999). Consistency in professional education is critical so that all practitioners draw from a common pool of knowledge and embody accepted norms of conduct (e.g., principles, ethics), which are then communicated to groups outside the profession. Communication is essential because failure to craft coherent messages can lead to miscommunication and confusion about fields and why they exist (Forsyth & Danisiewicz, 1985).

While the field has paid attention to the education of evaluators for many years through a small, but steady number of research studies since the late 1970s (Ayoo & King, 2017), one of the challenges to evaluation's emergence as a coherent profession is the lack of consistency and quality control in the education of evaluators. As Stufflebeam and Shinkfield (2007) noted, "[A]chieving and sustaining the status of the profession requires subjecting one's work to evaluation and using the findings to serve clients well and over time to strengthen services" (p. 64). The aim of this paper is to provide a substantive picture of what we know and do not know about the current state of evaluation education, with the aim of sparking conversation and debate that shifts from what we *are* doing (Christie, Quiñones, & Fierro, 2014; Shackman, 2015; Stevahn, King, Ghere, & Minnema, 2005) to what we *should be* doing to educate evaluators.

In this paper, the authors address the challenge noted by Stufflebeam and Shinkfield (2007), treating the education of evaluators like any other evaluand and engaging in the initial steps to prepare for its evaluation. We have categorized evaluation education as a program, as defined by the Joint Committee on Standards for Educational Evaluation (Yarbrough, Caruthers, Shulha, & Hopson, 2010): systematic activities to achieve goals related to needs of participants in particular contexts resulting in documentable results. We have also set the boundaries via definition of terms. While authors have used the terms "evalua*tor* education" and "evalua*tion* education" interchangeably in the literature, there are important distinctions between the two. "Evaluator education" is singular and refers to the preparation of individuals for evaluation practice or scholarship. "Evaluation education," by contrast, is a broader term covering all aspects of planning and conducting evaluation, whose audience includes consumers and various stakeholders of evaluation, evaluation practitioners, and scholars. In this paper, we will be primarily discussing evaluation education.

We chose the Context, Input, Process, Product (CIPP) model (Stufflebeam, 2003; Stufflebeam & Zhang, 2017) and created a basic logic model (Figure 1) to frame and structure the analysis. As per the CIPP model, the *context* component includes needs as the driver and rationale for the evaluation education intervention. Our analysis of *inputs* was structured by the education literature related to teaching combined with the components of the CIPP model. With regard to *process*, people acquire education in evaluation through various mechanisms. However, the research on most of these processes is limited, so we have chosen to set the boundary on this paper to formal education only (e.g., certificates and master's and doctoral degrees) where more published information is available. The *product* category includes all outcomes. The lighter text boxes in the logic model present key components that were not feasible to address in this paper, but provide options for future study.

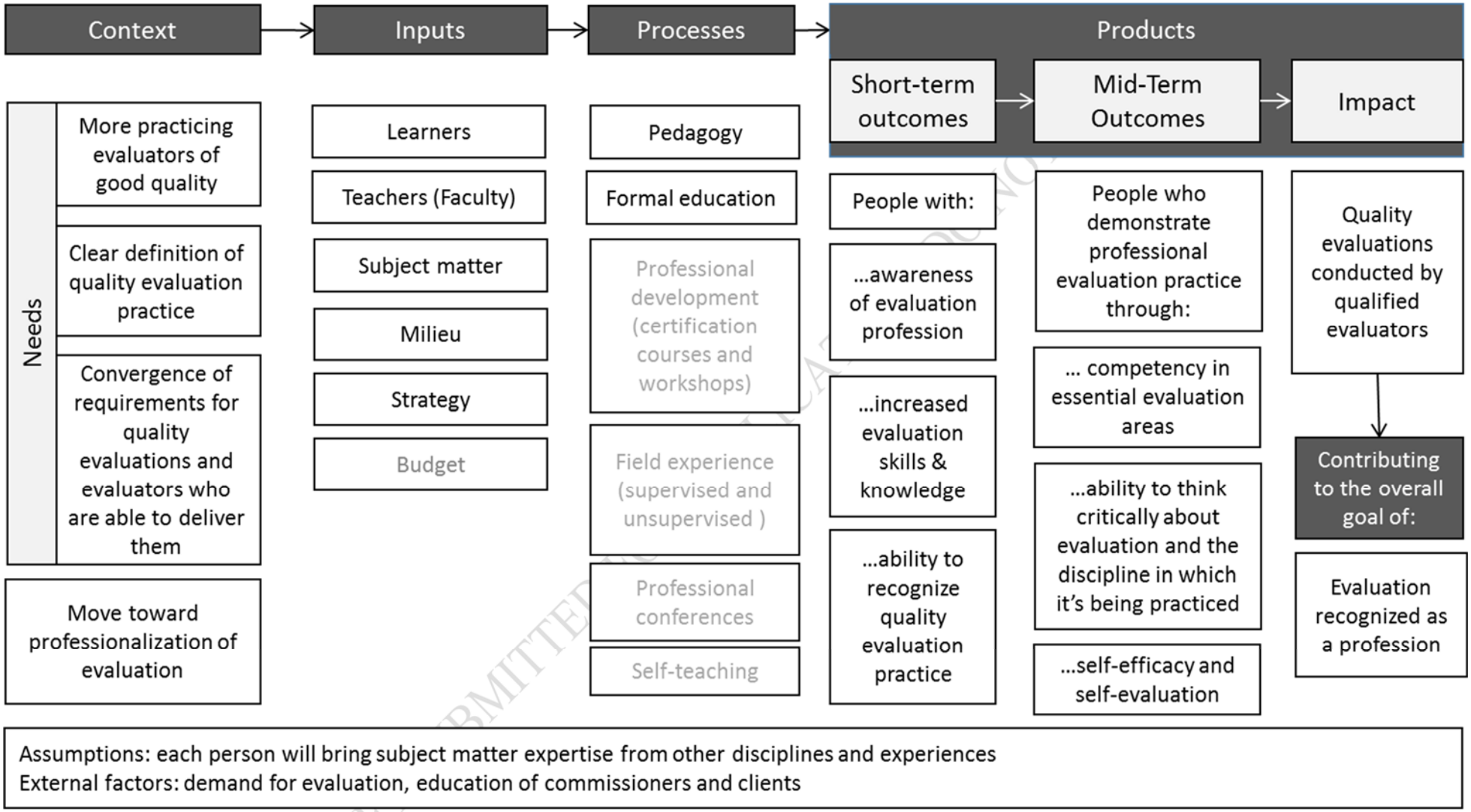

Figure 1. Evaluation Education Logic Model

In the following sections, we will provide an analysis of the CIPP components using questions from the adaptive action model, "What's so? So what? Now what?" (Eoyang & Holladay, 2013, p. 30). The CIPP sections include a literature-based discussion covering the current state and the implications for the components (the "What" and "So what"). The concluding section provides questions to shape possible next steps, including areas of research needed, potential changes in practice, and so on (the "Now what").

The authors grounded their work in the literature and their experience as content experts in the education of evaluators. They conducted independent literature searches and included sources such as journal articles, books, and grey literature. These scholarly sources were augmented by conversations among education colleagues and our experiences in both situation and gap analysis.

Context

"Context evaluations assess needs, problems, assets and opportunities, as well as relevant contextual conditions and dynamics" (Stufflebeam & Zhang, 2017, p. 23). With regard to needs for evaluation education, indicators such as job ads, requests for proposals (RFP), requests for services (RFS), requests for qualifications (RFQ), etc. suggest that evaluation skills are in demand. Indeed, more and more funders require it, including governments and government agencies (Australian Commonwealth Government, 2013; National Science Foundation, 2017), and those who commission evaluations want to know that they are hiring qualified, ethical professionals capable of completing impactful evaluation studies. This desire has taken several forms, such as the Canadian Evaluation Society's Credentialed Evaluator (CE) program and large organizations developing proprietary evaluation education infrastructure (e.g., World Bank, United Nations). As well, informal analysis of applications to various evaluation-specific university programs supports the essential premise that the demand for evaluation education, formal and informal, is also

on the rise. The conclusion is incontrovertible: there is significant need for individual evaluators and evaluation teams that can provide high-quality evaluative thinking and skills. Therefore, there is an equivalent need for well-educated evaluators and the systems that prepare them.

Evaluation's diverse practice shapes the context of evaluation education in terms of conditions and dynamics. Evaluation happens in all sectors of modern society, either formally or informally. Thus, we have a variety of definitions of what evaluation is, e.g., applied research (Rossi, Lipsey, & Freeman, 2004); systematic determination of merit, worth, and significance (Patton, 2008; Scriven, 1991); determination of what works for whom in what circumstances (Pawson & Tilley, 1997); the systematic investigation of quality for purposes of decision making (Yarbrough et al., 2010); and sense-making toward the goal of social betterment (Mark, Henry, & Julnes, 2000).

The diversity spans contexts, practice, designs, practitioners, and roles. Contexts range across all countries, cultures, and social classes, prompting the question of whether evaluations should always include attention to social transformation, equity, advocacy, and justice. Budgets range from zero to the millions of dollars; timeframes can be rapid or span decades. In practice, evaluators employ multiple approaches, collecting data in numerous ways, routinely responding to situations in the unique contexts where they work. Designs range from large-scale randomized control trials of mature programs to small-scale developmental studies of innovative efforts. Evaluation efforts engage practitioners with diverse skill sets from a range of disciplines and fields, backgrounds, and qualifications, including people with extensive training in program evaluation and those who became evaluators accidentally – and everything in between. Evaluators may serve consultancy, pastoral/counselling, mediation, truth telling, directive, or advocacy roles – just to name a few possibilities.

The result of this diversity is that evaluation has become a "public grazing area" (Crane, 1988, p. 469). Various sectors and disciplines co-opt aspects of evaluation or mistakenly promote one aspect of evaluation as representing the whole (e.g., cost benefit analysis in economics). Funders and sponsors may consider evaluation as a service industry rather than a distinct field of inquiry and set their own standards and deliver their own training (e.g., UNEG, 2008). Universities offer a wide variety of single "Introduction to Evaluation" courses matched to the needs of specific disciplines, while full degree programs more suited to the breadth of the evaluation transdiscipline rarely find a place outside of health, public administration, or education departments (LaVelle & Donaldson, 2010).

Funding for research focused on evaluation is difficult to come by; most resources for evaluation are dedicated to evaluation practice and therefore linked to clients' specific needs. The advancement of evaluation research generally relies on (a) academics who are willing to engage in research on the discipline and (b) students pursuing research degrees. Those research efforts are hampered by the diffusion of the literature on evaluation because literature databases are typically structured based on disciplinary boundaries, and evaluation, as a transdiscipline, contributes to and draws from all disciplines. As a result, empirical and theoretical works related to evaluation are distributed widely across topic areas and sector- and evaluation-specific journals, which may or may not be linked into current databases. Other evaluation-specific works are found dispersed across books, white and grey papers, organization-specific resources, and other areas that can be difficult to access. The broad and unsystematic distribution of the literature creates difficulty in producing comprehensive, replicable literature reviews upon which the advancement of every discipline is based. Indeed, evaluation is a nearly boundary-less space in comparison with research, other disciplines, and sectors, which have much stronger definitions of their domains.

In this diverse space, numerous developments over the past several years have fostered the professionalization of the field:

- The launch of peer-reviewed professional journals (e.g., *American Journal of Evaluation, New Directions for Program Evaluation, Evaluation Practice, Evaluation Review, Canadian Journal of Program Evaluation, Evaluation*)
- A dramatic increase in the number and variety of university-based evaluation programs and free-standing evaluation training and professional development opportunities (LaVelle, 2014; LaVelle & Donaldson, 2010, 2015)
- The development of over 200 voluntary organizations of professional evaluators (VOPEs) around the world, more than 20 international networks in evaluation, plus the International Organization for Cooperation in Evaluation (International Organization for Cooperation in Evaluation, 2017)
- The creation and two revisions of standards for program evaluation (Joint Committee on Standards for Educational Evaluation & Sanders, 1994; Stufflebeam, 1981; Yarbrough et al., 2010)

In recent years, the drumbeat of professionalization has grown as multiple VOPEs have simultaneously wrestled with questions of how to increase the number and quality of practicing evaluators and upgrade the field's status. Their contributions (both products and processes) attest to growing interest in providing viable ways for evaluators to establish their qualifications and build their knowledge and skills. Examples include the American Evaluation Association's (AEA) Guiding Principles for Evaluators (American Evaluation Association, 2004) and Statement on Cultural Competence (American Evaluation Association, 2011); the Canadian Evaluation Society's (CES) formal credentialing program for evaluators, and the European Evaluation Society's Voluntary Evaluator Peer Review (VEPR) (Bustelo, 2013; European Evaluation Society, 2013).

Despite these efforts, it can be argued that the field has not yet coalesced around how to address evaluation education and how to ensure the quality of (a) the formal education programs and (b) the people who graduate from them. In part this may stem from the lack of clarity about common definitions and explicit competencies outlining what constitutes high quality practice. While various professional development and formal education programs have designated core training topics, there is no "common core" of field-wide agreed-upon knowledge, skills, or dispositions required of program evaluators, and, in fact, many people now practicing evaluation may not even know that they are practicing evaluation or, worse, have little foundational knowledge of evaluation theories, ideas, or professional standards. Compounding the challenge of quality assurance is the lack of an accreditation process and/or an accrediting body for evaluation education and training programs, meaning there is no profession-level oversight except for the current efforts of the CES related to supporting their credentialing program. Individuals can be recognized as evaluators via the CES credential or certification programs in Japan and Thailand for school external evaluators.

Inputs

Evaluation education requires a variety of inputs. The components in the input section of the logic model discussed here are based on Schwab's (1973) commonplaces of a learning situation: learners, teachers, subject matter, and milieu, and the CIPP model strategy component. We have not provided an analysis of program structure or budget since they are unique to specific education programs.

Learners

Potential learners must first find their way to evaluation and identify viable opportunities for training and education. The pool of potential learners includes several overlapping groups:

1. Practicing evaluators of two types: (a) those who began to practice without any grounding in the field, often because their methodological skills were strong; and (b) those who completed some form of initial training, but who now need updating on recent developments (e.g., newly developed methods or approaches, methods for articulating criteria and setting standards)
2. People in academic settings, again including two types: (a) academics in a variety of subject areas who have solid disciplinary or methodological grounding, but lack knowledge or, in some cases, even awareness of the field; and (b) current undergraduate and graduate students in diverse disciplines and subject areas
3. "Accidental evaluators," i.e., people without training who are conducting evaluations because they have to (e.g., there was no one else to do the work, they were the last ones hired, the organization cannot afford to hire an outside evaluator)
4. Practicing non-evaluation professionals and community members, who are consumers and downstream beneficiaries of programs
5. Indigenous and other under-represented groups whom programs are often designed to benefit, yet are not well represented in the current population of evaluators (Symonette, Mertens, & Hopson, 2014)
6. Commissioners of evaluation, both individuals and commissioning bodies, meaning those who write Terms of References, Requests for Proposals (RFP) or Requests for Tender (RFT)

While it is important to note the possible overlap across categories, at the same time we must acknowledge the sizeable number of potential learners in these groups – all of whom may have different needs.

It is one thing to identify potential learners; it is another altogether to recruit them and retain them in evaluation training or degree programs (LaVelle, 2011). Once potential

evaluators and commissioners are aware of the field, several barriers to recruitment remain. In some places, access may be a concern; as the CES discovered when it established the Credentialed Evaluator program, there may not be evaluation education or training programs available near-by. While online offerings address this barrier, students who prefer face-to-face instruction may be hesitant to learn via computer. Another major barrier is the cost of evaluation education and training. People interested in entering the field may not have the resources to fund their own study, and, given the applied nature of our field, there is often little funding to support evaluation students, especially those who are engaged in part-time or non-degree study. A further barrier relates to the state of our field. Some may well believe that there is no need for training, education, or, for that matter, continuing professional development because there are few options for credentialing and certification (mentioned above), and few RFTs, RFPs, commissioners or contracts that require it.

Once students opt into an academic program or training options, they must be enrolled and retained. In contrast to follow-through students enrolling a graduate program, the needs and interests of returning professionals may pose particular challenges for retention. The nature of academic study and its language may not fit with professionals seeking evaluation skills, and, given its expense, there may appear to be no immediately tangible benefits (e.g., a promotion or a higher salary) since there are currently no requirements for advanced learning (e.g., certification, licensure). In addition, the nature of evaluation practice—which for some is part-time, drop-in/drop-out, or for others extremely demanding either as a full-time job or consultancies—may make it difficult to fit study in. If first nations and other under-represented populations are unsuccessful in connecting to a community of practice in any of the milieus (below), they may feel isolated and drop out, believing that they do not fit in.

Faculty

Faculty are a key input in the training of evaluators; however, limited research is available on who exactly is teaching evaluation. For instance, Davies and MacKay (2014) surveyed AEA's Teaching of Evaluation TIG members, but did not report any demographics or background information on the survey respondents, who were all teaching at universities in the US and Canada. Faculty members serve as a "primary method of socialization [into the evaluation profession] for students" (Fitzpatrick, 1994, p. 45). They do this not only through contact with students, but through the choices they make in terms of their prioritization of topics, skills, and content (Davies & MacKay, 2014). Based on Davis (1986b), we know that evaluation is being taught across disciplines, and there are certainly people teaching evaluation in universities who are not members of any professional organization related to evaluation. As a result, students may not be socialized into the profession because the faculty member teaching it may not have heard of the important concepts such as the Program Evaluation Standards (Yarbrough et al., 2010) or organizations such as AEA with ethics statements, competency frameworks, and other supporting resources that would connect them to the broader profession.

The nature of the university context also means that faculty members (a) are likely to be in a disciplinary silo, so may not even consider the need to look outside their discipline for evaluation knowledge to inform their teaching; (b) may not trained in education (pedagogy or andragogy), and (c) have their teaching outcomes measured by course-specific student evaluations, rather than documented learning gains or other indicators of teaching effectiveness. Thus, there are virtually no drivers within the university context to push faculty to improve their evaluation education performance through pedagogy or content. This means that current faculty members with a vested interest in professionalizing evaluation must drive any change in this area.

Subject Matter

In most cases, the individual faculty who teach evaluation courses determine the subject matter taught. We know from Davies and MacKay (2014) that learners will often take evaluation as (a) part of one course, (b) a full single course, or (c) a pair of courses, and that these will differ across the university programs where they are offered. Research in process by LaVelle, Sabarre, and Uhmans supports this premise, and the University of Melbourne provides an illustrative case. A search of the 2018 catalogue showed 12 evaluation courses across seven graduate programs, not including courses offered in evaluation-specific graduate programs. Based on the published required texts for those courses, a student's evaluation content could be dramatically different, ranging from only (a) establishing monitoring and evaluation frameworks (Goergens & Kusek, 2010; Markiewicz & Patrick, 2016); (b) content from the journals *Impact Assessment and Project Appraisal* and *Development in Practice*; (c) economic analyses (Drummond, Sculpher, Claxton, Stoddart, & Torrance, 2015; Gray, 2011); (d) evaluation as a part of program management (Kettner, Moroney, & Martin, 2017); or (e) a broad introduction to evaluation approaches (Owen, 2006). Even if the faculty member is familiar with the evaluation literature, students still may get only one perspective on evaluation based on existing texts: (a) impact and outcomes (Bamberger, Rugh, & Mabry, 2012); (b) determination of a program's overall value and impact (Davidson, 2005), (c) an in-depth exploration of evaluation approaches (Fitzpatrick, Sanders, & Worthen, 2011; Stufflebeam & Coryn, 2014), or (d) particular approaches (e.g., utilization [Patton, 2008], the CIPP model [Stufflebeam & Zhang, 2017], or theory-driven [Donaldson, 2007]).

The content and program structure of courses labeled with an evaluation focus has had some theoretical and empirical work over the past several decades. Empirical studies have focused on surveys of AEA members; two of the three recent studies (Dewey et al., 2008; Dillman, 2013) focused on the Graduate Student and New Evaluator TIG, so the

sample is skewed toward novices and those with formal education. What is not clear from the research done so far is what, other than a name, differentiates a full program from an evaluation course. Based on LaVelle (2014), several evaluation programs included only 1 or 2 evaluation specific courses, similar to what might be considered a concentration in other programs (cf. the University of Melbourne example, above).

Content in formal evaluation education is based on a primary discipline, with evaluation as a secondary focus. Based on LaVelle's (2014) analysis, it would be possible for someone to get a master's and doctorate in evaluation without any economic analysis methods, survey design, or qualitative methods. Research methods and evaluation approaches required in formal courses align with the epistemological stance of the discipline, (e.g., public policy has a greater emphasis on economic methods, education has a greater emphasis on qualitative methods, and evaluation-specific programs have a greater emphasis on evaluation theory and include more evaluation practicums) (extrapolated from Lavelle, 2014). In addition to the content, the milieu of formal education means that students will be expected to demonstrate performance on the skills and knowledge required under academic constraints, which may not fit with the needs of evaluation practice (Dewey et al., 2008).

Increasingly, content in courses within evaluation-specific programs is being mapped to competency sets. Beginning with King, Stevahn, Ghere, and Minnema (2001) and continuing with several VOPEs and other organizations (AES Professional Learning Committee, 2013; Aoteroa New Zealand Evaluation Association, 2011; Canadian Evaluation Society, 2010; Russ-Eft, 2008; UK Evaluation Society, 2013; UNEG, 2008), many have done the hard work of articulating evaluator competencies. These competency sets appear to have much in common (Stevahn & King, 2014) and generally cover the competency areas set out 30 years ago by Davis (1986a): technical skills (social science research methods), conceptual knowledge ("theories and practice essential to conducting evaluation and the use of its

results" [p. 6]), interpersonal and communication skills, and administrative skills (project management). Most of the current competency sets do not define or privilege evaluation-specific content (Davis' [1986] conceptual knowledge) in comparison to other competency areas. For example, while all competency sets include evaluation theory, most lack a clear definition of it. In particular, what some people think is theory (e.g., evaluation approaches), others do not (Smith, 2010). However theory is defined, it most often does not include explicitly evaluative reasoning. Not surprisingly then, most competency sets are missing explicit address of two key areas that some believe are essential to the task of evaluation: (a) valuation and (b) developing judgments and warranted arguments. In addition, the competency sets generally have not been prioritized to determine which domains or competencies are foundational for all evaluation practice and which, if any, are optional for particular contexts or disciplines. CES credentialing, for example, requires demonstration of education and/or experience across only 70 percent of the competencies within each domain (Canadian Evaluation Society, 2017).

Analysis of the most current published literature provided the following list of what professors are currently teaching in formal evaluation courses:

- Evaluation approaches. Respondents rated this the most important and reported that it was given the highest amount of time in introductory courses: Five plus hours (introductory courses 74%, advanced courses 51%) (Davies & Mackay, 2014).
- Practical evaluation issues. This was also rated as highly important and given the most time overall across introductory and advanced courses (Davies & Mackay, 2014), but it is unclear what issues or topics were included.
- Literature reviews (Dewey et al., 2008)

- Evaluation theory. Dewey et al. (2008) reported that theory was taught to less than half of job seekers and listed in less than half of job postings. However, employers said they want it and that it is missing. LaVelle (2014) reported that employers, particularly in the international context, request specific approaches, which may be considered a form of theory. Some of the incongruence may be related to the lack of agreed on definition of what constitutes evaluation theory.
- Research/evaluation design and methods. Dewey et al. (2008) reported this as taught, and job seekers reported they felt competent, but employers said job seekers were missing the connection to real-life design with budget and scope constraints. Employers also reported that a focus on multi-variate and advanced stats is generally not needed (Dewey et al., 2008), yet it makes up a large portion of the curriculum in most evaluation courses (LaVelle, 2014).
- Ethics, culture, professional standards, and cultural considerations. According to Davies and MacKay (2014), coverage of these topics was light, often a single class session or less, each, in one course. Meta-evaluation was rated as somewhat important and taught one day or less (60% of courses) or not at all (more than 20% of advanced courses and 30% of introductory courses). The coverage of evaluation ethics was similar. Professional standards got a bit more time in advanced courses (Davies & Mackay, 2014). Respondents rated cultural competence as important, but taught it for four hours or less (almost 80%).

An analysis of the current literature also provides a list what is *not* being taught:

- Measurement. While central to understanding design and interpretation of tests and surveys, this topic has no specific mention in competency sets and was not listed in the Davies and Mackay research.
- Writing (particularly for reports)

- Interpersonal skills (particularly for client and stakeholder relations). For example, 49% of Galport and Azzam's (2017) respondents reported needing more training in conflict resolution skills.
- Budgeting, project planning, and other aspects of project management (LaVelle, 2014)
- Project and team management (Dewey et al., 2008; Fitzpatrick, 1994; Sanders, 1986; Worthen & Sanders, 1991). Except for some technical aspects, the best learning in this area reported to date reportedly comes through conducting actual evaluations (Dewey et al., 2008; Dillman, 2013).
- Practical evaluation and research design (i.e., creating an evaluation that supports valid conclusions under time and budget constraints)
- Meta-evaluation. Seventy-five percent of respondents reported this as an area where they needed the most training (Galport & Azzam, 2017).
- Explicit documentation of teaching on valuing, the logic of evaluation (explicitly), and particularly evaluative synthesis

The implications of these subject matter gaps are wide ranging; a few are highlighted here. Research design training is not much good if evaluators cannot navigate achieving validity and trustworthiness in real-world conditions. The nature of our work means that we need to focus on the practical requirements of the real world. The light presence of measurement in evaluation-specific programs and its complete absence in the common one- or two-course curriculums offered within disciplinary degrees has implications for the quality of the data produced by surveys and evaluators' ability to interpret the responses accurately. The ability to derive and report a clear, well-supported conclusion about the value of a program is central to the task of evaluation, and evaluation courses and programs are mostly not teaching people how to do it. This affects our ability to influence clients and other

consumers of evaluation and the reputation of evaluation as a credible emerging profession. The lack of time invested in meta-evaluation, evaluation ethics and professional standards, and cultural competence is an indicator that socializing students into the profession may not occur in many evaluation courses. This has significant implications for the quality and integrity of evaluation practice. We cannot emerge as a profession if we do not educate students to recognize and strive for quality evaluation practice.

Milieu

Formal evaluation education is now being offered in a variety of milieus (settings). Definitions of these have been drawn from the official glossary of the Association for Talent Development[i] (2018) and expanded on where needed to describe the current evaluation education space:

- *Face-to-face* - The traditional classroom environment of an instructor and a group of students in the same location at the same time
- *Online*- Learning that occurs in a virtual space where people interact with curriculum and/or peers and instructors via computer connection using the Internet
- *Blended*- Learning events that combine aspects of online and face-to-face instruction. Examples include (a) intensive face-to-face sessions supported by online interactions and learning outside of those meetings and (b) "flipped" classroom scenarios, where the lecture material is delivered through online recordings, and face-to-face interactions focus on activities and exercises.
- *Distance education*- Educational situations where the instructor and students are separated by time and/or location and including delivery via synchronous or asynchronous means of instruction (e.g., written correspondence, text, graphics, audio- and videotape, CD-ROM)

Formal education has traditionally been face-to-face or distance. Institutions are now offering more blended study and fully online evaluation programs. Online programs face a challenge similar to that of distance education in that their student population is diverse and often located in remote areas, now accessible thanks to the prevalence of the Internet. Online access means an increased demand for e-books and resources, but publishers are often unwilling to make e-versions of research texts accessible to institutional libraries, which has implications for curricular choices.

Strategy

The final aspect of inputs to evaluation education is strategy, i.e., the decisions about how the other inputs will be combined into a plan of action to advance someone's learning. We have categorized strategy by who directs the process of learning: what is learned, when, and in what sequence. This categorization reveals three main sections with permeable boundaries where the role of decision making is shared (Figure 2). As discussed above, instructors make the decisions in formal courses and programs, as well as professional development. Peer and community-directed learning happens when an organized group makes decisions about what to read or learn or explore together; in self-directed learning individuals directs their own plans of study. Massive Open Online Courses (MOOCs) combine direction from university academics (who provide the content and design of the course) with community direction via crowd sourcing and other peer learning pathways made possible by the thousands of learners in each offering. In mentoring and apprenticeship, there is direction and agency from both the instructor and the individual learner, often around an independent project under the supervision of an instructor. Self-paced online study (Mason, 2015, 2017) provides a curriculum dictated by the instructor, but the learner chooses which modules to do, when, and the pace at which study progresses. None of the milieus is linked exclusively to one kind of strategy. For instance, within full, formal evaluation courses

students are likely to have the opportunity for self-directed projects with supervision (e.g., individual projects, capstone experiences, and theses [LaVelle, 2014]), and have the potential to organize peer learning or community groups.

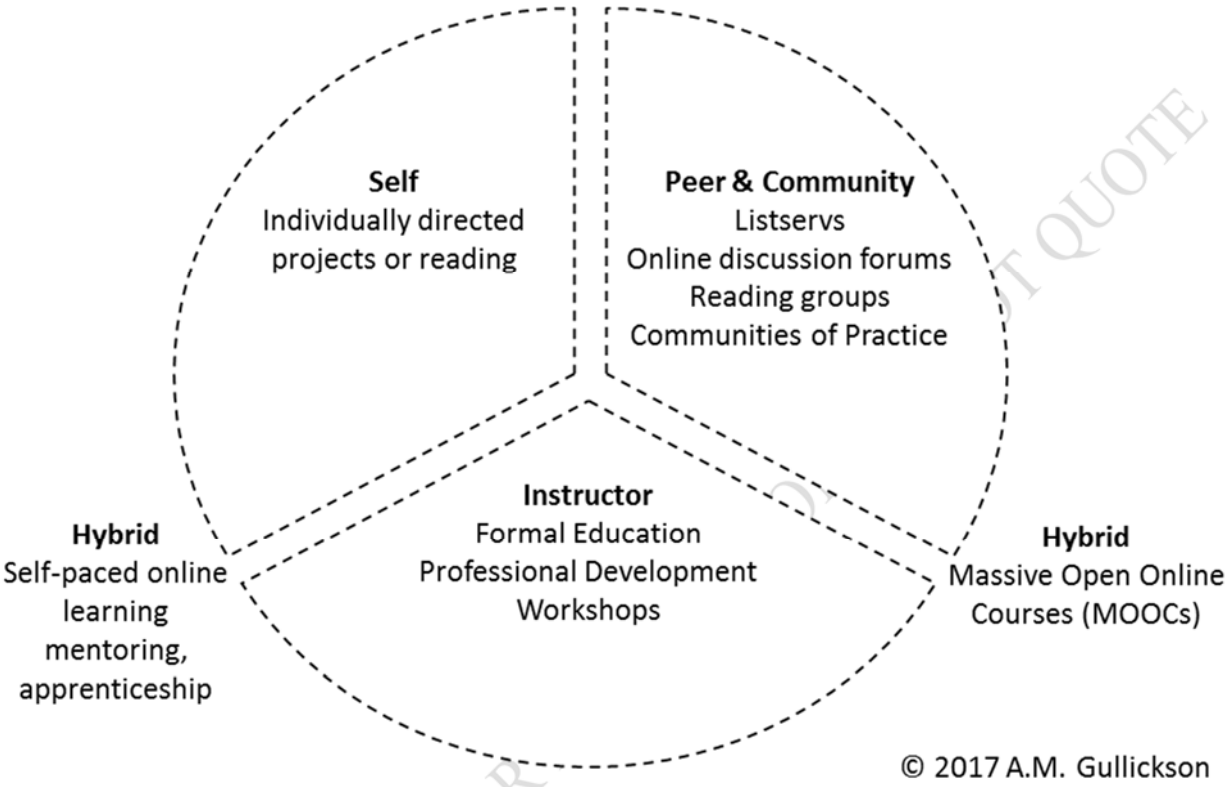

Figure 2. Locus of Instructional Strategy and Control

Process

Process is what turns inputs into products. The basis of any educational process is pedagogy—"the art, science or profession of teaching"[1]—and, in the case of evaluation, andragogy—"the art or science of teaching adults."[2] Bloom's taxonomy (Bloom & Krathwohl, 1956) and the Structure of the Observed Learning Outcomes (SOLO) taxonomy (Biggs & Collis, 1982) both provide a systematic way of describing how a learner's performance grows in complexity. Yet thus far, the development of competencies and the mapping of those to curriculum has provided no connection or analysis of evaluator

[1] https://www.merriam-webster.com/dictionary/pedagogy
[2] https://www.merriam-webster.com/dictionary/andragogy

knowledge and skills through the lens of cognitive complexity or application of a learning design underpinned by pedagogy to teach or assess them.

Few authors have discussed pedagogical strategies for teaching evaluation.[3] Three decades ago, Sanders' (1986) review of syllabi for evaluation courses in education found that lecture was the most common strategy. The literature is clear that for several areas of evaluation practice, learning through work on actual evaluations in the field is essential (Dewey et al., 2008; Dillman, 2013; Mertens, 1994; Worthen & Sanders, 1991). Aligned with this, Trevisan (2004) conducted a broad literature review on practical, hands-on training strategies and reported that evaluation skills were being taught through simulation and role play, single course evaluation projects, and practicums, preferably with supervision or mentoring. Brown (1985) and Brown and Dinnel (1992) proposed developmental progression and tasks for students in evaluation practicums, as well as a set of intervention strategies for their supervisors. Buckley, Archibald, Hargraves, and Trochim (2015) produced a similar analysis for evaluative thinking.

The "it depends" nature of evaluation means that those practicing it need to develop flexibility to choose among options (Brown, 1985). It follows, therefore, that evaluation education needs to provide (a) a clear understanding of the task of evaluation; (b) the options for conducting it; (c) the importance of alignment of a person or team's competencies with the requirements of the evaluand and the evaluation; and (d) the contingency devices (Shadish, 1994) necessary to make those decisions and create the necessary alignments. So far, no analysis has been done to determine the types of pedagogy/andragogy that best support these learnings, other than reports that field experience is essential for developing mature evaluation practice (Dewey et al., 2008; Dillman, 2013; Trevisan, 2002, 2004). A variety of good ways to teach each of these steps can likely be informed by pedagogy

[3] Patton's (2017) *New Directions in Evaluation* volume references pedagogy; however, it is focused on the broader implications of Freire's thinking for evaluation, rather than evaluation education or the education of evaluators specifically.

developed for other disciplines engaged in similar tasks (e.g., Brown, 1985; Brown & Dinnel, 1992).

Without articulation of the cognitive complexity of the various evaluator competencies, we cannot identify pathways to competence in practice. Due to the diversity of evaluation practitioners, we also need to be able to ascertain where learners need to backfill missing knowledge, unlearn or revise previous knowledge (e.g., research lenses), and otherwise fill in gaps. Without this background knowledge, we cannot identify the appropriate pedagogical strategies to scaffold learners, and our teaching is more likely to be less effective, less efficient, and therefore more expensive for the learners.

The small amount of publication and research on teaching and learning in evaluation is in stark contrast to the conversations in many other professions. Medicine, for example, has long debated and experimented with clinical teaching methods, some of which have now crossed into teacher and nursing education programs. Business, engineering, and psychology have journals devoted to debates about teaching and curriculum. Evaluation, due to its transdisciplinary nature, requires perhaps even more attention to pedagogy and informed debates about how we teach our curriculum. However, in the current state we have very limited empirical research on what constitutes good practice in evaluation education.

Products: Short- and Medium-Term Outcomes and Impact

The goal of evaluation education is to enable learners to develop (a) awareness of evaluation as a profession; (b) evaluation knowledge, skills, and dispositional attributes, including the ability to adhere to ethical practice; and (c) the ability to recognize and deliver quality evaluation practice. Producing people who can provide quality evaluation practice is one of the precursors to evaluation's being recognized as a profession. The proposed logic model and analysis above imply that there is interaction between and among the aspects of evaluation education to produce these desired outcomes.

Within higher education programs, outcomes are often demonstrated via assessments, which may measure students' theory, knowledge, and some practice skills, documenting student learning in specific areas of instruction. These results are typically not published; rather, the achievement of the qualification (e.g., certificate, degree) implies a passing level of learning. Standards for what constitutes a pass vary across courses, programs, and institutions. In the published research to date, the available outcome evidence is graduates' responses to surveys regarding the effectiveness of their formal education programs to prepare them in various competencies and for meeting needs of clients (Dewey et al., 2008; Dillman, 2013; Galport & Azzam, 2017). Neither tertiary assessments nor the published literature make the connection between academic performance standards and the developmental stages of skillful performance (e.g., novice, competence, proficiency, expertise, and mastery [Dreyfus & Dreyfus, 1980]). Thus, we have limited evidence about the impact of education programs to achieve the stated outcomes and no performance standards by which to judge those outcomes, making it impossible to make evidence-based claims about faculties' impact on student learning in courses and the impact of evaluation education processes overall.

Now What: Questions and Next Steps

The CIPP structure has provided a broad picture of the current state of evaluation education and implications for evaluation's emergence as a profession. In this section, we consider what is needed to move evaluation education from a faith-based initiative—as Patton (2008, p. 42) notes, "All initiatives are faith-based until they've been evaluated"— to one with evidence of its quality and impact. Our focus here is to highlight the issues and questions that need to be addressed and to suggest some next steps. These apply not only to formal education, but to professional development as well, since it forms a large portion of

typical evaluation education (Christie et al., 2014), which to date is covered by even less published research.

Without a shared understanding of the key tasks of evaluation, we cannot derive a common core for evaluation education, determine standards for quality, and assess impact. With regard to the common core, we need to identify: (a) what is at the core of evaluation as a transdiscipline; (b) which competencies are essential for individuals and/or teams; (c) whether any competencies are missing from or hidden within broad statements in the current taxonomies; and (d) any additional capabilities or dispositions necessary. To determine quality and impact we need to know: (a) what criteria define quality and enable us to measure the impact of evaluation education and evaluation practice (because the two are necessarily related); (b) whether the Program Evaluation Standards (propriety, accuracy, feasibility, utility, and evaluation accountability) are necessary and sufficient criteria for recognizing quality in evaluation practice; and (c) whether we need articulated performance standards on those criteria to enable evaluators and evaluation consumers to assess the quality of evaluations and evaluation reports. Consolidation and syntheses of research on how other disciplines have established their core and quality standards could inform this work.

Once a common core has been established, we need to examine the required knowledge, skills, attitudes, and other characteristics[4] (KSAOs [Brannick, Levine, & Morgeson, 2007]) with an eye to developmental progression. We need to (a) make the learning needs of this diverse community (including commissioners and consumers) visible so we can learn how to best address them; (b) determine the developmental stages of the KSAOs, if and how they build on each other within and across competency domains, good strategies for teaching and assessment (including the influence of milieu and strategy on

[4] Knowledge: level of mastery of a technical body of material; Skill: "capacity to perform tasks requiring the use of tools"; Ability: capacity to perform the required physical and mental acts that do not require tools; Other characteristics: "interests, values, temperaments, and personality attributes" (all quotations from Brannick et al., 2007, p. 97)

learning), and whether global assessment of competencies is possible; (c) discover strategies for teachers to understand their impact on student learning; and (d) identify feasible, evidenced practices for learning from field experience and the education needed for those who will mentor or supervise[5] students in field experiences. Our learning in these areas can perhaps be boosted by the huge amount of research and synthesis in education; the New Zealand government process of iterative synthesis is particularly relevant (Timperley, Wilson, Barrar, & Fung, 2007). Reviews of good practice in teaching critical thinking, argumentation and logic, and interpersonal skills will be critical to ensuring learners have the best possible support in mastering the common core.

Universities and other formal programs have a variety of opportunities for action:

1. Advocating that universities hire faculty who are members of VOPEs to teach evaluation within disciplines
2. Connecting via research and teaching – seeking out others teaching evaluation in different departments on campus to connect and network, discussing curriculum choices, and inviting participation in research and local evaluation events. The contacts made through that kind of research would spread awareness of evaluation as a profession, give us a better grasp of who is teaching what, and move us beyond surveying only ourselves (e.g., VOPE members). We also could encourage evaluation students to enroll in these courses to get a different perspective and share their own (and advocate for professionalism).
3. Developing interdisciplinary degrees and course sharing – interdisciplinary degrees like that at Western Michigan University enable evaluation coursework to deliberately maximize its transdisciplinary potential through faculty collaboration. Deliberate

[5] Rather than assuming a good evaluator will also be a good coach, these individuals will need instruction and practice in quality supervision. The transition phases and intervention strategies suggested by Brown (1985) provide a starting place.

integration of evaluation courses into other degree programs may also present an opportunity for the field.

4. Presenting at disciplinary conferences on the key issues in evaluation for the discipline, ways that evaluation can contribute to improvement, overall quality, and ability to demonstrate impact

The same questions and issues we have raised in formal education universities apply to PD opportunities. In this area, we need a better description of the current landscape: (a) who is offering PD inside and outside the VOPEs and universities, (b) the definition of evaluation in those courses, and (c) their pedagogy, content, and quality, including impacts on participants' learning and practice. Through examining PD and university education programs in tandem, we can fully understand where, how, and why evaluation education is taking place across the world and the impacts it is creating.

One of the common complaints in evaluation research is the rarity of evaluating the same program with multiple approaches. Making evaluation education an evaluand gives us an extensive network of people and programs in which to run various approaches and then make comparisons about the strengths and weaknesses of each. Thus, evaluation of evaluation education will allow us to meet multiple goals for improving practice.

Conclusion

Evaluation education is central to ensuring quality in evaluation practice and essential to the emergence of evaluation as a recognizable profession. In this paper, we have provided a description and analysis of its current state and the implications of that current state and highlighted potential next steps for future research and action. Clearly, further work is needed to move education forward so that it can more effectively address the learning and performance demands of our global context. Answering Stufflebeam and Zhang's (2017) impact questions will be key to understanding success:

> Were the right beneficiaries reached? Were the targeted needs and problems addressed effectively? Were the program's accomplishments and mechanisms to produce them sustained and affordable over the long term? Did the strategies and procedures that produced the accomplishments prove or at least show promise to be transportable, adaptable, and affordable for effective use elsewhere? (p. 24).

It is time to cultivate an evaluative attitude (Davidson, 2005) with regard to our education efforts. It begins with establishment of public agreement (Kegan & Lahey, 2001), i.e., a shared understanding about what constitutes appropriate conduct. The communal, agreed-upon nature of a public agreement will enable identification of mistakes, misunderstandings, and inappropriate action. Clear definitions of quality in evaluation practice and evaluation products as a public agreement would create leverage for ensuring that quality is protected from client demands, and enable individuals engaged in poor practice to identify learning opportunities. To move toward what we should be doing, we will need to turn our evaluation lenses to our own education and practice: setting criteria and standards, seeking evidence and listening to critique, and making adaptations to improve. These combined efforts will allow us to move from reliance on the integrity of individual practitioners to integrity as a profession.

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[i] ATD had been known as the American Society for Training and Development (ASTD) until 2014.

Appendix D: Online Working Conference: Charting the Future of Evaluation Education and Training

Contents

Access the LMS

To connect the face to face and online conference attendees, we've set up an online learning management system (LMS). I've already sent you a link to the LMS using the email address you provided. If you haven't received it, please check your junk mail for an email with the subject line: University of Melbourne LMS - External User access to: COM_01881. If you haven't used the University of Melbourne LMS before, you'll also get a separate email telling you how to set up your online access. To go directly to the LMS, click here: https://app.lms.unimelb.edu.au/webapps/blackboard/execute/courseMain?course_id=_370400_1 .

The Discussion Board has forums based on key research areas established at the MN conference. We will add to these through the online sessions and then use that space to carry on the conversations we've started.

Access the Online Sessions

To access the online sessions, use Zoom: https://unimelb.zoom.us/j/7863878039 If you need a phone number or other way to access the session, you'll find details in the LMS in the Zoom Room page. We'll upload the recordings of the sessions to that page for those of you who can't attend live.

A reminder of the schedule:

- Friday 6 April 0900 (9am) AEST
- Monday 9 April 2100 (9pm) AEST
- Tuesday 10 April 0000 (midnight) AEST
- Wednesday 11 April 1300 (1pm) AEST

To convert to your time zone:

https://www.timeanddate.com/worldclock/converter.html?iso=20180312T220000&p1=152

Draft Agenda (a rough estimate – sessions will differ)

Time	Activity
0:00	Welcome and introductions
0:05	Public agreements
0:10	*AJE* paper discussion
0:25	Presentations and discussion
0:45	Next steps – LMS, prioritizing, concrete research plans
1:00	Adjourn

Presenters and Presentation Titles (draft, subject to change)

Date	First	Last	Title
Friday 6 April	Susan	Staggs	Applying data-driven insights from the field of psychology to evaluation education
	Anne	Seraphine	Aligning the "Whats"--"What should be taught", "What is taught", and "What is measured": Issues of Evaluation Program Assessment using ePortfolios
	Bianca	Montrosse-Moorhead	The CHecklist for Evaluation-Specific Standards (CHESS) Project
Monday 9 April	Chari	Smith	Building Buy-In
	Melissa	Chapman Haynes	A cognitive appreticeship model of developing evaluation practitioners
Tuesday 10 April	Lauren	Wildschut	Insights into current issues of M&E training in South Africa
	Cheryl	Poth	Realizing a competency-based approach within evaluation education: An illustrative example of a curricular crosswalk from a Canadian doctoral course
	Libby	Smith	Aligning Evaluator Competencies with KSAs to Understand Skill Level
Wednesday 11 April	Kim	Castelin	Assessing Learning Outcomes in Online Learning for Monitoring and Evaluation Compared to Traditional Face to Face Workshops
	Michelle	Searle	Competency-based approaches as a pedagogical framework for evaluation

The Paper

The working conference was inspired by our collaboration to author the paper included on the following pages: Gullickson, A.M., King, J.A., LaVelle, J.M., Clinton, J.M. (under review). The Current State of Evaluation Education: A Situation Analysis. *American Journal of Evaluation*

We have been granted permission to share this paper while it is under review. If you wish to cite anything from it, please contact Amy at amy.gullickson@unimelb.edu.au

Please read the paper with these questions in mind – we will discuss as part of our opening activities in the online sessions.

1. The manuscript uses Stufflebeam's CIPP model to structure a conversation about the current state of evaluation education. For each component (i.e., context, input, process, and product), identify what you believe are the two or three most important points and the reasons why.

2. Again thinking about each component separately, what content or issues do you think are either missing or wrongly emphasized?

3. The "Now What?" section of the manuscript makes several suggestions for next steps in developing the field of evaluation education. Do you agree with the suggested steps? What other actions would you suggest? Which are needed most immediately?

4. What one statement in this manuscript strikes you most dramatically? Why?

Appendix E: Presentation Preparation Kits for MN and Online Conferences

Use this letter size template for your presentation slide

It will give you a bit more room to move AND it fits on an 8.5 x 11” printout.

Presentation rules

- You have 3 minutes. The three minutes starts when you start talking. The person presenting after you will keep time, give you a 30 second warning, and stop you at 3 minutes.
- You can use one slide or letter size sheet. This will be shared in hard copy so animation won't work.
- We will be breaking into small groups at tables for presentations, so please bring 10 hard copies of your slide to the conference.
- If you are willing to have it shared electronically, we will provide an online space for you to upload it. Details will be given at the end of the conference.

Tips for preparing your slide

- People can't read and listen at the same time. Protect your Intellectual Property (IP) and your listeners – don't put huge amounts of text on your slide. Use images, figures or other ways to describe your research.
- 14-16 point font is the smallest you should use.
- Put your name, affiliation, and email address on your slide so people can contact you.

To watch an example three minute presentation:
https://vimeo.com/254806836

Online Evaluation Education Working Conference

Information for Presenters

Key questions of interest

- What are foundational questions in evaluation education, and how can researchers and practitioners collaborate to describe and explore them together?
- What are the risks of not addressing evaluation education with data-driven questions and solutions?
- What research is currently underway on evaluator education/training, and what is needed?
- How can research on evaluation education be strengthened?

Things to keep in mind for slides in an online session

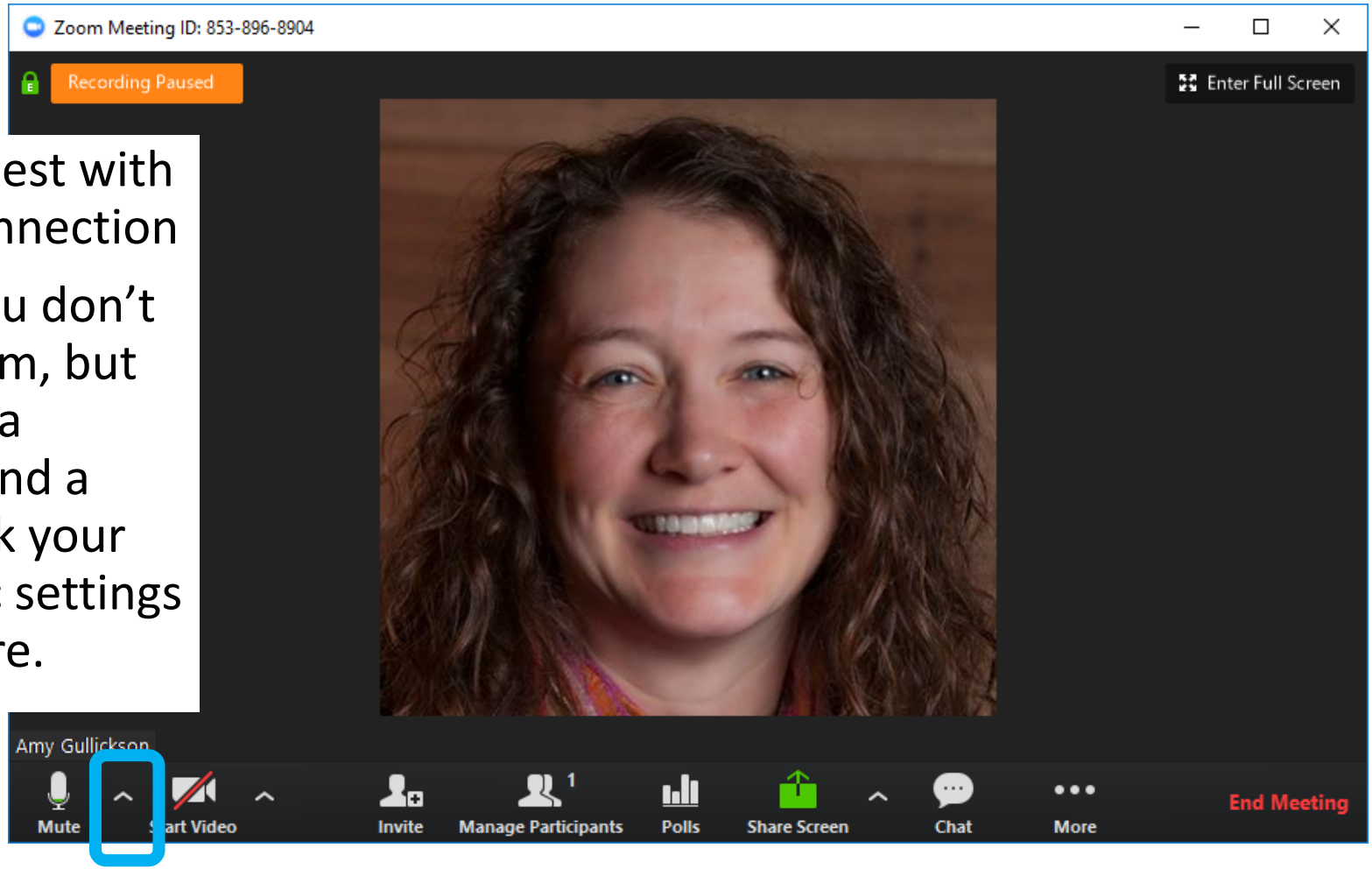
- People can't read and listen at the same time. Protect your Intellectual Property (IP) and your listeners – don't put huge amounts of text on your slide. Use images, figures or other ways to describe your research.
- People may watch presentations on their tablets or mobile phones, so while the text size and images don't have to be as big as for a projected presentation, don't make them too small. 14-16 pt font is probably the smallest you should use.

Presentation preparation and delivery

- Use one slide or letter size sheet (landscape view is best). No animation.
- You will share it from your own screen using zoom. If you won't be able to present from a computer or other screen you can share, email Amy at amy.gullickson@unimelb.edu.au.
- You have 3 minutes. The three minutes starts when you start talking. The person presenting after you will keep time and give you a 30 second warning.

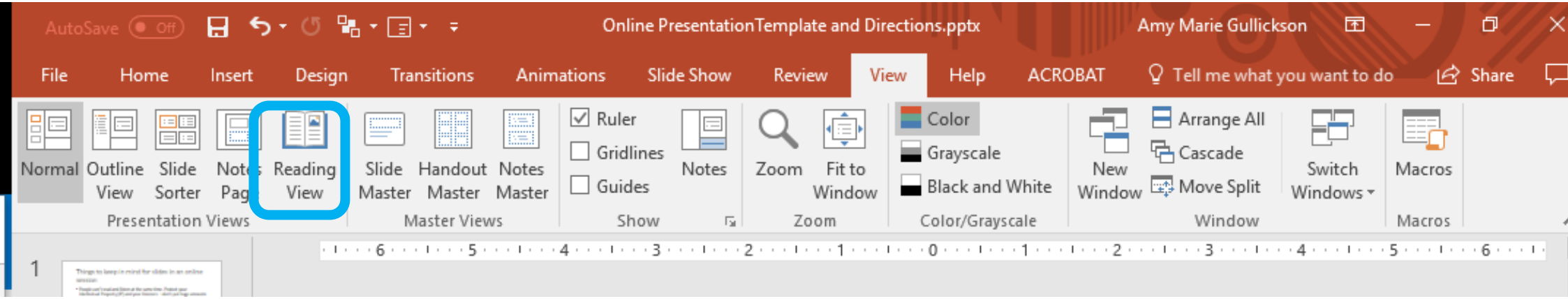
Using Zoom

- Zoom works best with a hard line connection
- To present, you don't need a webcam, but you will need a microphone and a speaker. Check your audio and mic settings by clicking here.



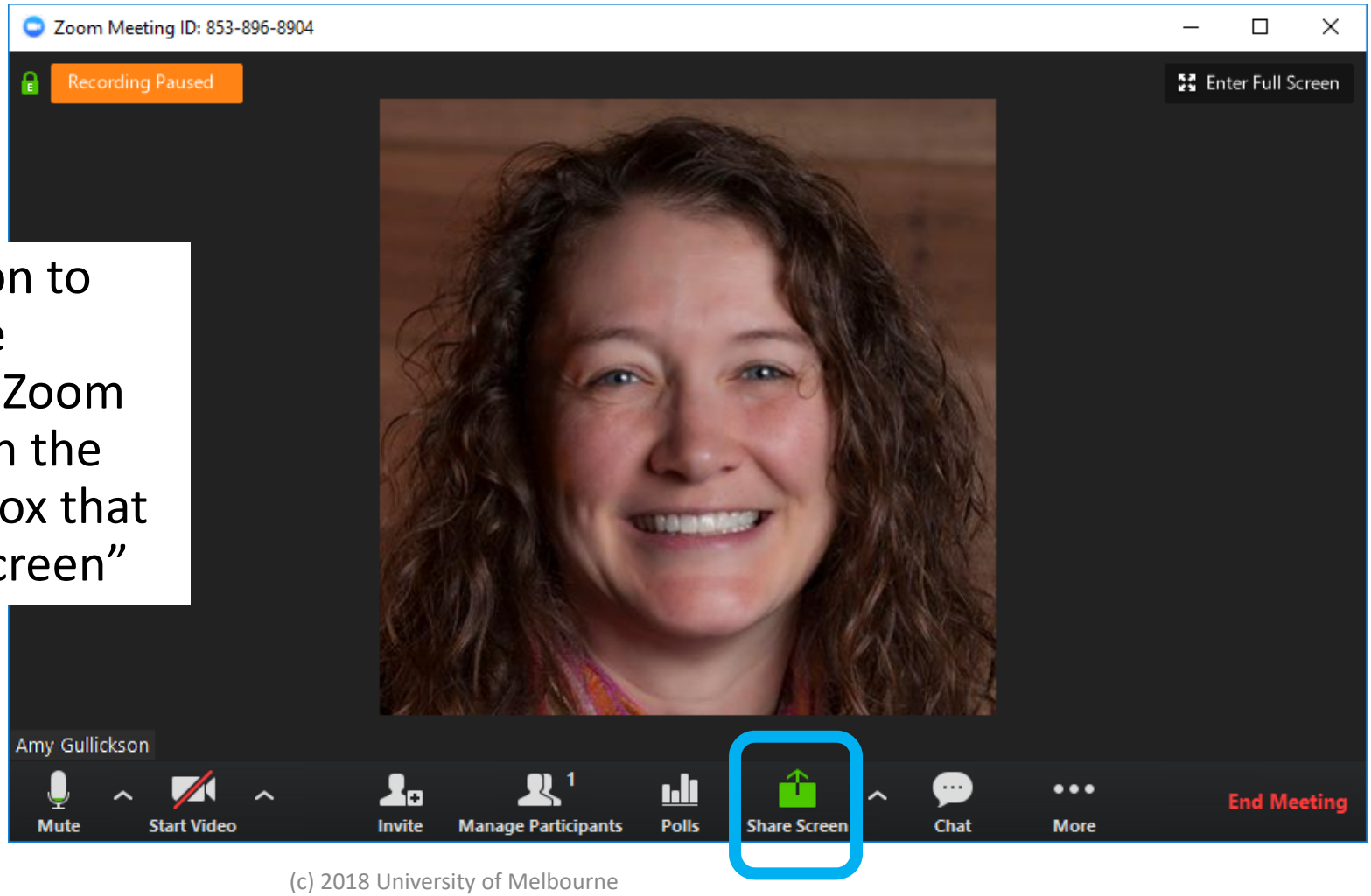
Using Zoom

- You will share your screen (ppt or document). If you are in ppt, the simplest way is to go to the View tab, choose “Reading View” and advance to your slide. Presentation view may take over your whole screen and make it tricky to navigate between Zoom and your presentation.



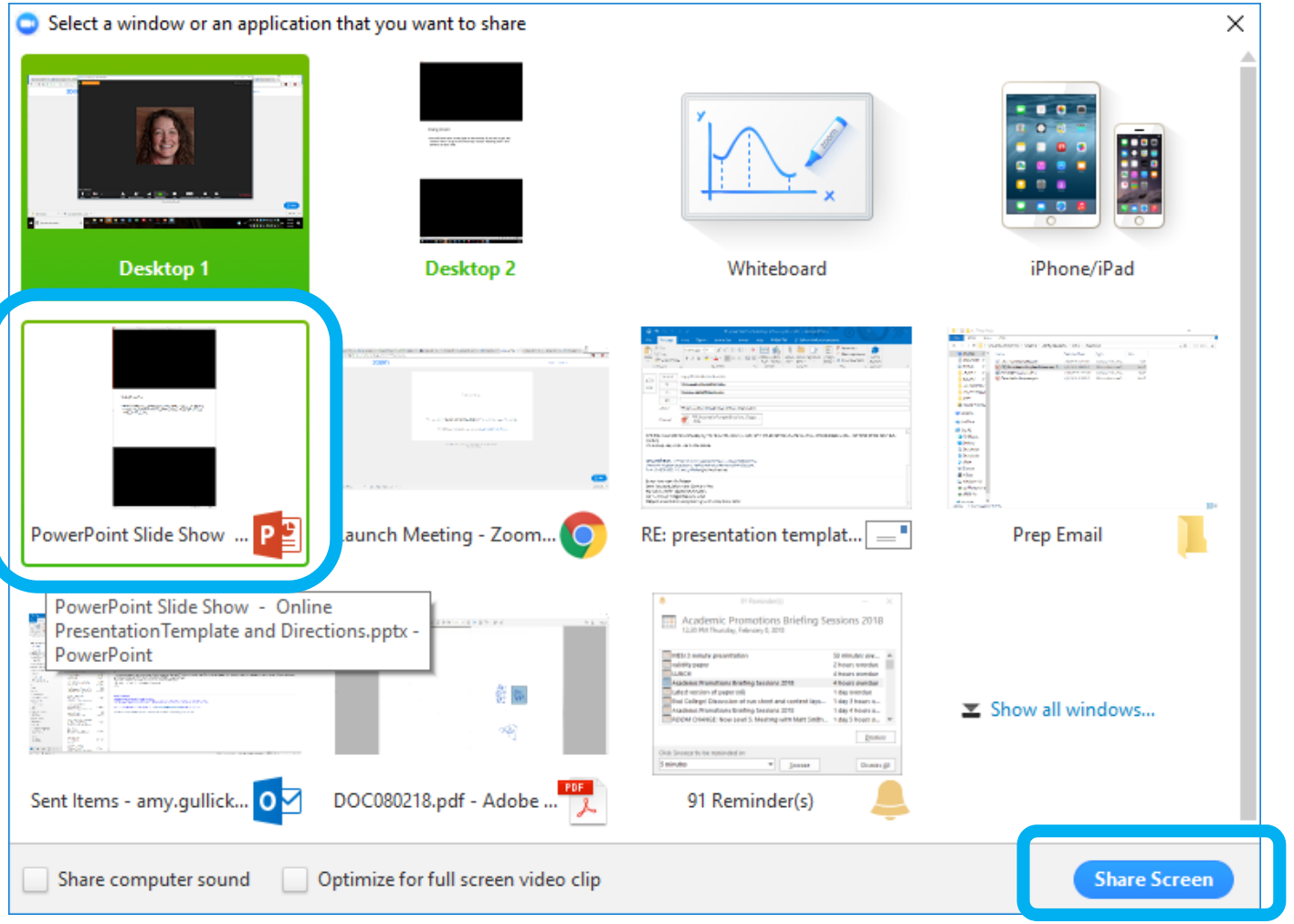
Using Zoom

- When you're on to present, at the bottom of the Zoom screen, click on the happy green box that says, "Share Screen"



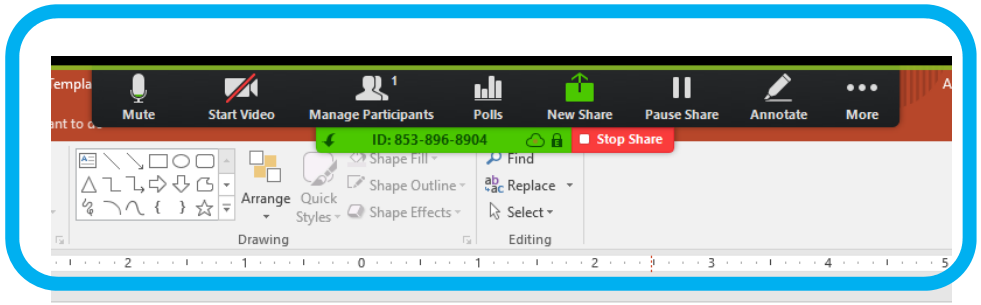
Using Zoom

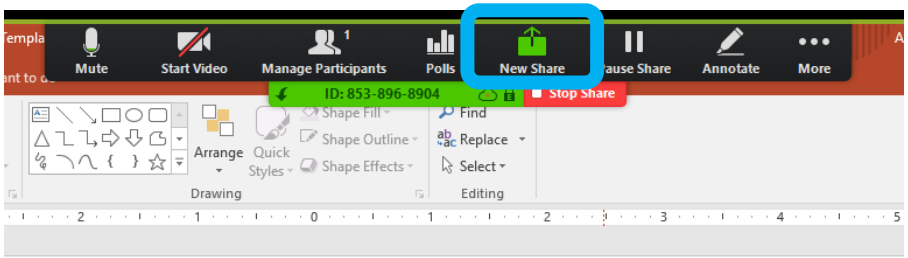
- In the window that pops up, choose the app where your slide/document is rather than choosing the desktop. This gives you a bit more flexibility with your monitor so you can keep your notes open.
- Click Share Screen on the bottom left and you're ready to go!

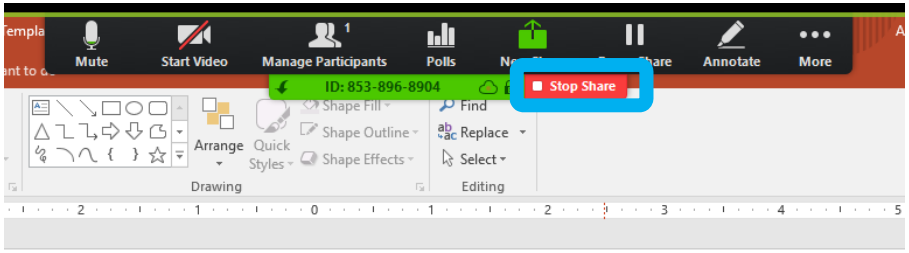


Using Zoom

- Once you are sharing your screen, the Zoom menu moves to the top of your screen.
- If things get wonky, do a New Share or Stop Share
- When you're done presenting, click on Stop Share.







Conference Proceedings

- We are going to publish a joint conference proceedings for the online and MN groups. This will consist of your presentation slide and a 1000 word summary
- Here's how to submit:
  - The email address you provided has been added to the online Learning Management System (LMS) and you should have received an email with the subject line: University of Melbourne LMS - External User access to: COM_01881. If you haven't received it, check your junk mail. If you haven't used the University of Melbourne LMS before, you'll also get a separate email telling you how to set up your online access.
  - Once you're on the LMS use the Conference Proceedings page to upload your slide and 1000 word summary of your presentation.

Appendix F: Public Agreements and Processes (from the Unimelb LMS Community)

Agreements and Processes

Evaluation is very rarely an activity done alone. Even if you're a one-man or one-woman evaluation show, you will be interacting with clients, participants, community members, etc throughout your evaluation process. I find there are few things that can ease those relationships if they are done at the start, and so we're using them here. The first is being clear about expectations (norms), and the second is public agreements. Finally, we suggest a process that may be useful in helping others reach more clarity about their ideas or plans.

Expectations (norms)

Professor Stevahn brought the LEARN acronym to the Minnesota session to describe behaviour in the community we were building. In the initial presentation and discussion of the norms on the Monday night of the Minnesota session, the participants added the S:

> **L**isten to build trust and understanding—*acknowledge/honor what others share*
> **E**ngage diversity—*seek and honor diverse experiences, backgrounds, perspectives*
> **A**ppreciate contributions—*seek and acknowledge alternative possibilities*
> **R**espect each other—*be attentive/humble/responsive; extend positive regard; cite others when you use their content or ideas*
> **N**egotiate issues constructively—*nurture cooperative problem solving*
> **S**mile and have fun – *enjoy the opportunity to work in community*

Public agreements

Public agreements is an idea from Kegan and Lahey (2001). Public agreements help us uphold our norms by providing a way to address the typical issues that arise in community. Use these whenever you need them to make sure the space we create together is protected and productive. We'll start with two: Squirrel, and Chatham House Rule. Others may emerge in our life together. Use the Discussion Board to suggest additions.

Discussion - Squirrel

Squirrels* are distracting, which is why Squirrel is my code word for when someone takes a discussion off on a tangent. If you think someone is off topic in discussion, you can say "Squirrel." This code word is a group way to help keep us on task and focused – and it gives the squirrel a chance to explain how what he or she is talking about is related to the topic, or confess that it's not and let the group get back on track. You will probably need to use this on me (Amy) at some point! Be gentle in your use, please.

*Why squirrels? See the movie "UP!" http://www.youtube.com/watch?v=fgslwdHxews&NR=1 at 2:36 and https://www.youtube.com/watch?v=Foi3Hblg21s

Chatham House Rule

Chatham House Rule is important because part of what we'll work on and discuss in this community are issues from your actual evaluation education practice, with clients, or in your organization. The Chatham House Rule means that we can have those discussions in safe space. Here's the rule quoted from their website: "When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed."

See more at: https://www.chathamhouse.org/about/chatham-house-rule?gclid=CjwKEAjwubK4BRC1xczKrZyj3mkSJAC6ntgrr_nU-8g4DTRKJYTD1KaNfaic3aWKQz4bX8qKwVoMLhoCTDzw_wcB#sthash.KOYRUAlW.dpuf

Process – the clearness committee

I (Amy) believe that one of the things that differentiates excellent evaluators from good evaluators is the questions they ask. While it's important to give clear and specific feedback, quite often it can be as valuable to ask a question that helps someone think more deeply about their idea, project, program, or evaluation process. The Quaker practice for personal discernment called the clearness committee (http://www.couragerenewal.org/PDFs/Parker-Palmer_Clearness-Committee.pdf) provides a different way to think about interacting with your colleagues in this community, and in your evaluation practice. In a clearness committee interaction, one person gives a brief summary of his or her plan, and then the other committee members may speak, but can only offer questions. I invite you to give this a try in discussion board threads and live sessions.

In these cases, the job of the readers/listeners is to help the presenter think through the challenges presented by her or his design/idea/research questions and how to address them – by asking thoughtful questions. At the heart of this exercise is the practice of learning to ask questions that help generate clarity for the presenter. You may find this challenging, but it can be a fruitful process.

References

Kegan, R., & Lahey, L. L. (2001). *How the Way We Talk Can Change the Way We Work: Seven Languages for Transformation.*