



global
evaluation
initiative

GEI Evaluation Competency Framework

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1.

Introduction



Introduction

Evaluation competencies

Competencies refer to the knowledge, skills and attitudes/dispositions needed by different roles involved in evaluation to effectively perform evaluation related tasks. Competencies are behavioural, they are demonstrable and measurable.

Objective of developing competency framework

GEI contributes to a common understanding of a set of competencies relevant for different roles involved in evaluation.

Scope of this competency framework

This framework is intentionally designed with high level, widely applicable categories that are relevant to a diverse range of evaluation types (e.g., independent vs. embedded, summative vs. formative, etc.). The scope includes competency domains and areas. Individual competencies are tailored in the needs of specific organizations and contexts.



Competencies for various roles in evaluation

1. **Evaluation practice occurs before, during and beyond a specific-time bound evaluation and many roles are involved.** Successful evaluation depends on all these roles and not competent evaluators alone.
2. **These roles materialize differently across institutions and evaluations.** Most people have multiple roles depending on organizational context, the nature and size of the evaluation and evaluation function. The roles may overlap, and they can occur in different combinations.
3. **While people have multiple roles, they have primary roles.** In this framework, relevant competency areas are identified according to those primary roles.
4. **This competency framework is a menu, not a check-list.** Competency areas are relevant to some, and not all, evaluation roles and an individual is not expected to possess all the competencies across the competency areas.
5. **This framework is applicable to and could be adapted for different settings** (e.g., across sectors and geographic contexts).
6. **Competencies within and across competency areas are applied in an integrated manner.**



Evaluation roles

These are the roles (archetypes) defined by function and principal tasks:

Evaluators: those who are involved in conducting/designing evaluations.

Evaluation team leaders: those who lead individual evaluations.

Managers: those who oversee and coordinate evaluations.

Commissioners: those who determine what gets evaluated and how evaluation resources are allocated.

Experts: those with specialized knowledge of interventions, sectors or contexts.

Users: those who use evaluations.



Overlap between roles

In practice, depending on the type of evaluation (independent, embedded, external) and the way the evaluation function is organized, roles may overlap. Roles can be internal (in the evaluation function) or external (contracted by the organization):

- Sometimes the user is also **the commissioner**.
- Sometimes the commissioner is also **the head of the evaluation function** (especially independent evaluation functions).
- Sometimes the head of the evaluation function is also **the evaluation team leader**.
- Sometimes the evaluation team leader is also **the evaluator** (e.g., heavily involved in the data collection and analysis); in smaller evaluations, evaluators and team leaders are the same persons.
- Sometimes the evaluator is also **the expert in a particular domain**.



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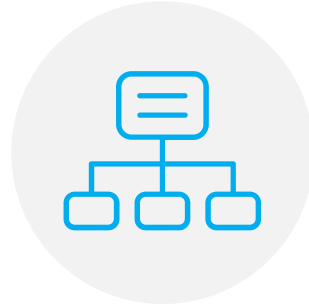
Applications

Applications of the competency framework



Education and training

Evaluation education and training providers can identify competency areas to cover in curriculum prepared for the specific roles they target.



Organizational capacity building

Organizations can map existing capacity and gaps for different internal roles involved in or contributing evaluation, to inform capacity building strategies and plans.



Professional development

By identifying competency areas relevant for their roles in evaluation, people can pursue appropriate professional development to build up needed knowledge and skills.



Hiring and contracting

Organizations can identify needed competency areas when developing or updating job descriptions for specific roles.



A. Education and training

A.1 Curriculum design and development: Design instructional content to meet specific learning outcomes that align with industry needs and expectations, emphasizing real-world skills

A.2 Assessment: Structure assessment of student/participant learning around demonstrated mastery of targeted competencies (e.g., vs. retention of specific facts)

A.3 Curation of instructional content: Tag competencies to modular pieces of instructional content to enable efficient tailoring of courses, workshops, etc. for new audiences

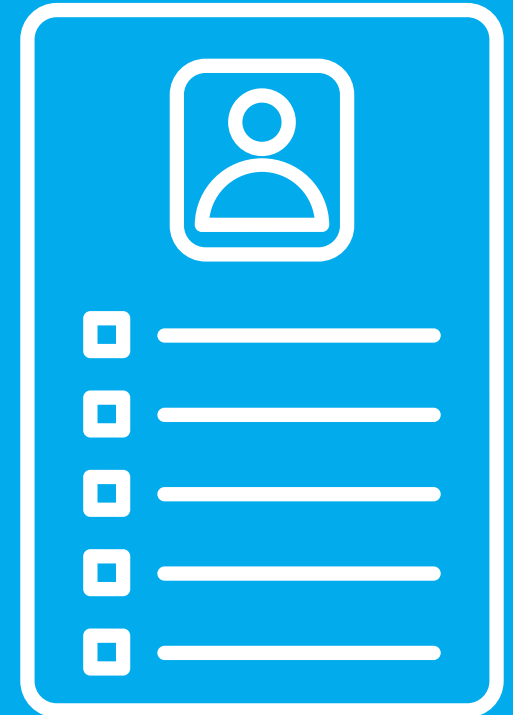


B. Professional development

B.1 Structured skill-building: Identify and develop priority competency areas for professional growth

B.2 Career mapping and progression: Plan professional development activities around competency expectations for specific evaluation roles

B.3 Performance management: Integrate competencies into performance review processes for employees and consultants involved in evaluations

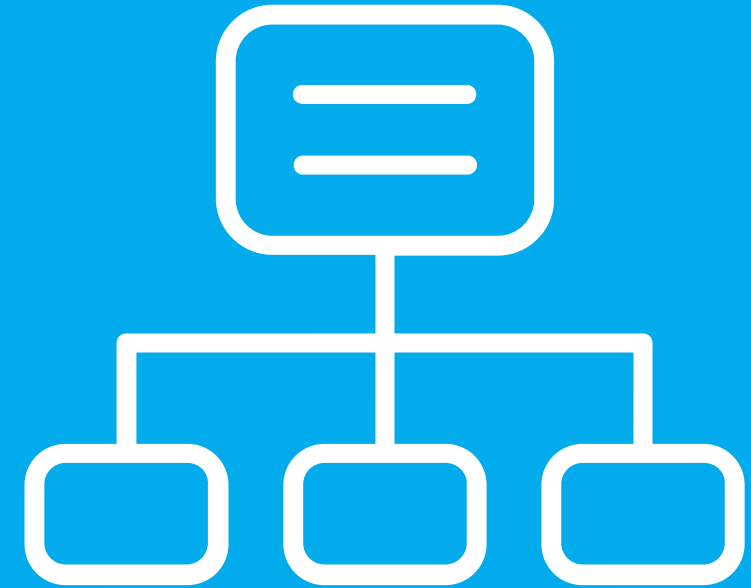


C. Organizational capacity building

C.1 Establishing organizational standards and expectations: Define evaluation competency expectations for specific units and roles within the organization

C.2 Mapping existing organizational competencies and gaps: Systematically assess current evaluation-related competencies against expectations to inform capacity strengthening plans and progress monitoring over time

C.3 Integration with relevant organizational policies and processes: Identify and reference specific competency requirements for organization-wide or unit-specific training needs assessments, succession planning, leadership development, etc.



D. Hiring and contracting

D.1 Role definition and job description development: Define and describe a job or role based on the specific competencies required for successful fulfillment of the role

D.2 Candidate assessment and selection: Develop criteria and tools/templates for screening, interviewing and scoring candidates that draw on role-specific competencies

D.3 Culture and values alignment: Increase chances of finding a good cultural fit by explicitly considering competencies with embedded values (e.g., related to respecting others' perspectives and beliefs; adapting approaches to the context) in the recruitment/hiring process



3.

Framework



How the framework is structured

Competency domains

Five broad distinguishable yet related categories of competency that make up the descriptive framework of evaluation competencies needed by various evaluation roles.

Competency areas

Three to five sub-categories of competencies (skills, knowledge and attitudes or dispositions) under each competency domain needed by various roles for effective evaluation practice.

Competencies*

Specific and detailed skills, knowledge and attitudes or behaviors under each competency area. This includes general competencies applicable to all as well as specialized competencies (e.g., AI) that may apply only to those working in that area of specialization.

*Individual competencies are recommended to be tailored to the needs of specific organizations and contexts



Five competency domains



Professional: competencies related to evaluation's role(s) in society, promotion of evaluation for better policy and practice, upholding ethical standards and advancing the profession.



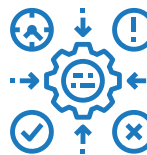
Technical: competencies related to research skills and topical expertise required to undertake systematic inquiry to address a broad range of evaluative evidence needs.



Managerial: competencies related to scoping, planning, implementing and completing an evaluation.



Interpersonal: competencies related to human relationships and social interactions with team members and stakeholders.



Contextual: competencies related to understanding and adapting to the unique settings, circumstances and diverse stakeholder perspectives in each evaluation.

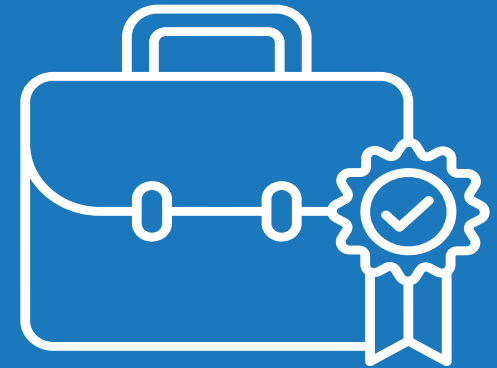


1. Professional

Competencies related to evaluation's role(s) in society, promotion of evaluation for better policy and practice, upholding ethical standards and advancing the profession.

Competency areas

- 1.1 Understands and advocates for evaluation's role, purpose and functions in society and within organizations
- 1.2 Adopts a user orientation, framing each evaluation around well-defined users, use cases, and specific evidence needs
- 1.3 Upholds ethical standards in all evaluation activities
- 1.4 Defines, communicates, and adheres to the boundaries of their professional role based on the purpose and type of evaluation
- 1.5 Pursues professional development through continuous learning and shares knowledge to build the field

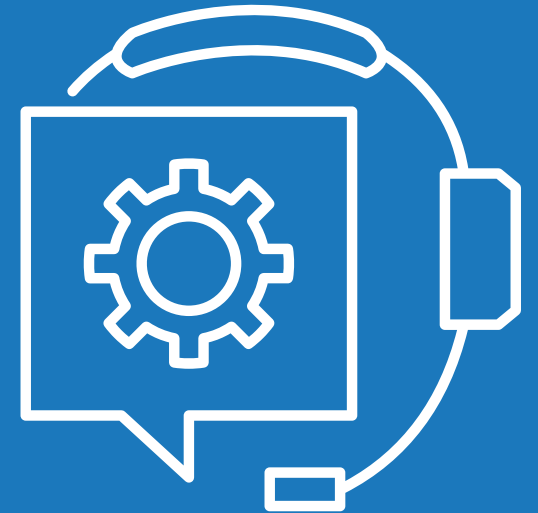


2. Technical

Competencies related to research skills and topical expertise required to undertake systematic inquiry to address a broad range of evaluative evidence needs.

Competency areas

- 2.1 Considers evaluability, feasibility, and opportunity cost before undertaking any evaluation
- 2.2 Understands and applies appropriate evaluation methodologies based on the nature of the questions, intervention, and context
- 2.3 Leverages subject matter expertise, either own or of others, to develop nuanced understanding of the intervention, relevant sector(s) and development issue(s)
- 2.4 Uses appropriate data sources and valid, reliable data collection and analysis methods to respond to the evaluation question(s)
- 2.5 Interprets data accurately, draws valid conclusions, and clearly conveys limitations vis-à-vis the evaluation question(s) and objective(s)



3. Managerial

Competencies related to scoping, planning, implementing and completing an evaluation.

Competency areas

- 3.1 Plans evaluations considering and balancing scope, resources, time and data
- 3.2 Builds a team with the right skills and experience
- 3.3 Manages evaluation implementation effectively, ensuring timely and high-quality outputs
- 3.4 Ensure responsible, transparent research practices in data collection, management and sharing
- 3.5 Engages, coordinates and communicates with stakeholders throughout the evaluation process, from the outset through knowledge translation

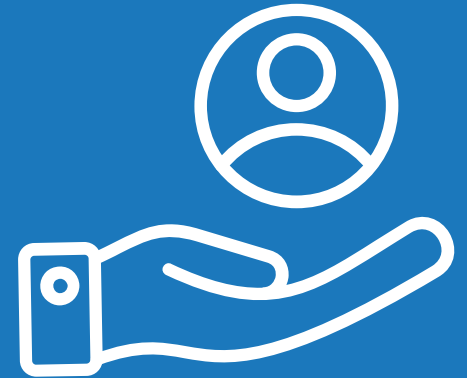


4. Interpersonal

Competencies related to human relationships and social interactions with team members and stakeholders.

Competency areas

- 4.1 Collaborates effectively and shares information freely and proactively with team members
- 4.2 Listens actively and communicates clearly and respectfully
- 4.3 Maintains intellectual openness, flexibility and humility
- 4.4 Resolves conflicts in a constructive manner
- 4.1 Collaborates effectively and shares information freely and proactively with team members

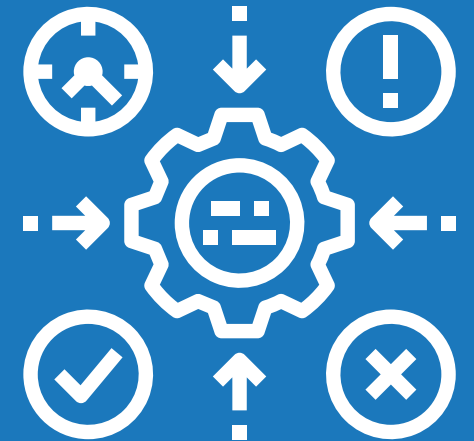


5. Contextual

Competencies related to understanding and adapting to the unique settings, circumstances and diverse stakeholder perspectives in each evaluation.

Competency areas

- 5.1 Learns and respects the values, perspectives and beliefs of different individuals, groups, and cultures
- 5.2 Understands the institutional context as pertinent to the evaluation, including norms, policies, processes and systems
- 5.3 Adapts evaluation approach, methods, outputs, engagement style and communication to suit the specific context and stakeholders
- 5.1 Learns and respects the values, perspectives and beliefs of different individuals, groups, and cultures
- 5.2 Understands the institutional context as pertinent to the evaluation, including norms, policies, processes and systems



Relevance of competency areas by role

Role	Competency Areas																					
	1.1	1.2	1.3	1.4	1.5	2.1	2.2	2.3	2.4	2.5	3.1	3.2	3.3	3.4	3.5	4.1	4.2	4.3	4.4	5.1	5.2	5.3
Team Leader	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Evaluator	Blue	Blue	Blue	Blue	Blue	Green	Blue	Blue	Blue	Blue	Green	Green	Green	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue	Blue
Manager	Blue	Blue	Green	Green	Green	Blue	Green	Green	Green	Green	Blue	Blue	Blue	Green	Green	Blue	Blue	Blue	Blue	Blue	Green	Green
Commissioner	Blue	Blue	White	White	White	Blue	White	White	White	White	Green	White	White	White	Blue	Blue	Blue	Blue	Green	Green	Green	Green
Expert	Blue	Blue	Blue	Blue	White	White	White	Blue	Blue	Blue	White	White	White	White	White	Blue	Blue	Blue	Blue	Blue	Blue	Green
User	White	White	White	White	White	White	White	White	White	White	White	White	White	White	White	Blue	Blue	Blue	Green	Blue	Blue	Green



Primary competency area:
 this competency area is key or central to this role. It is one of the principal things this role should know or be able to do for them to effectively execute evaluation activities.



Secondary competency area:
 this competency area is less important for this role to effectively undertake evaluation activities and tasks. It may be advantageous for them to know or have the skills, but they do not need to have the competencies in this competency area.



The following competency frameworks were reviewed:

[American Evaluation Association \(AEA\) Evaluator Competencies \(2018\)](#)

[Asia Pacific Evaluation Association \(APEA\) Competency Framework for Evaluators \(2021\)](#)
Which was based on a review of resources from [AJoE](#), [ANAZEA](#), [EES](#), [IDEAS](#), [UKES](#), [UNEG](#), and [CES](#)

[Canadian Evaluation Society \(CES\) Competencies for Canadian Evaluation Practice \(2018\)](#)

[Department of Performance Monitoring and Evaluation of the Presidency of the Republic of South Africa \(DPME\) Evaluation Competency Framework for Government \(2014\)](#)

[International Development Evaluation Society \(IDEAS\) Competencies for Development Evaluation Evaluators, Managers and Commissioners \(2011\)](#)

[South Africa Monitoring and Evaluation Association \(SAMEA\) Evaluator Competencies Framework \(2020\)](#)

[United Nations Evaluation Group \(UNEG\) Evaluation Competency Framework \(2016\)](#)



Mapping evaluation competency frameworks

#	GEI	AEA	APEA	CES	SAMEA	UNEG	IDEAS	DPME
1	Professional	Professional practice	Professional practice	Reflective practice	Professional practice	Professional Foundations	Professional Foundations	Overarching considerations
2	Technical	Methodology	Technical competence	Technical practice	Technical practice	Technical Evaluation Skills	Evaluation Planning and Design + Conducting the Evaluation	Evaluation craft
3	Managerial	Planning & Management	Program management	Management practice	Managing an evaluation	Management Skills	Managing the Evaluation	Implementation of evaluation
4	Interpersonal	Interpersonal	Interpersonal competence	Interpersonal practice	Interpersonal	Interpersonal Skills	(Area within 'Managing the Evaluation')	(Area within 'Overarching considerations')
5	Contextual	Context	Contextual analysis	Situational practice	Context	(Area within 'Technical Evaluation Skills')	(Area within 'Professional Foundations')	(Area within 'Overarching considerations')
6	(in multiple domains)	(in multiple domains)	(in multiple domains)	(in multiple domains)	(in multiple domains)	(in multiple domains)	(in multiple domains)	Leadership
7	(Area within 'Professional')	(Area within 'Professional practice')	Personal and professional development	(Area within 'Reflective practice')	(Area within 'Professional Practice')	(Area within 'Professional Foundations')	(Area within 'Professional Foundations')	(Area within 'Evaluation craft')
8	(Area within 'Contextual')	(not addressed)	(not addressed)	(not addressed)	(Area within 'Technical practice')	(Area within 'Promoting a Culture of Learning for Evaluation')	Monitoring Systems	(implied area within 'Overarching considerations')
9	(addressed in 'Managerial' and 'Contextual')	(in multiple domains)	(Area within 'Interpersonal competence', 'Contextual analysis')	(in multiple domains)	(Area within 'Interpersonal')	(Area within 'Technical Evaluation Skills')	Communicating Evaluation Findings	(Area within 'Implementation of an evaluation')
10	(Areas within 'Professional')	(in multiple domains)	(Area within 'Contextual analysis')	(partially addressed in 'Reflective practice')	(partially addressed in 'Professional Practice')	Promoting a Culture of Learning for Evaluation	Promoting a Culture of Learning from Evaluation	(Area within 'Implementation of an evaluation')

Explanatory note: Domains are listed in **bold** in the column below the name of each organization whose framework was reviewed. Domains that are comparable between frameworks are positioned in the same row, even if they have a different name. Domains **highlighted in green** represent those that were most consistently present across all evaluation competency frameworks reviewed. Text in parentheses and *italics* describes where/how the domain associated with a given row was represented in a given organization's competency framework (as noted by the column headings).





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