Evaluation Competencies for Evaluation Specialists

1. Technical Leadership

- Acts in accordance with USAID ADS mandatory and advisory guidance regarding evaluation planning and use.
- Speaks authoritatively about evaluation planning and utilization in Mission/Office program strategizing, program planning and implementation.
- Demonstrates sufficient knowledge of evaluation purposes, designs and methods to guide Mission decisions on evaluation.
- Manages and works with a variety of internal and external stakeholders in planning, managing and using evaluation report findings, conclusions and recommendations.
- Provides evaluation training, mentoring, coaching and technical assistance for USAID and partner staff.
- Demonstrates familiarity with developments in the larger evaluation community, including DAC evaluation standards, strengths and limitations of mainstream and emerging evaluation practices, and knowledge of American and International/Regional evaluation associations.

2. Evaluation Planning

- Acts in accordance with USAID Monitoring and Evaluation requirements and practices, and understands difference and relationship between Monitoring and Evaluation in the USAID context.
- Integrates evaluation planning into strategic, program and project planning in accordance with USAID requirements and policies.
- Prepares evaluation Statements of Work that meet USAID standards.
- Emphasizes the need for evaluation baseline data collection as part of the program/project design process.
- Utilizes correct criteria for determining if and what kind of evaluations may be needed and when.
- Estimates resource (funding, personnel, time) requirements and plan for same in the evaluation planning process.
- Distinguishes between outcomes, results and impacts as used in evaluation terminology.
- Develops and operationalizes evaluation questions based on the evaluation's purpose; and links these questions to the evaluation design.

3. Evaluation Designs

- Advises on the different utilities and relevance of formative and summative evaluation designs.
- Applies different evaluation designs depending on level of rigor required in developing evaluation findings and conclusions.
- Applies different kinds of evaluation designs that will address the "counter-factual" hypothesis regarding program/project results or impact.
- Selects and utilizes experimental and non-experimental evaluation designs depending on the evaluation's needs.
- Applies various evaluation designs such as RCT, QED, Mixed Methods, Rapid Appraisal, Case Study, Interrupted time series and longitudinal, Panel, and Cross sectional designs when appropriate for a given evaluation.
- Knows and can construct a program/project theory of change to inform evaluation design selection.
- Identifies opportunities for participatory evaluation design involving a wide range of stakeholders.

4. Evaluation Data Collection and Analysis Methods

- Identifies standard sources of bias that effect data validity using different methods.
- Distinguishes between standard types of statistics and types of quantitative data used to present and analyze evaluation findings. This includes frequency distributions, cross tabulation, significance tests, and variance analysis.
- Uses qualitative data when applicable and advises on qualitative data collection methods and good practices (including interview skills, focus group facilitation, and survey design and response categories).
- Appropriately uses qualitative data analysis techniques including coding.
- Advises on various sampling techniques (such as random, stratified, and purposive) and their applications and relevance for a selected evaluation or methodology.
- Advises on the utility of various types of data collection and analysis tools using computer software and IT. (e.g., SPSS, Survey Monkey, Computer assisted Content Analysis)

5. Evaluation Report and Utilization Management

- Recognizes the difference between evaluation findings, analysis and conclusions in evaluation reports.
- Exercises quality control management during the review and comment phase of an evaluation process.

- Advises on the development and utilization of an evaluation utilization plan for ensuring that evaluation results are considered by decision makers and other stakeholders.

6. Personal and Social Competencies

There is no doubt that the technical competencies are of utmost importance in ensuring strong evaluation design, implementation, management, and utility. That stated, professional evaluators need more than technical skills in tools and methodologies in order to guarantee a smooth, accurate, and useful evaluation. Personal and social competencies are essential in this respect, and may be particularly relevant for the Evaluation Specialists targeted in this training. Although the Social Impact team will not be teaching explicitly to these skills during the two-week EES course, the importance of the competencies listed below should not be underestimated.

Cultural sensitivity
- Displays cultural sensitivity when selecting the evaluation team and in designing and implementing an evaluation
- Exercises cross-cultural competency in interpersonal interactions and applies this to the evaluation's context
- Includes all relevant stakeholders to the extent possible

Communication
- Uses strong written, verbal, and listening skills to convey questions, findings, and recommendations
- Communicates effectively with evaluation stakeholders using the appropriate language

Diplomacy
- Demonstrates an ability to negotiate and resolve conflicts between stakeholders, clients, and the evaluation team
- Solves problems as they arise while taking into account the various needs of different stakeholders
- Respects differences among stakeholder groups
- Balances client and stakeholder needs

Analysis
- Utilizes systematic thinking, logic, intelligence, and research to analyze complex situations and data
- Exercises sound judgment when making decisions and drawing conclusions.
- Examines assumptions and externalities accurately

Teamwork and Leadership
- Facilitates constructive interpersonal interactions within the evaluation team and with diverse stakeholder groups
- Manages teams with initiative and leadership
- Encourages cooperation between and within evaluations
- Protects confidentiality and/or obtains informed consent of informants and participants

Resource Management
- Manages time efficiently and prioritizes tasks
- Allocates and manages human and financial resources effectively and efficiently

Integrity
- Upholds the integrity of the evaluation process, ensuring objectivity and accuracy of results and findings to the greatest extent possible
- Treats stakeholders with respect and honesty in all interactions
- Adheres to the highest technical standards possible, acknowledging and accurately representing findings, methods, limitations and shortcomings
- Discloses values, interests, and conflicts of interest when appropriate and relevant