

South African Monitoring and Evaluation Association

DRAFT Evaluator Competency List

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Domains

1. Understanding the evaluation context (local, national and global): understanding the unique circumstances and settings of evaluations and their users/stakeholders at the appropriate level (e.g. local, national, regional and/or global levels).
2. Understanding the evaluation context (organisation): Understanding the unique circumstances and settings of evaluations and their users/stakeholders at organisational level.
3. Understanding the evaluation profession and professional bodies: interaction with the evaluation community - professional bodies and other evaluators - and knowledge of key documents e.g. standards and guidelines and ethical codes that guide evaluation practice.
4. Managing client and stakeholder relationship: Interpersonal skills evaluators need to engage and communicate effectively with clients, consumers and stakeholders taking into consideration their culture and their demographic attributes (e.g. race, gender, location and age).
5. Professional practice: Skills, knowledge and attitudes that make evaluators distinct as practicing professionals such as reflective practice, unpacking programmes theory and applying systems thinking tools.
6. Conducting an evaluation (doing the evaluation): the technical aspects of inquiry such as framing questions, designing studies, sampling, collecting and analysing data, interpreting results, and reporting findings.
7. Managing an evaluation: Project management skills evaluators needed to effectively negotiate, scope, manage and complete an evaluation.

Competency Domain: Understanding the Evaluation Context (Local, National and Global)

1. Has a good understanding of national M&E policies and frameworks (e.g. GWME framework)
2. Has a good understanding of the procurement and contracting processes for evaluation studies
3. Has a good understanding of the relevant sector policies and strategies (e.g. Health or Education) in South Africa as these pertain to evaluation work
4. Has sound knowledge of national development policies and principles (e.g. Ubuntu, Batho Pele, NDP, SDGs)
5. Has good understanding of codes of practice and legislation that pertains to businesses that engage in development work in South Africa

6. Has sound knowledge of intergovernmental relations and their influence on evaluations across all levels of governance
7. Has good understanding of policies, institutions, and organisations that shape the international development context in which the evaluand / organisation operates (e.g. Sustainable Development Goals, funding country legislation, rules around funding such as Official Development Assistance).
8. Has good understanding of linkages between 'local' or 'community', 'national', 'sub-national' 'global' contexts'

Competency Domain: Understanding the Evaluation Context (Organisational)

1. Has a good understanding of the philosophy and ethos of the client and/or donor/funder organisation
2. Has good subject specific content knowledge (e.g. health, education)
3. Has a good understanding of how different organisations (NGO's, donors/funders, companies, government departments) work and the relationship between different functions
4. Has a good understanding of the M&E system within the organization

Competency Domain: Understanding the evaluation profession and professional bodies

1. Has sound knowledge of and applies key principles of professional documents (standards, ethical codes and guiding principles) in evaluation studies
2. Is a member of a Voluntary Organisation for Professional Evaluation (VOPE) (e.g. SAMEA)
3. Contributes to the strengthening of the field of evaluation through knowledge-sharing (e.g. publishes, presents at seminars and conferences)
4. Builds the capacity of others as is appropriate (e.g. participatory evaluation processes, mentoring)
5. Contributes to the promotion of the evaluation profession amongst stakeholders who can benefit from learning through evaluation

Competency Domain: Managing Stakeholder and client relationship

1. Is politically savvy and understands the politics of development and evaluation (in all types of evaluations ranging from an evaluation for a single client or project to joint evaluations between different organisations with different cultures)
2. Is able to recognise and deal with key contextual issues and take these into account throughout the evaluation process (e.g. race, gender, sexual orientation, beliefs and values, politics, economics, and power/privilege)
3. Develops collaborative and co-operative relationships with project team members (the team(s) that manages the intervention)
4. Is able to identify and engage all relevant stakeholders taking into account their different worldviews, norms, values and knowledge systems
5. Is sensitive to and able to manage any conflict that may arise as a result of the evaluation activity.

6. Communicates effectively with stakeholders (e.g. communication protocols, presentations)
7. Is able to disseminate findings to client and stakeholders in appropriate formats

Competency Domain: Professional Practice

1. Has sound knowledge of and can apply evaluation theories (e.g. Theory Based Evaluation, Realist, Utilization Focused Evaluation)
2. Has sound knowledge of and can correctly use key evaluation concepts and definitions
3. Acts ethically throughout an evaluation process
4. Carries out on-going reflection on practice (e.g. about own experience, biases and values)
5. Is able to unpack programme theory where necessary (e.g. logframe, Theory of Change)
6. Is able to apply systems thinking tools where necessary (e.g. outcome mapping, causal loop diagrams)
7. Understands the difference and interdependency between monitoring and evaluation
8. Is able to develop and use monitoring systems
9. Is able to develop an M&E framework

Competency Domain: Conducting an evaluation

1. Has strategies to promote evaluation use and uptake
1. Engages all relevant stakeholders taking into account their different worldviews, norms, values and knowledge systems
1. Is able to develop and articulate appropriate evaluation questions
2. Has a good understanding of different evaluation designs (e.g. experimental, quasi experimental and mixed methods)
3. Has a good understanding of different evaluation types (e.g. process, outcome and impact)
4. Is able to recommend an appropriate methodology within budget, personnel and time constraints for an evaluation
5. Is able to identify appropriate primary and secondary data sources
6. Is able to select and apply relevant selection and/or sampling strategy
7. Can develop feedback loops to improve data quality
8. Understands data management systems and associated quality requirements
9. Can assess data quality in terms of relevance, validity, timeliness, integrity, precision, and completeness
10. Is proficient in a number of data collection methods (qualitative and quantitative)
11. Is able to analyse data in a rigorous and credible manner (quantitative and quantitative data)
12. Is able to interpret findings and make recommendations in a fair and balanced manner and draw appropriate evaluation conclusions while providing justification of how findings were reached
13. Is proficient in writing clear and credible evaluation reports
14. Displays appropriate cross-cultural competence and cultural sensitivity

Competency Domain: Managing an evaluation

1. Is proficient in planning evaluation studies (proper work plans, identification of milestone and deliverables)
2. Is able to develop and respond to Terms of Reference for evaluations
3. Understands how budgets influence evaluation design
4. Is able to develop an appropriate evaluation budget
5. Can draft an appropriate and clear contract that prevents scope creep, budget overruns and tampering with evaluation findings
6. Is able to put together a culturally competent evaluation team that has the relevant knowledge, skills and experience
7. Understands how to supervise or co-ordinate evaluation team members
8. Monitors evaluation progress
9. Able to put in place strategies to provide feedback to stakeholders and respondents
10. Delivers the evaluation report on time