

Situational Awareness and Interpersonal Competence as Evaluator Competencies

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Gabriela L. Garcia¹ and Laurie Stevahn²

Abstract

This article reports research that examined the meaning of two broad evaluator competency domains. The first is *situational awareness* (SA) that focuses on understanding the unique contexts of evaluations and their users/stakeholders. The second is *interpersonal competence* (IC) that focuses on social skills needed for constructive interactions in conducting program evaluations. This research employed a qualitative design in which 13 experienced and skilled evaluators, purposively sought from varied professional contexts, participated in semistructured interviews that elicited thick descriptive narratives on what contributes to effective SA and IC in actual practice. Results revealed seven key factors pertinent to evaluator competence in these domains, plus the following three deeper dispositional elements underlying effective practice: (a) commitment to service, (b) humility as a learner, and (c) dedication to developing trust.

Keywords

evaluator competencies, evaluator competence, evaluation practice

What constitutes a competent evaluator? Over the past decade, this topic has sparked discussion and debate within evaluation communities around the world. Early interest by some scholars who broadly outlined possibilities (e.g., Kirkhart, 1981; Mertens, 1994; Patton, 1990; Scriven, 1996; Smith, 1999, Worthen, 1994) shifted to widespread interest across the field when the Essential Competencies for Program Evaluators (ECPE; Stevahn, King, Ghere, & Minnema, 2005) emerged as a comprehensive taxonomy of knowledge, skills, and dispositions deemed necessary for effective evaluation practice. Since then, numerous evaluation organizations, associations, and societies worldwide have developed, adopted, and are using evaluator competency frameworks in their own contexts for a variety of purposes.

This article reports on research that examined how experienced program evaluators understand *situational awareness* (SA) and *interpersonal competence* (IC), both deemed essential to competent practice. First, we define *competence* versus *competency*, identify existing evaluator competency

¹ Education Development Center, Chicago, IL, USA

² Seattle University, Seattle, WA, USA

Corresponding Author:

Gabriela L. Garcia, Education Development Center, 770 N. Halsted St. #205, Chicago, IL 60642, USA.

Email: gabrielagarcia@edc.org

frameworks, and provide a rationale for examining SA and IC specifically. After describing the research methodology, we report and discuss the significance of the results. Finally, we note strengths and limitations of the research and suggest future steps for examining, understanding, and using evaluator competencies in professional practice.

Competence Versus Competency

Typically, the terms competence and competency signify an individual's ability to do something well, especially demonstrate standards that define a field of professional practice. Competency, or its plural form competencies, is more of a practical term that includes specific criteria, such as knowledge, a skill, or an attitude, that contributes to effective job performance (Russ-Eft, Bober, de la Teja, Foxon, & Koszalka, 2008; Wilcox, 2012). Competence, more of an abstract term, refers to the "totality" of competencies—the "knowledge, skills, attributes, behaviors, and attitudes demanded in a particular undertaking and the ability to orchestrate these in addressing the problems one faces" (Schwandt, 2015, p. 125). A review of the competence/competency literature, however, reveals that there is no one way to define these terms, as few agree on exactly what they mean (Garcia, 2016; Parry, 1996).

Although we recognize a distinction between the terms competence and competency and acknowledge conceptual ambiguity from interchangeable use in the literature (Mulder, 2014; Parry, 1996; Weinert, 2001), we also see value in attempting to articulate fundamental knowledge, skills, and dispositions that enable evaluators to conduct evaluations successfully. In fact, we believe that developing and adopting competencies holds promise for (a) creating a shared and common language about work qualifications (McLagan, 1997); (b) clarifying role responsibilities and expectations; (c) recruiting, hiring, and/or training evaluators; (d) assessing performance; (e) developing effective university evaluator education programs (Kaesbauer, 2012); (f) guiding ongoing professional development (Stevahn et al., 2005; Wilcox, 2012); and (g) further professionalizing the field (Altschuld, 1999; Stevahn et al., 2005; Worthen, 1994).

Evaluator Competency Frameworks

In the 1990s, a group of researchers in the United States, independent from any evaluation association, systematically identified and validated a set of evaluator competencies (King, Stevahn, Ghere, & Minnema, 2001). Soon thereafter, they revised, further validated, and named the framework the ECPE (Stevahn et al., 2005). The ECPE presented six major domains deemed critical to effectiveness—namely, *professional practice*, *systematic inquiry*, *SA*, *project management*, *reflective practice*, and *IC*—each containing lists of specific competencies. Since its publication in 2005, the ECPE has influenced national and international conversation on the development of evaluator competencies as evaluation associations/societies and government agencies have developed and validated their own sets of competencies, responsive to their distinct contexts and grounding values.

The resulting worldwide proliferation of evaluator competency frameworks listed in Table 1 has made it possible to conduct cross-comparisons, revealing similarities overall confirming five major competency domains as foundational to evaluator effectiveness. Early cross-comparisons conducted by Stevahn and King (2014) and King and Stevahn (2015) identified the following as major domains foundational to evaluator effectiveness: *professional*, *technical*, *situational*, *management*, and *IC*. Subsequent work has provided corroboration. For example, Garcia (2015) used these five domains as a rubric to better understand the first 12 evaluator competency frameworks in Table 1 (the final framework listed had not yet been developed). She found that, despite variations in how competencies are written and organized, they predominantly address all five domains, albeit somewhat differently, given unique contexts and perspectives.

Table 1. Evaluator Competency Frameworks.

Framework	Developers	Year
1. Essential Competencies for Program Evaluators	Stevahn, King, Ghere, and Minnema (2005; group of researchers at the University of Minnesota, Minneapolis, USA; revised from King, Stevahn, Ghere, & Minnema, 2001)	2005
2. Evaluator Competencies and Performance Standards	International Board of Standards for Training, Performance and Instruction (ibstpi 2006; Russ-Eft, Bober, de la Teja, Foxon, & Koszalka, 2008)	2006/2008
3. Recommendations on Education and Training in Evaluation: Requirement Profiles for Evaluators	German Evaluation Society	2008
4. Core Competencies for Evaluators of the UN System	United Nations Evaluation Group	2008
5. Competencies for Canadian Evaluation Practice	Canadian Evaluation Society	2010
6. Evaluator Competencies	Aotearoa New Zealand Evaluation Association	2011
7. The European Evaluation Society (EES) Evaluation Capabilities Framework	EES	2011
8. Competencies for Development Evaluation Evaluators, Managers, and Commissioners	International Development Evaluation Association	2012
9. UK Evaluation Society (UKES) Evaluation Capabilities Framework	UKES	2012
10. Evaluation Department Technical Competency Framework	Department for International Development	2013
11. Evaluators' Professional Learning Competency Framework	Australasian Evaluation Society	2013
12. Evaluation Competency Framework	Republic of South Africa Department of Planning, Monitoring and Evaluation (revised from 2012)	2014
13. American Evaluation Association (AEA) Evaluator Competencies	AEA	2018

Note. Frameworks 1–12 were current at the time of this research; some have been updated since.

In addition, the American Evaluation Association (AEA) Evaluator Competencies Task Force, charged in 2015 with creating a process to develop and validate a set of evaluator competencies, conducted a detailed cross-comparison of 11 existing frameworks, including 10 of those in Table 1 (King, 2018). Six independent coders clustered/classified all specific competencies into categories by alike attributes, reached consensus on final classifications, and then named the final categories. The five that emerged aligned with, and therefore corroborated, the five previously identified. These include (AEA, 2018a):

- (1) *Professional Practice Domain*—Competencies that articulate what makes evaluators distinct as practicing professionals, particularly grounded in the Program Evaluation Standards (Yarbrough, Shulha, Hopson, & Caruthers, 2011), AEA (2018b) Guiding Principles, and AEA (2011) Statement on Cultural Competence.

- (2) *Methodology Domain*—Competencies that articulate the technical aspects of conducting systematic inquiry, including designing evaluations, collecting/analyzing data, and reporting/interpreting results.
- (3) *Context Domain*—Competencies that focus on understanding the unique contexts of evaluations and their users/stakeholders, including situational analysis of the evaluation setting, culture, values, history, traditions, and other nuances.
- (4) *Planning and Management Domain*—Competencies that focus on determining, carrying out, and monitoring work plans, time lines, resources, and so on needed to successfully complete and deliver an evaluation.
- (5) *Interpersonal Domain*—Competencies that articulate social skills for constructive relations in evaluation practice, including cultural competence, communication, facilitation, and conflict resolution skills.

SA and IC

Because program evaluation practice most often operates in complex, sociopolitical contexts (Abma & Widdershoven, 2008; Greene, 2001), methodology skills are not sufficient for effectively and meaningfully conducting studies. All existing evaluator competency frameworks and cross-comparisons underscore this reality. In fact, the ability to appropriately understand the evaluation context and skillfully interact with a variety of stakeholders—that is, an evaluator’s SA and IC—may be key to enacting methodology. For example, evaluations typically require that evaluators skillfully communicate and interact with various stakeholders—whether negotiating or framing the evaluation with clients (external) or supervisors (internal), communicating with appropriate people during data collection, presenting evaluation findings to stakeholders, or discussing implications or recommendations (King & Stevahn, 2013). Furthermore, these interpersonal interactions always take place within identifiable contexts and cultures: “evaluations are highly situational, grounded in specific times and places” (King & Stevahn, 2013, p. 71). Therefore, appropriately assessing the evaluation context (SA) and engaging stakeholders and participants constructively (IC) are important to successful practice. This research investigates these two dimensions of evaluator competence, each, respectively, aligned with the *context* and *interpersonal domains* of the AEA (2018a) Evaluator Competencies, by examining the meaning of SA and IC as perceived by successful practicing program evaluators. The following question guided this research: How and in what ways do experienced program evaluators describe aspects of SA and IC in their accounts of evaluation studies conducted?

Method

Design

This research employed a qualitative design to explore and understand how program evaluators, deemed effective in their practice, understood, and enacted SA and IC from their experience in conducting evaluations. Existing evaluator competency frameworks primarily are based on literature reviews, surveys of association members, expert panels, and evaluation standards and principles. Empirical insights from how experienced evaluation practitioners think and talk about actual studies they have conducted holds promise for further determining the applicability and value of these existing frameworks. Therefore, this study engaged participating evaluators in semistructured interviews to elicit personal narratives that revealed perspectives on what essentially contributes to effective SA and IC—that is, skills, attitudes, knowledge, and/or other assets.

Participants

Selection strategies. This study sought to include participants who were skilled experienced evaluators representing different organizational, professional, or disciplinary contexts. Purposive, snowball, and sequential interviewing strategies guided the selection process. First, a purposive strategy identified evaluators who could serve as “information-rich cases” to provide input most relevant to the topic of interest (Maxwell, 2009; Merriam, 2009; Patton, 2002). These evaluators were selected from those formally recognized as outstanding practitioners by the AEA because they received the AEA Alva and Gunnar Myrdal Evaluation Practice Award.

Second, a snowball strategy (Taylor & Bogdan, 1998) identified additional experienced program evaluators to make sure that a variety representing diverse evaluation orientations would be included, in addition to those formally recognized as outstanding by AEA. Therefore, participating AEA award recipients were asked for nominations, as were the first author’s dissertation committee and professional network. This snowball selection strategy sought to recruit skilled evaluators who represented different professional roles, areas, and types of practice (e.g., consultant, director, and professor; government, health, education, and foundations; and small- and large-scale, single- and multisite practice), viewed evaluation as their primary profession, and were conducting or recently had conducted evaluation studies.

Third, a sequential interviewing strategy (Small, 2009) emerged and guided participant selection as the study progressed. The logic and power of this strategy lies in viewing each participant as a case. Each case “yields a set of findings and a set of questions that inform the next case” (Small, 2009, p. 25). This process involves deliberately choosing each case and refining interview questions as the researcher’s understanding of the phenomenon develops and expands. Similar to theoretical sampling (Glaser & Strauss, 1967), participant selection is “directed by the emerging analysis, and the theory being developed from data [is] subsequently modified by data obtained from the next participant” (Richards & Morse, 2013, p. 76). Each participant in this study was viewed as a case, thereby influencing subsequent recruitment to produce a sample representing an array of different evaluator characteristics and contexts.

The study began by contacting seven AEA award recipients identified in collaboration with the first author’s dissertation committee; two did not respond and one was not contactable, resulting in four participants. In addition, the first author’s dissertation committee, professional network, and invited recruits gave recommendations as the study progressed, resulting in 11 additional participants. Therefore, a total of 15 interviews were conducted, 4 with AEA award recipients and 11 with recommended evaluators. Two of those interviewed provided responses that tended to be abstract and general in nature, sharing little about their own practical evaluation experience. This made coding difficult and, therefore, these two were removed from the analysis. Ultimately, 13 experienced evaluators participated in this study.

Demographic characteristics. Demographics of the participants appear in Table 2. The four men and nine women who participated had an average of 25 years of practical evaluation experience, had attained an education beyond a bachelor’s degree (nine doctorates, four master’s), and predominantly held leadership roles in the field. As evaluators, they also worked across an array of evaluation organizational contexts, including foundations, government, academia, independent consulting, and research/consulting firms; five had or currently were working across two or more of these contexts. Eight worked within a specified content area such as philanthropy, STEM (science, technology, engineering, and mathematics) education, health services, disabilities services, and professional development/training, whereas five did not specify working in one content area because the focus varied depending on the evaluation study.

Evaluation approaches. Participant approaches to evaluation appear in Table 3. Overall, the evaluators in this study primarily viewed evaluation as a service, believing that their role was to provide useful,

Table 2. Participating Evaluators.

Demographics	Tallies
Total participating evaluators	<i>n</i> = 13
Evaluation experience (average = 25 years)	
5–15 years	<i>n</i> = 4
16–25 years	<i>n</i> = 4
26–35 years	<i>n</i> = 2
36–45 years	<i>n</i> = 3
Education	
Doctoral degree	<i>n</i> = 9
Master's degree	<i>n</i> = 4
Gender	
Men	<i>n</i> = 4
Women	<i>n</i> = 9
Evaluator practitioner role context	
Leadership role in the field (i.e., director, senior associate, independent consultant, principal investigator)	<i>n</i> = 10
Academic role in the academy (i.e., professor)	<i>n</i> = 3
Primary evaluation organizational context	
Foundations	<i>n</i> = 1
Government	<i>n</i> = 1
Academia	<i>n</i> = 3
Independent consulting	<i>n</i> = 3
Research/consulting firm	<i>n</i> = 5
Primary evaluation content area	
Specifically identified (i.e., philanthropy, STEM education, health services, disabilities services, and professional development/training)	<i>n</i> = 8
Varied (e.g., content focus depends on the evaluation study)	<i>n</i> = 5
Evaluation geographic practice	
Within the United States only	<i>n</i> = 10
Within and outside the United States	<i>n</i> = 3

insightful, and relevant evaluative information to address the needs and interests of clients. Ultimately, they viewed their role as going beyond making professional judgments on merit or worth to helping programs learn and improve. Evaluators A through J (*n* = 10) discussed specific evaluation/research theories, practical processes, or commitments that guided their evaluation practice, whereas Evaluators K through M (*n* = 3) tended to focus on needs of projects in general terms. Specifically, Evaluators A–D drew from evaluation/research theories to conduct evaluations, such as utilization-focused, developmental, participatory, culturally responsive, empowerment evaluation, or community-based research. Evaluators E and F focused on practical strategic processes, such as developing logic models, conceptual frameworks, evaluation questions, and data management plans. Evaluators G–J expressed commitment to a particular form of practicing evaluation, such as through a diversity lens, for enhanced learning or decision-making, or for improved programs. Finally, Evaluators K–M spoke to project needs, drawing broadly from general principles and evaluation experiences.

Data Collection

An interview guide was developed, piloted, revised, and finalized to provide focus and consistency across all interviews, yet also allowed flexibility in framing and wording

Table 3. Participant Evaluation Approaches Grounding and Guiding Practice.

Approaches	Evaluator	Description
Focused on evaluation/ research theories	A	Participatory, utilization-focused, and developmental evaluation
	B	Utilization-focused and developmental evaluation
	C	Utilization-focused, empowerment, and culturally responsive evaluation
	D	Community-based participatory research and empowerment evaluation
Focused on practical processes	E	Developing a logic model, evaluation questions, data plan, and data management plan
	F	Reviewing research, and developing a conceptual framework and evaluation questions
Focused on commitments	G	Committed to a learning orientation as a way of promoting evaluation use for decision-making
	H	Committed to an improvement/effectiveness orientation to help programs be better
	I	Committed to evaluation through a diversity lens
	J	Committed to evaluation as a process of delineating, obtaining, and providing useful information to decision makers
Focused on needs of the project	K	Drew broadly from general principles and evaluation experiences
	L	Drew broadly from general principles and evaluation experiences
	M	Drew broadly from general principles and evaluation experiences

questions (see Table 4). It was based on the Behavioral Event Interview (BEI) technique, widely used in competency research (Spencer & Spencer, 1993). The purpose of the BEI technique “is to get behind what people say they do to find out what they *really* do. This is accomplished by asking people to describe how they actually behaved in specific incidents” (Spencer & Spencer, 1993, p. 115). The interview guide, therefore, intentionally focused on how evaluators understood and enacted IC and SA by eliciting examples from their practice. The semistructured interview process outlined in the guide asked participants about their evaluation practice related to *professional relationships and communication* to reveal thinking and actions relevant to IC and *situational learning and awareness* to reveal thinking and actions relevant to SA. The initial guide was piloted with five program evaluators in the first author’s professional network, recognized for their thoughtful and reflective evaluation practice. This resulted in reorganizing the structure of the guide for smoother flow and either revising or eliminating confusing or redundant questions. Once the study began, additional small revisions and modifications occurred as new information and viewpoints emerged (Patton, 1990).

All participating evaluators received a copy of the interview guide in advance for orientation, along with information on informed consent. Because the participants were geographically dispersed, interviews occurred via online video ($n = 1$), in-person ($n = 1$), and telephone ($n = 11$). All interviews were audio-recorded with participants’ permission and lasted 60–90 min. Each began by reading an institutional review board–approved script and obtaining verbal consent. Brief follow-up interviews were conducted and audio-recorded with 3 of the 13 evaluators for additional clarification and examples from practice, each lasting about 20 min.

Data Analysis

The first author collected and analyzed data simultaneously, which allowed for continuous and progressive focus (Maxwell, 2009; Merriam, 2009; Miles & Huberman, 1994). All interviews were transcribed verbatim, then each transcript was reviewed, words/sentences clarified, and

Table 4. Interview Guide Summary.

Background

1. Can you tell me a little bit about how many years you've been practicing evaluation and generally, the type of evaluations that you've recently been conducting?
2. Generally, how would you say you approach your evaluation work? Do you have a certain framework that you follow? What would you say informs your practice?

Interpersonal Skills

3. Tell me about an evaluation where you felt a successful trusting relationship was established with a client, program participants, or other relevant stakeholders.
 - A. Talk about what you specifically did to build/foster that relationship.
 - B. How did you know to do that? What informed that decision?
 - C. In what ways do you think the relationship you just shared contributed to the usefulness and value of the evaluation?
4. Tell me about an evaluation where developing a trusting relationship was more of a struggle/challenge.
 - A. What did you specifically try to do to build a more trusting relationship?
 - B. How did you know to do that? What informed those decisions?
 - C. How did you know to do [action] and not something else?
5. Talk about the process of communicating evaluation information/findings. Walk me through an evaluation example from your practice that demonstrates your process.
6. Tell me about an evaluation where you were able to effectively communicate difficult/unpleasant information within an evaluation you conducted.
 - A. What skills did you use to navigate this communication?
 - B. Where did you acquire these skills?

Situational Awareness and Responsiveness

7. Given an evaluation you previously talked about in this interview, elaborate on how you went about learning about the program.
 - A. How did you go about learning about the surrounding contextual environment (i.e., social, historical, political, cultural, institutional, etc.)?
 - B. What steps did you go through to ensure you were gathering a comprehensive understanding?
8. Talk about an evaluation where you had to adapt to a culturally different environment and the steps you took to learn in that and about that environment.
9. In your opinion, and reflecting on your practice, what would you say are the key ingredients in demonstrating cultural responsiveness? And, if you could, talk about this through an example (examples) of how you made these "ingredients" work for you in your practice.
10. Additional comments?

Note. The complete guide appears in Garcia (2016).

any identifying information removed. Analysis began with an initial open coding process (Bailey, 2007; Strauss & Corbin, 1998) to simplify and reduce the data into manageable segments of text.

Next, focused axial coding enabled further reduction "by identifying and combining the initial data into larger categories that subsume multiple codes" (Bailey, 2007, p. 129). Initial codes were organized into 20 categories, each assigned a description. These then were organized into five broader themes and further revised through peer debriefing (Lincoln & Guba, 1985) in which an impartial colleague examined, provided feedback, and discussed the analysis with the first author, resulting in consensus on nine themes. These nine then were used to code each transcript, aggregating the data according to each theme. This resulted in slightly revising and collapsing the nine

Table 5. Participants' Understanding of Situational Awareness (SA) and Interpersonal Competence (IC).

Foundational Factors Underlying SA and IC	
1. Consultant mind-set	<ul style="list-style-type: none"> • Open to learning • Focused on listening • Flexible and adaptable • Brings humility to serve • Builds trust with program stakeholders
2. Professional reputation	<ul style="list-style-type: none"> • Brings experiential knowledge built over time in a content area or context/discipline • Applies relevant professional content/context knowledge more immediately • Relevant experience helps establish a baseline of trust and credibility
SA Competency Factors	
3. Intentional program learning and understanding	<ul style="list-style-type: none"> • Strong focus on learning from the onset • Uses different strategies to learn • Gathers program-relevant information by asking questions and using qualitative methods (interviews, focus groups, observations, etc.) • Uses tools such as concept mapping or logic models to understand specifics of the program • Conducts site visits with the purpose of learning • Strategically demonstrates knowledge gained which helps develop trust
4. Culturally conscious self-awareness	<ul style="list-style-type: none"> • Self-awareness as a person and as an evaluator • Develops and fosters humility for learning, listening, and enacting a consultant mind-set sharpened through ongoing practical experience • Develops and demonstrates cultural consciousness, particularly of environments and/or communities different from one's own • Broadens understanding of the program's larger context
5. Understanding stakeholder experience with evaluation	<ul style="list-style-type: none"> • Establishes trust from the onset to move the evaluation forward constructively • Explores and understands clients' perspectives and expectations about evaluations, which helps build trust • Understands the organizational climate around the practice of evaluation
IC Competency Factors	
6. Purposive, ongoing, and responsive communication	<ul style="list-style-type: none"> • Plans and establishes a communication strategy and schedule at the start • Engages in ongoing communication throughout the evaluation, which helps build trust • Assesses for appropriate forms of communication based on the contextual situation; adapts and is responsive to program needs and changes
7. Thoughtful framing and sharing of evaluation information	<ul style="list-style-type: none"> • Facilitates productive and useful conversations for moving the evaluation and program forward; focuses on problem-solving • Frames difficult, unfavorable, or negative feedback/findings as "opportunities" and uses communication strategies that clients will "hear"—for example, the "sandwich" technique of positive–negative–positive, which helps build trust • Situates information within a broader context

Note. Competency factors are numbered 1 through 7 across the three clusters because they are somewhat intertwined in actual practice.

Table 6. Sample Responses for Competency Factors Underlying Both SA and IC.

Factor 1: Consultant Mind-Set	Factor 2: Professional Reputation
<p>“It’s called hearing with the third ear or seeing with the third eye. In other words, you attend not just [to] the content of what people are saying, but you’re trained to attend and process, ‘What is going on here? Is this a friendly conversation?’ And so those are process skills. In clinical psychology, a client comes in and talks about a problem. On the surface, you’re hearing, ‘This is what the problem is,’ but you’re trying to listen to something deeper than that.”</p> <p>—Evaluator L</p>	<p>“A lot of the people that I work with already know me or know of me. It’s not like I go in cold, and they’ve never heard of me. I have a reputation, and I think that that is certainly helpful. I think that I have a powerful position; people know me in the field, trust my judgment. I have a lot of information that people trust and value, so I think that makes a difference. I don’t think you have to have the background expertise in that discipline, but it certainly helps.”</p> <p>—Evaluator J</p>

Note. Each quote illustrates the competency factor and is representative across evaluators’ responses. Participants = 13 evaluators; SA = situational awareness; IC = interpersonal competence.

themes into seven. The final seven themes were listed by and compared across all participants to depict and understand the extent to which each was discussed across all interviews (see Garcia, 2016).

Results

This research resulted in seven themes, referred to as factors, that reveal participating evaluators’ perspectives on what essentially contributes to effective SA and IC in evaluation practice. These factors cluster into three main categories: (a) foundational factors underlying both SA and IC, (b) factors primarily pertaining to SA, and (c) factors primarily pertaining to IC.

Factors Underlying Both SA and IC

This category contains two factors foundational to understanding both SA and IC (see Table 5; Items 1 and 2). The first is a *consultant mind-set* in which evaluators are cognizant of the expertise they bring to their work, whether internally or externally, in a way that is productive, useful, and relevant to clients and stakeholders. Dispositional components that comprise such a mind-set include being open to learning, willing to listen, flexible, and adaptable. In other words, there is a healthy humility in continuously positioning oneself as a learner, no matter how much expertise or mastery one brings as an evaluator. The second is a *professional reputation* for experiential knowledge developed over time in a particular context or content area. A well-known reputation built over time in any given area helps establish a baseline of trust, confidence, and credibility with those for whom the evaluation is being conducted. Table 6 presents responses typical of those provided by participants to illustrate their focus on serving clients well by (a) approaching evaluations with a consultant mind-set and (b) realizing how professional reputation affects trust.

Factors Primarily Underlying SA

This category contains three factors directly pertaining to SA (see Table 5; Items 3–5). The first is *intentional program learning and understanding*, especially at the start of an evaluation. This entails gathering program-relevant information through different strategies to better understand circumstances of the setting and qualities of the program that can inform or influence an evaluation. In addition, demonstrating knowledge gained about the context and leveraging it to frame a useful and relevant study further builds trust in the evaluation conducted, which is paramount to conducting

Table 7. Sample Responses for Situational Awareness Competency Factors.

Factor 3: Intentional Program Learning and Understanding	Factor 4: Culturally Conscious Self-Awareness	Factor 5: Understanding Stakeholder Experience With Evaluation
<p>“I was in an interview, and I had done [some] research. . . . And I had found a PowerPoint presentation. I noticed that they made a point of saying something about their reputation in the community and ensuring that they get some good press coverage. And I couldn’t find anything in the press about them. I looked around, and I just couldn’t figure out what that was about, and so when I was in the interview, I asked them, ‘Did you have a negative public experience?’ . . . and I think if I hadn’t seen it and [been] able to ask them about it, that they wouldn’t have mentioned it. They were actually impressed that I found it, and it seemed to [have] somehow established more trust with me . . . they seemed to respect the fact that I had done my homework.” —Evaluator F</p>	<p>“If you have a lot of biases that you can’t overcome, then you can’t go on doing evaluation with an agency that serves people who are gay and lesbian. Or if I have any biases or stereotypes about Latinos, I’m Latina myself, but what if I think that Latinos who are immigrants are poor and lazy . . . my biases are going to influence the lens I put on that helps with the evaluation.” —Evaluator D</p>	<p>“What’s your past experience with evaluation? What’s an example of a situation that you felt that it went well? And what’s an example of a situation where you felt it didn’t go well? So for me, that allows me to kind of gauge where the person’s coming from and . . . it will give me a sense of whether that person’s going to be intimidated by my role because they may think I’m judgmental or excited, because they’ve had such great experience in the past so I think that question allows me to sort of formulate a little bit of that understanding.” —Evaluator A</p>

Note. Each quote illustrates the competency factor and is representative across evaluators’ responses. Participants = 13 evaluators.

successful studies. The second is *culturally conscious self-awareness*, as when an evaluator knows “self” deeply and purposely applies this understanding when working in environments or communities culturally different from one’s own. Here, the skilled evaluator brings humility to the process of learning cultural qualities and values that will be important to the credibility of the study. The third is *understanding stakeholder experiences with evaluation*—that is, how evaluators come to know stakeholders’ preexisting assumptions about evaluation that may be positive or negative depending on past experiences. Such assumptions likely will influence how stakeholders engage with an evaluation. Those who have had positive experiences may be more willing to trust the process, whereas prior negative experiences may create resistance. Skilled evaluators purposefully seek to understand underlying assumptions to build trust needed for positive engagement in an evaluation that will produce results viewed by stakeholders as credible and useful. Table 7 presents responses typical of those provided by participants to illustrate their focus on (a) learning about and deeply understanding the program to be evaluated, (b) being culturally conscious and self-aware of predispositions, and (c) understanding stakeholder assumptions from prior evaluation experience.

Factors Primarily Underlying IC

This category contained two factors directly pertaining to IC (see Table 5; Items 6 and 7). The first is *purposive, ongoing, and responsive communication*. This entails intentionally establishing and agreeing upon a communication strategy with clients that meaningfully informs the evaluation process. It also entails knowing that an established communication strategy requires flexibility as changes may be needed to keep the evaluation relevant and up to date. Adapting how an evaluator communicates is

Table 8. Sample Responses for Interpersonal Competence Competency Factors.

Factor 6: Purposive, Ongoing, and Responsive Communication	Factor 7: Thoughtful Framing and Sharing of Evaluation Information
<p>“We gave them updates on our progress. . . . I think it was one or two people we stayed in contact with every other week. Constant communication is always critical. It helps the client be confident that we’re on track. If there are questions that we have, they can answer them, give us updates, things that have happened outside of the specific scope of work but that could influence our work. So that helped us adapt if we needed to. By the time we got to our findings. . . . the [client] was so open and they trust, because we worked so closely with them in designing it. . . . the president invited us to facilitate two meetings with his executive staff, where they actually went through every single finding and recommendation and made an action plan for how to address them.”</p> <p>—Evaluator G</p>	<p>“I think the way to present unpleasant or difficult things are to say them in a way that it’s about opportunity, and it’s about, ‘I know that you all are committed to making these changes, and I’m happy to say that I have found some opportunities for you to improve what you’re doing, so that you can more quickly and effectively reach your goals’ . . . and I did present some things that are going well. . . . some people call it the compliment sandwich, where you say, ‘Good job. Okay, this isn’t going so well. Okay, good job.’ And so it’s about making sure that people feel like you’re, again, on their side. That you’re wanting them to be successful, and part of wanting them to be successful is helping them understand these opportunities that you’ve identified.”</p> <p>—Evaluator F</p>

Note. Each quote illustrates the competency factor and is representative across evaluators’ responses. Participants = 13 evaluators.

crucial because it demonstrates to clients and stakeholders an ongoing personal commitment to the evaluation, which helps build trusting relationships among those involved in the evaluation. The second is *thoughtful framing and sharing of evaluation information*. Skilled evaluators realize that facilitating productive and useful conversations, framing information in client–user-friendly ways, and situating information within broader contexts make evaluations more relevant and, therefore, likely more useful. These types of thoughtful and mindful interpersonal interactions also create confidence and trust in the evaluation, making use more likely. Table 8 presents responses typical of those provided by participants to illustrate their emphasis on (a) purposive, ongoing, and responsive communication and (b) thoughtful framing and sharing of evaluation information.

Unexpected Outcomes

Although the seven factors resulting from this research provide nuance for better understanding SA and IC expertise, three deeper dispositional qualities/attributes/orientations also unexpectedly emerged across all seven factors as tacit elements that had profound influence on how evaluators thought about and enacted competencies in the SA and IC domains. In fact, the three elements that repeatedly surfaced are not explicitly named in most evaluator competency frameworks. These include (a) being driven by a deep commitment to serve programs well through the work of evaluation, (b) anchoring evaluation practice in humility as a learner, and (c) focusing continuously on developing trust for a successful evaluation process. We elaborate on these three elements in the sections that follow and provide sample evaluator responses to illustrate each.

Service. Overall, the evaluators who participated in this study revealed a strong sense of commitment to serve the program being evaluated and its stakeholders by conducting a genuinely useful evaluation. This constantly guided evaluation decisions, interactions, processes, and approaches. Numerous comments illustrated this service-oriented stance, such as, “I’m here to serve,” “Our job is to get

[clients] to focus,” and “The role of evaluation is to improve, not just to make the judgment.” Overall, a deep motivation to meet the needs and interests of clients and stakeholders prevailed. It did not matter whether the evaluators were internal or external to the programs or organizations in which their evaluations were conducted. Their service-oriented mind-set was like that of consultants deeply committed to assisting clients in credible and constructive ways, which constantly seemed to frame how evaluators thought about their roles and how they leveraged their knowledge, skills, and expertise to better serve the needs and interests of programs and stakeholders. Simply put, they cared about conducting evaluations that contributed to learning about and improving the program being evaluated, which influenced their actions in the SA and IC domains. Evaluators were driven to determine how best to make truly useful evaluation happen, revealed by their intentional focus on understanding the culture/context of the program, their own position in that culture/context, and their interpersonal skills/interactions leveraged to serve the program and its stakeholders through effective evaluation. Although we believe that most would not consider “serving clients well” to be a well-formulated evaluator competency, this element did consistently influence how the evaluators in this study used evaluation knowledge, focused their learning about situational contexts, and enacted interpersonal skills when conducting evaluations.

Humility as a learner. Evaluators in this study also emphasized intentionally bringing humility and a learner lens to the practice of evaluation. They repeatedly spoke about approaching their work continuously as humble learners to help them meaningfully understand program complexities, internal and external contexts, cultural foundations, stakeholders, and other components and relationships important for a successful evaluation. They also demonstrated keen awareness of how sensitivity to context, culture, and other features of an environment different from one’s own can be fundamental to carrying out an evaluation that is useful and relevant. Numerous evaluator comments underscored this stance, such as “You try to listen without judgment and listen with understanding” and “[It’s] important to be in listening mode and to not come in with any sort of expectation that we were experts.” Participants also conveyed that evaluators can “perpetuate inequality or help promote equity” by how they conduct evaluations, thereby realizing the power of evaluations to affect programs “that affect people’s lives” and the solemn role of evaluators in this—like being a steward responsible for carrying out a sacred trust. Learning about the evaluation situation and developing a keen sense of awareness of its dimensions and relationships among those within it likely will provide important pathways into framing and conducting an evaluation that is insightful and useful for the betterment of the program and the well-being of its stakeholders. Bringing humility to this learning process creates the social-interpersonal grounding that enables this to happen.

Trust. Finally, evaluators in this study were keenly aware of the importance of developing trust throughout evaluation to sustain effective and constructive interactions toward producing relevant and useful information. This goes hand in hand with exercising a consultant mind-set rooted in a desire to serve. Evaluators saw trust as playing a fundamental role in enabling the evaluation to be successful and, therefore, constantly thought about how various actions would likely impact the development and maintenance of trust. Evaluators revealed that they intentionally tried to use competencies in ways that would build trust, knowing that lack of trust would hinder conducting the evaluation successfully. Numerous evaluator comments captured the importance of keeping trust front and center throughout the entire evaluation process, including these: “If people don’t trust you as an evaluator with their challenges, then you can’t really help them,” “If trust is not there, it makes the evaluation really much more difficult,” and “I think trust is a very important [necessity] in order to really be able to do an effective job.”

Discussion

Existing sets of evaluator competencies predominately focus on knowledge, skills, and dispositions deemed important for conducting high-quality evaluations. The seven factors relevant to SA and IC that emerged in this research point to what may be central to skillfully enacting lists of specific competencies pertaining to these two domains—not so much in a prescriptive manner, but rather in a more dynamic and fluent manner—expecting, anticipating, and attending to unexpected occurrences that surface along the way, largely guided by these seven core factors. These factors also hint at the complexities in applying the lists of specific competencies and how they are interrelated and intertwined both within and across domains in actual practice.

Factors Relevant to SA

Research results revealed three factors most relevant to effective SA including (a) intentionally learning about a program, (b) attending to the cultural dimensions of an evaluation, and (c) understanding stakeholder perspectives on and expectations for evaluations. While all competencies relevant to contextual/situational analysis in any evaluator competency framework may be important, these three factors suggest that some may be more fundamental or core than others to enacting SA effectively. For example, those in the AEA (2018a) Evaluator Competencies context domain that directly align with these three factors include: 3.1 responds respectfully to the uniqueness of the evaluation context; 3.2 engages a diverse range of users/stakeholders throughout the evaluation process; 3.3 describes the program, including its basic purpose, components, and its functioning in broader contexts; 3.6 facilitates shared understanding of the program and its evaluation with stakeholders; and 3.7 clarifies diverse perspectives, stakeholder interests, and cultural assumptions. These competencies may be foundational or prerequisite to carrying out the others in this domain that include attending to systems issues within the context; communicating results in timely, appropriate, effect ways; and promoting evaluation use (3.4, 3.5, and 3.8, respectively).

Factors Relevant to IC

Research results also revealed two factors most relevant to effective IC, including (a) purposefully engaging in communication at the start and throughout implementation of an evaluation and (b) mindfully framing and sharing evaluative information. Again, this suggests that specific competencies directly focused on these factors in evaluator competency frameworks may be most crucial to effectively enacting IC. Those in the AEA (2018a) Evaluator Competencies interpersonal domain that directly align include: 5.2 listens to understand and engage different perspectives, 5.6 communicates in meaningful ways that enhance the effectiveness of the evaluation, and 5.7 facilitates constructive and culturally responsive interaction throughout the evaluation. Skillfully carrying out these interpersonal competencies may be fundamental to the others in this domain that include fostering positive relationships, facilitating shared decision-making, building trust, attending to the ways power and privilege affective evaluation, and managing conflicts constructively (5.1, 5.3, 5.4, 5.5, and 5.8, respectively).

Factors Relevant to SA and IC

Finally, research results revealed two factors relevant to both SA and IC, including (a) approaching evaluations with a consultant mind-set rooted in a deep desire to serve and (b) realizing how one's professional reputation affects relationships and interactions that support effective evaluation practice, especially in responding fluently to content/context, establishing trusting and trustworthy relationships, and cultivating credibility. This suggests that evaluators who are most effective will act like consultants who seek to serve and who recognize how professional reputation opens

opportunities to more meaningfully understand situational contexts and foster interpersonal interactions needed for successful evaluation processes.

Dispositional Elements

The three unexpected dispositional elements that emerged in this study—service, humility as a learner, and trust—perhaps point to what matters most in grounding longer lists of competencies that detail expert practice. Specifically, a commitment to serve acted as a compass for evaluators in this study because it informed how they viewed their role, which in turn guided their interactions, decisions, and use of skills and knowledge. Next, bringing humility to the learning process consistently grounded how evaluators in this study approached their evaluation contexts. This humble-learner orientation prompted evaluators to apply competencies in ways likely to expand their understanding of the program, its context, and its unique cultural characteristics, thereby further enabling them to serve in authentic, useful, and relevant ways. Finally, dedication to fostering trust by providing a trustworthy evaluation process consciously directed the actions and interactions of the evaluators in this study who realized the centrality of this for learning about and authentically serving the needs and interests of the program and its stakeholders.

Strengths and Limitations

This research has several strengths. First, it further examines two research-informed evaluator competency domains, namely, situational/contextual awareness and IC. Second, the qualitative design enabled experienced practicing evaluators to provide insights into how they think about SA and IC, which revealed nuance. Third, purposeful sampling recruited skilled evaluators who represented diversity across an array of characteristics, including gender, education, professional role, evaluation experience, organizational context, evaluation content, and geographic location of evaluation practice. Fourth, the interview guide was carefully developed, vetted, piloted, refined, and applied to elicit information about actual evaluation practice. Fifth, member checking occurred throughout each interview by the interviewer providing a brief recap statement at the end of each answered question, then inviting the interviewee to confirm, correct, revise, or elaborate. Sixth, detailed coding protocols systematically were employed. Seventh, interviews were conducted in a nonjudgmental manner to convey respect and appreciation (Patton, 1990), creating a safe space for evaluators to respond honestly. Finally, the exploratory nature of the research process and outcomes illuminate core factors and dispositional elements that ground essential evaluator competencies.

This research also has some limitations. First, the sample size was relatively small; yet, for research that produces thick description, the 13 transcripts provided in-depth, detailed narrative rarely obtained in evaluator competency research. Second, information about race/ethnicity intentionally was not documented to maintain the privacy of participating evaluators; yet, participants did represent heterogeneity across other evaluator characteristics deemed important for broad representation. Third, 8 of the 13 evaluators in this study (approximately 61%) worked in organizational contexts classified as *independent consulting* or *research/consulting firm* (see Table 2), possibly influencing responses that revealed the importance of a consultant mind-set, despite participant differences across other characteristics. Finally, interviews produced self-report responses; however, enacting an appreciative inquiry (Preskill & Catsambas, 2006) orientation likely increased a sense of safety for truth-telling, thereby decreasing the possibility of social-desirability responding.

Conclusion

Rowe (2014) suggests that we “learn from practice what a competent evaluator looks like and, importantly, how we can recognize and develop attitudes and dispositions essential to being a good

contributor to evaluation” (p. 123). This research provides new evidence on how skilled practicing evaluators comprehend and apply competencies in two major evaluator competency domains, namely, SA and IC. Although lists of evaluator competencies typically derived from literature reviews, evaluation standards, expert panels, and practitioner feedback help deconstruct what expert practice entails in these domains, the results of this study suggest that skilled evaluators may heavily rely on smaller sets of core factors and dispositional elements that profoundly influence how they think and act to produce useful evaluations.

This study also highlights how skilled evaluators develop expertise over time through learning that occurs from repeated evaluation practice, reflection, and refinement in real-world contexts. Such learning likely leads to greater clarity about what fundamentally matters in applying competencies in any given context. As Ghere, King, Stevahn, and Minnema (2006) note,

Competencies are identified by deconstructing and decontextualizing what experts in a field do. To be meaningful, the learning process must take the opposite tack and facilitate the reconstruction of the competencies into a meaningful whole by reconnecting how they apply in various contexts. By doing this, competencies shift from being a list of separate items to a resource that has direct relevance in everyday practice. (p. 111)

The reconstruction of distinct competencies into meaningful practice might begin by using the interview protocol in this research to engage evaluators in thoughtful reflection and discussion on what the competencies mean. Guided by the BEI technique that aims to “get behind what people say they do to find out what they *really* do” (Spencer & Spencer, 1993, p. 115), the interview prompts can be used for self-reflection or discussion within communities of practice to promote mindfulness of how and for what purpose evaluators apply certain competencies. Such thoughtful contemplation could contribute to shifts in how evaluators meaningfully understand and determine how best to employ competencies for effective practice.

Regardless, there is still much to learn about evaluator competencies and their usefulness for advancing expertise. Future research might replicate the interview protocol used in this study to examine other competency domains, such as the professional practice, methodology, or planning and management domains in the AEA (2018a) Evaluator Competencies. Similarly, narratives from skilled evaluators who practice in one particular context, rather than across a variety as was the case in this study, might reveal factors or elements especially germane to those contexts. Ultimately, core factors and dispositional elements that repeatedly surface would signal their importance in evaluation education and professional development designed to foster competent evaluators.

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