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Abstract: This article presents a comprehensive taxonomy of essential competencies for program evaluators. First, the authors provide a rationale for developing evaluator competencies, along with a brief history of the initial development and validation of the taxonomy of essential evaluator competencies in King, Stevahn, Ghere, and Minnema (2001). Second, they present a revised version of that taxonomy and describe the revision process. Third, a crosswalk accompanying the taxonomy indicates which competencies address standards, principles, and skills endorsed by major evaluation associations in North America. Finally, the authors identify future needs related to the taxonomy, including the need for validation research, a shared understanding of terms, and the construction of descriptive rubrics for assessing competence.

Keywords: *evaluator competencies; evaluation training; professional issues; standards*

Program evaluation began as a field with a can-do attitude. Faced with unprecedented opportunities during the era of well-funded Great Society programs, evaluators in the 1960s and 1970s applied the techniques of large-scale social research to study program effectiveness. Evaluation theorists defined terms and labeled concepts to describe an evolving practice, such as formative versus summative evaluation (Scriven, 1967), responsive evaluation (Stake, 1980), and utilization-focused evaluation (Patton, 1978). Evaluation models multiplied as people worked in different settings with different needs (see, e.g., Alkin, 1969; Provus, 1969; Stufflebeam, 1973). Those who focused on design developed methods to study programs in situations not conducive to traditional quantitative research, including the quasi-experiment (Campbell & Stanley, 1963) and naturalistic methods (Guba, 1978). Like fields that have grown

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in response to legal mandates (e.g., special education), program evaluation emerged largely from its practice.

Through the years, the can-do attitude, coupled with hard work, led to increasing professionalization of the field. Professional organizations—the Evaluation Research Society and the Evaluation Network, which merged in 1985 to form the American Evaluation Association—developed, as did journals and textbooks devoted to program evaluation. Led by Daniel Stufflebeam, the Joint Committee on Standards for Educational Evaluation (1994), representing 16 professional organizations, engaged in a multi-year process to develop and publish formal standards that articulate key attributes for improved program evaluation: utility, feasibility, propriety, and accuracy. A task force of the American Evaluation Association (1995) later created the *Guiding Principles for Evaluators*, providing guidelines for evaluation practice and further developing the field as a profession. *New Directions for Program Evaluation* published a list of evaluation training programs (Altschuld, Engle, Cullen, Kim, & Macce, 1994), and Fitzpatrick, Sanders, and Worthen (2004) highlighted the features of program evaluation that suggest steady growth toward professional status.

In one area, however—the development of competencies for evaluators—the field of program evaluation has been decidedly less than can-do. Most fields recognized as professions have typically developed competencies for practice (e.g., in health care, teaching, counseling, and so on) by asking a group of distinguished practitioners—often on behalf of a professional organization—to first generate a category scheme and initial list of competencies, then to institute an expert review process to edit and refine them. The competencies are then made available to professionals in the field to structure the following: training programs for novice practitioners; continuing education programs for experienced professionals; and periodic reviews to update the competencies as theory, research, and practice evolve with time. This has yet to happen in the field of program evaluation.

Distinguished writers and practitioners in program evaluation followed a different course. They debated instead whether it was even possible to discover the common ground of competencies in an area of practice spanning such diversity across context and content. Internal versus external evaluator roles, for example, entail different types of relations between evaluator and client (e.g., short-term versus long-term associations), which in turn imply different types of opportunities and constraints (e.g., insider versus outsider perspectives). Similarly, program evaluators who work in business, government, education, health, nonprofit, or other sectors face different sets of concerns across those sectors. This has created a classic chicken-egg situation. If there are no competencies agreed upon in program evaluation, then the field cannot become a unified profession by working across its differences. At the same time, if the field is truly that diverse and cannot speak across its differences, then it will never be possible to identify competencies. The taxonomy of essential evaluator competencies proposed in King, Stevahn, Ghere, and Minnema (2001) marked one effort that provided hope that agreement on evaluator competencies might be possible. This article marks a second step in that search.

A Rationale for Developing Competencies for Program Evaluators

After 30 or so years of discussion, one may well ask, "If competencies are the solution, what exactly is the problem?" Put another way, are there consequences of *not* having established competencies for program evaluators? Several come immediately to mind. First, because there is no standardized licensing or credentialing, anyone can claim to be an evaluator. Because of

this, incompetent evaluators, charlatans, and crooks may well pass as seasoned professionals. Second, program directors who set out to hire an evaluator have no easy way of knowing who is qualified to do the job, and the reminder of "caveat emptor" may provide little comfort. Third, individuals interested in becoming evaluators may struggle to determine what they need to learn or where they should study. Fourth, those who provide professional development or university programs may base their curricula only on perceived needs or personal preferences. Fifth, a broader concern is the continuing lament that the field lacks program evaluation research aimed at developing and validating theory-based descriptive models to guide effective practice. Instead, the field primarily has produced prescriptive models for practice derived from practical needs in particular contexts (Alkin, 2004). All of these issues relate directly to the field's lack of competencies, creating a problem-oriented rationale for developing them.

Building in part on these negatives, we believe that an affirmative rationale for evaluator competencies exists as well. To our way of thinking, the field would benefit from evaluator competencies in four primary ways: (a) improved training, (b) enhanced reflective practice, (c) the advancement of research on evaluation, and (d) the potential for continued professionalization of the field.

Improved Training

There are several ways in which evaluator competencies can facilitate the improvement of evaluation training. In university settings with formal preparation programs that award academic degrees or training certificates, evaluator competencies may serve as an anchor for structuring program foundations and determining required courses. By systematically embedding such competencies in or across all courses, faculty collectively and individually can create a cohesive program that equips students with the knowledge, skills, and dispositions they will need for successful professional practice. The competencies also can guide effective instruction and assessment in each required course. Although faculty can currently base program and curriculum decisions on *The Program Evaluation Standards* (Joint Committee on Standards for Educational Evaluation, 1994), those standards speak to what constitute effective evalua*tions*, rather than what constitutes competent evalua*tors* who conduct such evaluations.

Without explicit identification, crucial competencies may be either assumed or overlooked, potentially leaving trainees without a full complement of skills. For example, few university programs provide formal training in the interpersonal skills required for many evaluation approaches, particularly participant-oriented approaches. A comprehensive taxonomy of evaluator competencies would highlight the need for such training as well as focus faculty and students alike on targeting interpersonal skills for practice in internships. Competence in the development of such skills also could be included in candidacy criteria or exit interviews, along with the technical inquiry competencies—such as quantitative and qualitative methods—which typically form the foundation of university evaluation studies programs.

In nonuniversity evaluation training settings, evaluator competencies also can guide decision making regarding the types of professional development experiences needed and the sequencing of such experiences. Whether organizations provide ongoing evaluation training for employees or promote professional development for specific purposes—such as evaluation capacity building for self-study or continuous improvement—a taxonomy of essential evaluator competencies can be useful for examining the knowledge, skills, and dispositions participants already possess and which areas for growth would most likely advance both personal development and organizational aims.

Enhanced Reflective Practice

One hallmark of professional effectiveness is continuous learning and skill refinement. A taxonomy of competencies for systematically reflecting on practice can facilitate this process. Whether working in a context that supports professional development by promoting participation in ongoing training experiences—such as within an organization that sponsors ongoing training—or working in a situation where professional development must be sought at one's own initiative—such as when evaluators operate as independent consultants—evaluator competencies can anchor reflective practice by providing substance for self-assessment. Similar to engaging in metacognition, evaluators benefit from the following: being acutely aware of personal evaluation preferences, strengths, and limitations; self-monitoring the results of actions intended to facilitate effective evaluation studies; and planning how to enhance future endeavors. A comprehensive taxonomy of evaluator competencies can provide meaningful substance for such reflection.

We have identified four types of evaluators who we believe would find such a taxonomy helpful for reflection and self-assessment: (a) new evaluators, that is, people entering the field of program evaluation who are not engaged in professional development but typically are facing circumstances that require additional knowledge or the development of new skills to meet the demands of their evaluation circumstances; (b) accidental evaluators, that is, people without training who have been given responsibility for conducting evaluations—sometimes with little interest in such work—and who are trying to sort out exactly what will be necessary to do the job; (c) professionals in transition, that is, people who are professionals in one area but have elected to become evaluators; and (d) experienced evaluators who want to keep up with changes in the field's theory and practice, expand expertise across evaluation approaches, or develop evaluation theory in the scholarly sense to ground pragmatic practice in the real-world sense. For all of these evaluators, a taxonomy of essential evaluator competencies becomes a useful tool for identifying areas of existing strengths (e.g., particular evaluation approaches, methods, communication skills, interpersonal skills) as well as areas of need.

Advancement of Research on Evaluation

The tasks of formulating and validating theories of effective practice, as traditionally pursued in most other social science disciplines, have not generally been a focus within the field of program evaluation (Christie, 2003; Stufflebeam, 2001). This is an area where essential evaluator competencies can play a useful role—especially as they pertain to enacting different evaluation models and approaches successfully. The competencies provide abundant possibilities for determining useful questions (or problems) of practice to investigate, identifying independent and dependent variables, formulating hypothesized relationships, and examining various aspects of effectiveness.

Possible areas for systematic research on program evaluation include (a) examining the role of competencies in effective evaluation practice, for example, framing evaluation questions, remaining open to input, or resolving conflicts constructively; (b) investigating the impact of training on skill acquisition and application, that is, identifying what types of professional development experiences facilitate skill development and transfer of training; and (c) determining variables that mediate successful evaluation practice, such as identifying conditions that facilitate or hinder use of competencies or their effectiveness, especially within particular contexts or models of practice. The competencies also can be a springboard for further work in operationally defining variables or describing skill-based evaluator activities to better understand the personal dimensions of evaluation practice in specific contexts. Pursuing these areas

of research has the potential to further advance the field of program evaluation by contributing to the development and validation of descriptive theories useful for refining, extending, and guiding effective practice.

Professionalization of the Field

We would further argue that there is an intrinsic benefit to the field to discussing the specific knowledge, skills, and dispositions that define competent evaluation practice. Even absent agreement, professional discussion on competencies sets an agenda for grappling with what is important to evaluation practice in differing areas. Furthermore, if the field wants to move toward licensure or credentialing of evaluators, the competencies provide initial topics for discussion and refinement (Altschuld, 1999). The existence of a set of competencies may also increase the potential for program accreditation if an organization like the American Evaluation Association were to adopt and adapt them for this purpose, an important step in professionalizing the field.

Taxonomy of Essential Competencies for Program Evaluators

The taxonomy of essential competencies for program evaluators presented in this article both extends and refines an earlier version proposed in King et al. (2001). That publication describes how a group of four individuals at the University of Minnesota piloted a face validity study on an initial set of evaluator competencies. The initial validation process used a Multi-Attribute Consensus Reaching (MACR) procedure with 31 participants located in or near Minneapolis-St. Paul (Minnesota). Those participants represented diverse evaluator roles, contexts, levels of training, and years of experience. The quantitative and qualitative findings indicated consensus on the perceived importance of more than three fourths of the proposed competencies. Areas where consensus did not emerge among participants tended to reflect the role- and context-specific aspects of their evaluation practice. Although the initial taxonomy remained constant throughout the entire validation study, all participants were asked what they believed should be added to (or omitted from) the list of competencies following their participation in the validation tasks. Their suggestions and underlying rationales were systematically recorded for future consideration. A complete description of the study's design and a full discussion of its findings appear in King et al. (2001).

Following publication of the initial set of evaluator competencies in King et al. (2001), the original group of four investigators continued to pursue the development of essential competencies on several fronts. One set of actions involved presenting the published set of competencies at professional conferences, including the annual meeting of the American Evaluation Association (AEA) and the yearly Minnesota Evaluation Studies Institute (MESI). Another undertaking involved creating and conducting a one-credit course in the University of Minnesota's graduate-level Evaluation Studies Program in which participants grappled with issues relevant to the published set of evaluator competencies. In addition, we consulted with Professor James Altschuld, who had led a Task Force on this topic for the American Evaluation Association.

Two primary purposes guided our endeavors. The first was to generate critical discussion and further input on the taxonomy of evaluator competencies from both professionals and students in the field. In doing so, we consistently asked if anything should be added to (or omitted from) the list and why. Our second purpose was to provide individuals who attended the sessions with an opportunity for competency-based reflection on their own evaluation practice and

professional development. Their personal insights provided further feedback on the initial taxonomy of competencies.

More than 100 individuals participated in the various presentations, meetings, or course sessions that we conducted to elicit additional input on the initial taxonomy of evaluator competencies. In doing so, we systematically recorded comments, issues, and suggestions that surfaced during the discussions. The recurring themes that emerged from critiquing those records, along with our own continued thinking on competencies and participants' keen interest and enthusiasm for further discussion, suggested the following five needs for revision: (a) the need for a user-friendly format, (b) the need to systematically cross-reference the competencies with evaluation standards endorsed by evaluation associations, (c) the need for additional competencies to comprehensively support existing evaluation association standards, (d) the need for precision within each competency, and (e) the need to disseminate the revised taxonomy in order to facilitate timely continued discussion and critique. The taxonomy of essential competencies for program evaluators presented in Table 1 resulted from intentionally addressing each of these needs.

Before elaborating in the following sections how we addressed each need listed above, we wish to note that there is no generally accepted definition for *competencies* (Rychen, 2001), nor agreement on how to write them. The term *competencies* is derived from the term *competence*, which in the world of work signifies that a person has reached some level of expertise with the multifaceted abilities needed to be successful in any given field. Different frames of reference, however, influence how competencies are conceived and operationalized (Weinert, 2001). In education, for example, some consider competencies to include specialized skills and knowledge, whereas others also include attitudes or dispositions (Blanton, 1992; Gettinger, Stoiber, Goetz, & Caspe, 1999). Despite a lack of agreement, most competency taxonomies focus on "complex action systems that encompass not only knowledge and skills, but also strategies and routines for appropriately applying these knowledge and skills, as well as appropriate emotions and attitudes and the effective self-regulation of these competencies" (Rychen, 2001, p. 8). Accordingly, we chose to use a competency framework that includes the knowledge, skills, and dispositions program evaluators need to be effective as professionals. We also chose to write the competencies in behavioral language (to the extent possible), describing "the things you can see or hear being done" (Green, 1999, p. 7). As such, the competencies predominantly describe various activities that evaluators carry out to achieve standards that constitute sound evaluations (e.g., *The Program Evaluation Standards*; Joint Committee on Standards for Educational Evaluation, 1994). It is important to note, however, that using *behavioral language* is not the same as taking a *behavioral approach* to developing competencies, the latter of which tends to task-analyze competencies into discrete behaviors rather than considering whole, functional outcomes (McAllister, 1998).

Need for a User-Friendly Format

The previously published taxonomy of evaluator competencies was organized in a three-tiered scheme (see King et al., 2001). The first tier designated four broad *domains*, the second tier identified main *categories* within each domain, and the third tier listed specific *items* under each category. This trilayered classification scheme was dictated by the MACR validation process in the original study but proved to be difficult for practical use. For example, many individuals found the domain labels to be so general that they did not immediately bring to mind the competencies contained in each (the four *domains* were I. Systematic Inquiry, II. Competent Evaluation Practice, III. General Skills for Evaluation Practice, and IV. Evaluation Professionalism). The multitiered scheme also resulted in a cumbersome numbering system that used

Table 1
Taxonomy of Essential Competencies for Program Evaluators

King, Stevahn, Ghere, & Minnema (2001)		Essential Competencies for Program Evaluators	Joint Committee Program Evaluation Standards (1994)	AEA Guiding Principles (1995)	Canadian Evaluation Society Essential Skills Series (1999)
IV	1.0	Professional Practice			
IVC	1.1	Applies professional evaluation standards	A12	D.1	None
IVD					
IVB	1.2	Acts ethically and strives for integrity and honesty in	P1	C	1.l
IVB1		conducting evaluations	P2	C.1	
			P3	C.2	
			P4	C.3	
			P5	C.4	
			P6	C.5	
			P7	C.6	
			P8	C.7	
				D.1	
IVB2	1.3	Conveys personal evaluation approaches and skills	P5	C.5	1.l
		to potential clients	A11		
IVB3	1.4	Respects clients, respondents, program participants,	P3	D	None
		and other stakeholders	P4	D.1	
				D.2	
				D.3	
				D.5	
IVB4	1.5	Considers the general and public welfare in evaluation	None	D.4	4.i
		practice		E	
				E.2	
				E.3	
				E.5	
IVE6	1.6	Contributes to the knowledge base of evaluation	None	None	None
I	2.0	Systematic Inquiry			
IB1	2.1	Understands the knowledge base of evaluation	None	A.2	1.a
IB5		(terms, concepts, theories, assumptions)		A.3	1.b
					1.c
					1.d
IA3	2.2	Knowledgeable about quantitative methods	A9	A.2	4.f
IA4				A.3	
IC3					
I4A	2.3	Knowledgeable about qualitative methods	A8	A.2	4.f
				A.3	
I4A	2.4	Knowledgeable about mixed methods	None	A.2	None
				A.3	
IC1	2.5	Conducts literature reviews	None	None	None
	2.6	Specifies program theory	None	None	2.e
					2.i
					4.a
IB3	2.7	Frames evaluation questions	U3	A.2	1.e
				E	
IB4	2.8	Develops evaluation designs	A3	A.1	1.f
			A4	A.2	2.e
			A5		4.d
			A6		
IC2	2.9	Identifies data sources	A4	None	None
IC4	2.10	Collects data	A5	A.1	3.d
			A6		4.c
			A7		
	2.11	Assesses validity of data	A5	A.1	4.e
			A7		
	2.12	Assesses reliability of data	A6	A.1	4.e
			A7		

(continued)

Table 1 (continued)

King, Stevahn, Ghere, & Minnema (2001)		Essential Competencies for Program Evaluators	Joint Committee Program Evaluation Standards (1994)	AEA Guiding Principles (1995)	Canadian Evaluation Society Essential Skills Series (1999)
IC5	2.13	Analyzes data	A7 A8 A9	A.1	1.h
IC6	2.14	Interprets data	U4	A.3	1.h A10
IB6	2.15	Makes judgments	U4 A10	None	None
IB7	2.16	Develops recommendations	None	None	None
IIIA	2.17	Provides rationales for decisions throughout the evaluation	A10 U5	A.2 A.3	None 1.h
IC7	2.18	Reports evaluation procedures and results	P6 A11	E.3	4.j
IIIA	2.19	Notes strengths and limitations of the evaluation	A12	A.2 A.3 B.2 C.1 C.6	None
IB8	2.20	Conducts meta-evaluations	A12	None	None
IIB	3.0	Situational Analysis			
	3.1	Describes the program	A1	None	2.h
	3.2	Determines program evaluability	None	None	None
	3.3	Identifies the interests of relevant stakeholders	U1	E.1 C.1	2.a
IIA	3.4	Serves the information needs of intended users	U1 U3 U7 P1	C.3	2.d 2.f 2.g
	3.5	Addresses conflicts	P7	C.4 E.4	None
	3.6	Examines the organizational context of the evaluation	A2 F2	E.2	None
IIB2	3.7	Analyzes the political considerations relevant to the evaluation	F2	C.3 E.1 E.2	None
	3.8	Attends to issues of evaluation use	U7	None	1.k 4.k
IIB1	3.9	Attends to issues of organizational change	F2	E.2	3.c 3.g 3.h
IIB3	3.10	Respects the uniqueness of the evaluation site and client	P4	D.3 D.5	None
IIB4	3.11	Remains open to input from others	None	E.1	None
IIB5	3.12	Modifies the study as needed	None	C.2	None
IIC	4.0	Project Management			
IIC1	4.1	Responds to requests for proposals	None	B.2	None
	4.2	Negotiates with clients before the evaluation begins	P2	C.1 A.2	2.a 2.d 2.f
IIC2	4.3	Writes formal agreements	P2	None	None
	4.4	Communicates with clients throughout the evaluation process	U5 U6 P6	A.3 C.1 C.2 C.5 C.6	1.i 1.j 2.d
IIC3	4.5	Budgets an evaluation	F3 P8	C.1	1.g
	4.6	Justifies cost given information needs	F3 P8	C.1	1.g

(continued)

Table 1 (continued)

King, Stevahn, Ghere, & Minnema (2001)		Essential Competencies for Program Evaluators	Joint Committee Program Evaluation Standards (1994)	AEA Guiding Principles (1995)	Canadian Evaluation Society Essential Skills Series (1999)
IIC4	4.7	Identifies needed resources for evaluation, such as information, expertise, personnel, instruments	None	B.1 B.2	None
IIIE	4.8	Uses appropriate technology	None	None	None
IIC5	4.9	Supervises others involved in conducting the evaluation	None	None	None
IIC6	4.10	Trains others involved in conducting the evaluation	None	None	None
IIC7	4.11	Conducts the evaluation in a nondisruptive manner	F1	None	None
IIC8	4.12	Presents work in a timely manner	U6	None	None
	5.0	Reflective Practice			
IVA	5.1	Aware of self as an evaluator (knowledge, skills, dispositions)	U2	B.1 B.2	None
IVE1 IVE2	5.2	Reflects on personal evaluation practice (competencies and areas for growth)	None	B.3	None
IVE IVE4	5.3	Pursues professional development in evaluation	None	B.3	None
IVE IVE5	5.4	Pursues professional development in relevant content areas	None	None	None
IVE3	5.5	Builds professional relationships to enhance evaluation practice	None	B.3	None
IIID	6.0	Interpersonal Competence			
IIIB	6.1	Uses written communication skills	U5	A.3 C.1 C.2 C.3 C.4 C.5 C.6 E.3	4.j
IIIC	6.2	Uses verbal/listening communication skills	P4	A.3 C.1 C.2 C.3 C.4 C.5 C.6 E.3	4.j
IIID1	6.3	Uses negotiation skills	P4 P7	C.1	None
IIID2	6.4	Uses conflict resolution skills	P4 P7 F2	E.4	None
IIID3 IIID4 IIID5	6.5	Facilitates constructive interpersonal interaction (teamwork, group facilitation, processing)	None	None	1.i 2.d
IIID6	6.6	Demonstrates cross-cultural competence	P4	D.5 E.1	None

Note: AEA = American Evaluation Association.

combinations of Roman numerals for *domains*, letters of the alphabet for *categories*, and Arabic numerals for *items* (illustrated as follows: *domain* IV. Evaluation Practice, *category* IVE. Professional Development, *item* IVE4. Updates personal knowledge in the evaluation field). Although methodical, this tiered numbering system made it difficult for individuals to readily remember as well as discuss the competencies.

The revised taxonomy of essential competencies for program evaluators presented in Table 1 displays a simpler categorization scheme that organizes the original set of competencies into six distinct competency categories, namely, (a) professional practice, (b) systematic inquiry, (c) situational analysis, (d) project management, (e) reflective practice, and (f) interpersonal competence—each of which more clearly identifies the specific competencies contained within. *Professional practice* competencies focus on fundamental norms and values underlying evaluation practice, such as adhering to evaluation standards and ethics. *Systematic inquiry* competencies focus on the more technical aspects of evaluation practice, such as design, data collection, analysis, interpretation, and reporting. *Situational analysis* competencies focus on analyzing and attending to the unique interests, issues, and contextual circumstances pertaining to any given evaluation. *Project management* competencies focus on the nuts and bolts of conducting an evaluation, such as budgeting, coordinating resources, and supervising procedures. *Reflective practice* competencies focus on one's awareness of evaluation expertise and needs for growth, including knowing oneself as an evaluator, assessing personal needs for enhanced practice, and engaging in professional development toward that goal. *Interpersonal competence* competencies focus on the people skills used in conducting evaluation studies, such as communication, negotiation, conflict, collaboration, and cross-cultural skills.

When presented in a linear fashion, the sequence of these six essential evaluator competency categories reflects the importance of first grounding all program evaluation practice on the norms, values, and standards underpinning the field; next exercising expertise in technical inquiry, situational analysis, and project management skills in planning and conducting evaluations; followed by continuously thinking about and striving to enhance one's own professional program evaluation practice. Finally, although it is difficult to imagine an effective program evaluation without interpersonal competence, that category is listed last because the need for effective people skills is not exclusive to the field of evaluation; instead, such skills are integral to effective practice across numerous disciplines. Despite the above rationale for ordering these major competency categories, we suspect that visually depicting them in a Venn diagram of six intersecting circles would more appropriately reflect their interconnectedness as they actually play out in evaluation practice.

Need for a Crosswalk Comparison

Any comprehensive taxonomy of evaluator competencies certainly should specify what evaluators need to effectively meet standards, adhere to principles, or apply guidelines endorsed by professional evaluation associations. We therefore identified associations in North America that endorse standards, principles, or guidelines against which we could conduct a crosswalk comparison. We delimited the crosswalk to include only those guidelines developed by organizations that primarily function to advance the professional practice of program evaluation at large. We excluded evaluation standards or competencies adopted by organizations with a narrower evaluation focus (e.g., the *Professional Competencies* of the Qualitative Research Consultants Association, 2003) and by those that use evaluation to accomplish other primary responsibilities (e.g., the *Evaluation Standards* of the Treasury Board of Canada, 2001; the *Responsibilities and Competencies* of the National Commission for Health Education Credentialing, 1996).

Three sets of program evaluation guidelines emerged for the crosswalk: (a) *The Program Evaluation Standards* endorsed by the Joint Committee on Standards for Educational Evaluation (1994), the *Guiding Principles for Evaluators* endorsed by AEA (1995), and the *Essential Skills Series in Evaluation* endorsed by the Canadian Evaluation Society (1999). Cross-

referencing these three sets of evaluation guidelines with the proposed taxonomy of essential evaluator competencies in King et al. (2001) was the first step toward the final comparison that appears in Table 1. Our steps and decision rules in preparing the initial crosswalk were the following:

1. Each author individually determined which essential evaluator competencies addressed the respective standards, principles, or skills in the other three guidelines.
2. The major intent (or grounding spirit) of each item was used for cross-referencing, rather than specific words or phrases taken out of context. For example, substandards under each of the four major standards in *The Program Evaluation Standards*, subprinciples under the five major principles in the *Guiding Principles*, and subskills under the four major *Essential Skills Series* classifications (which we sequentially labeled a, b, c, d, e, etc.) were interpreted within the context of the major category in which they were classified. The central intent of each standard, principle, or skill, and the language used to express it, had to be aligned with the major intent of the specific essential evaluator competency to which it was cross-referenced. Because the headings of the *Guiding Principles* include explanatory text, in some cases it was appropriate to cross-reference those headings separate and apart from their subprinciples.
3. Consensus among all four authors was required. Where disagreements existed, we thoroughly discussed our various interpretations, then systematically applied the second decision rule (detailed above) to reach total consensus.

Conducting the initial crosswalk proved useful for several purposes. First, it provided additional validation of the initial set of essential evaluator competencies in King et al. (2001) by showing substantial overlap between those competencies and the other guidelines (i.e., 62 of the 69 essential evaluator competencies in King et al. had at least one aligned standard, principle, or skill). Second, it provided an alternative method useful for systematically determining essential program evaluator competencies, distinct from (yet also useful with) the more commonly used "expert panel" method that relies on individual expertise and professional judgment. Finally, it revealed gaps in the King et al. taxonomy by pointing to additional competencies needed for achieving certain evaluation guidelines widely recognized as important by national evaluation associations.

The revised taxonomy of essential competencies for program evaluators in Table 1 expands the King et al. (2001) taxonomy by including additional knowledge, skills, or dispositions that evaluators need to both conduct and produce the type of sound evaluations specified by the standards, principles, and guidelines endorsed by the major evaluation associations in North America. After completing the revision, we prepared a second crosswalk (displayed in Table 1) using the same consensus procedure and decision rules described earlier. Again, substantial overlap exists between the revised taxonomy of competencies and the guidelines endorsed by the major evaluation associations (i.e., 53 of the 61 competencies classified across the six major categories had at least one aligned standard, principle, or skill). In the next section, we identify the additional competencies in the revised taxonomy and provide a rationale for their inclusion.

Need for Additional Competencies

The initial crosswalk that compared the taxonomy of essential evaluator competencies in King et al. (2001) with the standards, principles, and skills endorsed by major evaluation associations in North America (described above) revealed a need to make the essential evaluator competencies more comprehensive. First, we inspected the initial crosswalk to identify which items in the other guidelines were not addressed by the initial set of essential evaluator competencies in King et al. We then deliberated on the centrality of those items to the field of program

evaluation at large, reached consensus on the degree to which we believed those items were significant, then developed additional competencies to support those items that we agreed were important. Table 1 presents the revised taxonomy of essential competencies for program evaluators containing 13 additions. One addition, a major classification category (5.0 Reflective Practice), resulted from reorganizing the competencies in King et al. into their current user-friendly format. The other 12 additions resulted from the need to further elaborate critical dimensions of the six major category classifications. Those additions are the following:

2.6 Specifies program theory
2.11 Assesses validity of data
2.12 Assesses reliability of data
3.1 Describes the program
3.2 Determines program evaluability
3.3 Identifies the interests of relevant stakeholders
3.5 Addresses conflicts
3.6 Examines the organizational context of the evaluation
3.8 Attends to issues of evaluation use
4.2 Negotiates with clients before the evaluation begins
4.4 Communicates with clients throughout the evaluation process
4.6 Justifies cost given information needs

In addition, 10 competencies in King et al. (2001) do not appear in Table 1. Those competencies are noted in Table 2 along with explanations for their omission. Specifically, in King et al., several broad *domains* (II and III) and main *categories* (IA, IB, and IC) became unnecessary in the revised user-friendly format. Several competency *items* also were omitted because they pertained to research rather than evaluation (IA1 and IA2), exclusively focused on needs assessment without specifying other types of studies (IB2), or too broadly focused on stress management without specifying other personal characteristics (IIC9). Finally, we also omitted the "logical and critical thinking" competency (IIIA) in King et al. because such thinking is an integral component underlying virtually all other evaluator competencies, especially those that directly require determining strengths and limitations of studies, providing rationales for decisions, weighing alternatives, making reasoned judgments, and so on (see, e.g., Table 1, competencies 2.17 and 2.19). This was in contrast to written and verbal/listening communication skills that can be taught independently and hence remain separate competencies.

Need for Precision Within Each Competency

The process of striving for a comprehensive taxonomy of essential competencies for program evaluators also led us to rethink competencies in King et al. (2001) that included more than one descriptor. For example, item IA4 in the original taxonomy incorporated three descriptors, referring to competence in quantitative, qualitative, and mixed methods. An item that incorporates multiple descriptors may jeopardize future usefulness of the taxonomy as a tool for self-assessment given that an evaluator may possess different levels of proficiency on each descriptor within that item. We therefore, whenever possible, uncoupled multiple descriptors contained in the same item, presenting each as a separate competency in the revised taxonomy presented in Table 1. For example, competency 2.2 addresses one's knowledge about quantitative methods, competency 2.3 addresses knowledge about qualitative methods, and competency 2.4 addresses knowledge about mixed methods. In some cases, however, we maintained multiple descriptors within one competency because of the close and somewhat insepa-

Table 2
Competencies in King, Stevahn, Ghere, & Minnema (2001)
Omitted in the Revised Taxonomy in Table 1

Classification	King et al. (2001) Competencies Omitted	Description	Reason for Omission
Domains	II	Competent Evaluation Practice	This broad domain is not needed in the revised taxonomy that reorganizes competencies into six specific major classifications.
	III	General Skills for Evaluation Practice	This broad domain is not needed in the revised taxonomy that reorganizes competencies into six specific major classifications.
Categories	IA	Able to do research-oriented activities	This category pertains to research (not evaluation) and therefore does not apply to the revised taxonomy.
	IB	Able to do evaluation-oriented activities	This category is not needed because it applies across the entire revised taxonomy.
	IC	Able to do activities common to both research and evaluation	This category is not needed because the revised taxonomy applies to evaluation practice (not research).
	IIIA	Logical and critical thinking skills	This separate category is not needed because critical thinking underlies virtually all other competencies in the revised taxonomy.
Items	IA1	Framing the research question(s)	This item pertains to research (not evaluation) and therefore does not apply to the revised taxonomy.
	IA2	Research design	This item pertains to research (not evaluation) and therefore does not apply to the revised taxonomy.
	IB2	Needs assessment	This item is omitted because the revised taxonomy does not specify particular types of studies; instead, evaluations should be designed to address questions (as indicated in Table 1, competencies 2.7 and 2.8).
	IIC9	Able to deal with stress during a project	This item is too broadly focused and more appropriately is subsumed by competencies 5.1 and 5.2 in Table 1.

rable nature of the descriptors (specifically, see competencies 1.2, 1.3, 1.4, 1.5, 2.18, 2.19, 3.10, 5.2, and 6.2). For example, competency 1.2 speaks to the importance of acting ethically and striving for integrity and honesty in conducting evaluations. Ethical behavior, integrity, and honesty are so intertwined that it seemed most prudent to incorporate all of those descriptors in one competency, rather than listing each separately.

Need for a Revised Taxonomy Now

We believe that the ultimate aim of any useful comprehensive taxonomy of program evaluator competencies should be its broad validation and widespread endorsement by professionals

in the field. Realistically, this involves a long-term endeavor. Various steps in the process include reviewing the program evaluation literature, formulating initial taxonomies that can merge into one, establishing face validity, seeking diverse input for revision, determining validation strategies, exploring validation in different geographic regions or specific sectors of practice, pursuing widespread validation across the entire field of professional practice, revisiting and refining any agreed-upon taxonomy in light of new developments within the field, and so on. The taxonomy of essential competencies for program evaluators in this article represents our progress on this long-term path, begun in 1998 and first reported on in King et al. (2001).

Although some may argue that it is premature to present the revised taxonomy of essential competencies in Table 1 prior to its formal validation within the field at large, we believe that making it available now is a useful interim step. Doing so promotes the type of continued discussion and critique necessary for determining the extent to which broad consensus on a common set of competencies can be reached by program evaluators who represent unique roles and work across diverse situations. Indeed, we believe that such a set of competencies would benefit program evaluators in multiple ways, especially (as noted earlier) by providing a foundation on which to improve training, enhance reflective practice, advance research on evaluation, and further professionalize the field. In the meantime, however, providing substance to advance the discussion seems prudent given the recurring interest in the topic during the past decade. Such interest not only has been evident in the literature (see, e.g., Altschuld, 1995, 1999; Fitzpatrick et al., 2004; Mertens, 1994; Patton, 2001; Smith, 1999) and at professional evaluation association meetings (see, e.g., Altschuld & Bickman, 1998; Covert, 1992; King, Minnema, Ghere, & Stevahn, 1998; King, Stevahn, Ghere, & Minnema, 1999; Smith, 1998) but also is a focus within organizations currently working to establish sets of professional competencies relevant to program evaluation (see, e.g., Council on Linkages Between Academia and Public Health Practice, n.d.; International Board of Standards for Training, Performance, and Instruction, 2003; also D. F. Russ-Eft, Editor, *Human Resource Development Quarterly*, personal communication, June 30, 2004). In addition, we find the taxonomy in Table 1 to be a useful professional development tool in programs we facilitate. In its present form, the taxonomy serves as a springboard for meaningfully engaging evaluators in focused reflection, self-analysis, and group discussion on a wide array of knowledge, skills, and dispositions associated with practice.

Future Initiatives

Two major activities are needed to solidify a taxonomy of essential program evaluator competencies for widespread use. The first is to systematically conduct a comprehensive validation study to determine the extent to which program evaluators across the entire field can reach consensus on the importance of a set of essential competencies for professional practice. Doing so will require including a broad representative sample of evaluators in the validation process who represent diverse evaluation roles, orientations, and interests—much like the constituents of organizations such as AEA, an organization well positioned to pursue competency development and endorsement in the future. It also will require defining terms to promote consistency in meaning and shared understanding. We currently are preparing a glossary of terms used in the revised taxonomy in Table 1, a sample of which appears in Table 3.

The second activity will be to construct descriptive rubrics for the essential evaluator competencies that specify various levels of performance proficiency. Most immediately, such a tool would prove useful for self-assessing one's own skills as an evaluator, thereby also illuminating areas for professional development. In addition, such rubrics could immediately be applied in

Table 3
Sample Glossary of Selected Terms in the Revised Taxonomy in Table 1

Term	Definition
Conflict	When incompatible interests and/or actions occur among humans
Ethical behavior	Actions that embody the accepted ideals that govern the conduct of a profession
Evaluation approach	A general orientation toward conducting a program evaluation useful for addressing particular questions, for example, consumer-oriented, objectives-oriented, management-oriented, expertise-oriented, or participant-oriented approaches to evaluation, to name a few
Evaluation design	Specifies the evaluation questions, data sources, data collection and analysis methods, and procedures for conducting an evaluation study and reporting results; a plan for conducting an evaluation
Evaluation standards	Standards or principles approved by national evaluation associations and widely accepted within the field, for example, the Joint Committee's *Program Evaluation Standards*, the American Evaluation Association's *Guiding Principles for Evaluators*
Honesty	Lacking deceptiveness; marked by integrity
Integrity	Adherence to an ethical code of conduct
Meta-evaluation	Evaluation of a program evaluation study
Mixed methods	Using both quantitative and qualitative data collection and analysis methods to address evaluation questions
Program theory	A program's logic model, sometimes referred to as a program's theory of change; assumptions underlying the effectiveness of a program; explanation of the mechanisms believed to make a program effective

program evaluation training programs to evaluate formative progress or summative achievement. Finally, in the long term, rubrics would be useful in any future credentialing or licensing effort that may be pursued by specific organizations or by the field at large.

Just as *evaluation standards* provide guidance for making decisions when conducting program evaluation studies, *evaluator competencies* that specify the knowledge, skills, and dispositions central to effectively accomplishing those standards have the potential to further increase the effectiveness of evaluation efforts. Inspired by evaluation's can-do spirit, we believe that continuing to work toward an agreed-upon set of competencies fundamental to effective practice is critical to the advancement of the field. Although some may question the underlying behavioral grounding implicit in any set of competencies, increasingly we see growing interest and action in this area. For example, in professions other than evaluation, such as health care and education, we see evaluator competencies embedded in credentialing and accreditation qualifications (see the National Commission for Health Education Credentialing's [1996] *Responsibilities and Competencies* or the National Council for Accreditation of Teacher Education's [2002] *Professional Standards for the Accreditation of Schools, Colleges, and Departments of Education*). We also see national evaluation associations such as the Japanese Evaluation Society examining the feasibility of accreditation schemes that necessarily require the identification of desired evaluator skills (see Nagao, 2003). For those grappling with competency issues toward the continuous improvement of program evaluation practice, we offer the revised taxonomy of essential competencies for program evaluators in hope of its usefulness. We also hope that it provides meaningful substance for fueling ongoing and rigorous critical discussion among program evaluators seeking to further professionalize the field.

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