Reflections of an Emerging Evaluator
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Introduction: an emerging evaluator’s journey

- Post-Grad qualification M&E & programme implementation experience
- Small-scale evaluation of Luthando OVCC HBC programme
- Joining an academic institution and M&E organisation and practicing M&E
From theory to practice

M&E Course
- Training in theory & methodology

Luthando Evaluation
- Small scale evaluation
- HBC – simple programme
- Initial application of competencies

Current Evaluation
- Complex evaluation
- Multi-site
- Multi-agency
- More roles to play
- Higher demand on competencies
Step 1: Masters in Monitoring and evaluation

M&E course work laid the theoretical foundation, training in methodology & data analysis skills e.g. analysis software

- Understanding evaluation types & approaches
- Understanding evaluation designs
- Understanding methodology
- SPSS and ATLAS.ti
Step 2: Small scale academic evaluation

Evaluation of Luthando OVCC HBC programme was my first contact with the world of evaluation

♦ Uncertain about what I was doing
♦ I was unsupervised
♦ Large expectations from organisation from an academic exercise
Step 3: Involvement in complex evaluation

- Being appointed in an M&E Organisation and University Department that teaches M&E

The course work and Evaluation report prepared me to some extent for what I was to encounter in the real world but I am finding that there are some things one cannot be taught in the classroom that are essential to an evaluator.
Evaluation Activities, Evaluator Roles, Competencies

- Evaluator Competencies (DPME 2014)
- Evaluator Roles (Skollits et al 2012)
- Evaluation Activities (Skollits et al 2012)
Evaluation Activities

1. Preparation to serve as evaluator (management) – includes putting together team, getting resources and budgeting
2. Initiating Contact – understanding the evaluand
3. Planning Evaluation– coming up with detailed evaluation plan
4. Evaluation Contracting – negotiating with client on deliverables & time tables
5. Implementation – beginning of implementation including stakeholder engagement
6. Collecting/ Analysing Data – collection & analysis of data
7. Making Judgment – making a judgment, recommendations
8. Reporting – sharing results with client and stakeholders
9. Using Results – advocating for evaluation findings and recommendations
10. Reflecting – reflect on experience to improve knowledge & practice

Evaluator Roles

1. Detective (clarificator) – gathers information about the programme and evaluability of programme
2. Designer – puts together the evaluation plan
3. Negotiator – negotiates to reach agreement with client
4. Diplomat (mediator) – engages with different stakeholders of the programme
5. Researcher – collects and analyses data using appropriate methods
6. Judge – makes decision about programme based on evidence
7. Reporter – shares results with various stakeholders
8. Advocate – promotes use of evaluation findings
9. Learner – reflects on experience & learns from that
10. Manager – manages various aspects of the evaluation e.g. personnel, resources, relationships. Like the diplomat this role can be played throughout the evaluation

Evaluator competencies

As categorised by the DPME (2014), evaluator competencies fall within 4 competency dimensions:

◆ Overarching considerations – including contextual knowledge & interpersonal skills
◆ Leadership – skills of evaluation leaders e.g. managers
◆ Evaluation craft – includes evaluative discipline and research practice
◆ Implementation of evaluation – covers planning & management as well as reporting & improvement

## Self-assessment framework

<table>
<thead>
<tr>
<th>Activity</th>
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<td>5. Making Judgment</td>
<td>Judge</td>
<td>Evaluative Discipline &amp; Practice + contextual knowledge &amp; understanding</td>
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<td>6. Reporting</td>
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<td>9. Reflecting</td>
<td>Learner</td>
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<td>10. Management</td>
<td>Manager</td>
<td>Managing Evaluation</td>
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**Key:**
- N = Novice
- C = Competent
- E = Expert
### Initial contact and design

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**Rationale for assessment:**
- Past work experience contributed to interpersonal skills
- Competency in resource management & planning from past work
Initial initiation and data collection

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Rationale for Assessment:
- Interpersonal skills were from previous work experience e.g. communication, negotiation, facilitation.
- Some competency in qualitative data analysis taught in M&E course. I did not have competency in quantitative data analysis & I am learning these in current evaluation.
### Being Evaluative - Judgment continued

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**Rationale for assessment:**
- Moderate sector specific knowledge based on past work experience but current evaluation, I had very little knowledge – learning as I go
- I had some cultural competency e.g. language, the culture of the community and this was meager with current evaluation that has multi-sites
- Recommendations based on literature mostly & not past experience with other similar projects or programs
### Reporting & Use of Results Continued

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**Rationale for Assessment:**

- Reporter competency from the course & past work experience
- Advocate for use I had some competency from the course & incorporated that in the clarificatory evaluation
## Rationale for Assessment:

- I had some knowledge from the course but the art of stepping away from the data and finding interesting patterns and emerging themes I have found comes with practice.
- I had competency from previous work experience but I had a naïve assumption that I would not be affected by project management issues – yet I find management is required through-out.
Now that I am part of more complex evaluations...

- Awareness of how the organisational context of the evaluand affects my work as an evaluator.
- Awareness of self as part of the context.
- Playing the advocate role where the perception of evaluators as inspectors are still prevailing among stakeholders—requiring negotiating and diplomacy throughout evaluation.
- As I moved to bigger evaluation, there is more data (more cleaning (which is affected by the data capturer as well and his or her context) & higher demand on competency.
- The importance of on-going self-reflection.
**Conclusion**

“Evaluation involves ongoing learning. The practice of evaluation builds on science and theory, but is ultimately a craft that is shaped by experience and expertise, and conditioned by the specific context of an evaluation.” (Rog 2015: 235)

- The emerging evaluator has to be open to constant learning and unlearning – from literature, from peers and from experts and from experience
- The emerging evaluator comes with some competency and some of that competency proves useful to evaluation assignments
- It is a big step from the course evaluation report to a bigger evaluation but the preparation in the course and the course evaluation report cannot be discounted
- We ‘practice’ evaluation – evaluation is a practice
The emerging evaluator needs a mentor

Just as Jennifer Greene reflected on her journey of learning as a novice from Guba, emerging evaluators are likely to do better with the mentorship of an expert.