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# Evaluator Education for the Twenty-First Century: The Centrality of Developing Evaluators' Interpersonal Competencies

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**Background:** The disruptions stemming from the COVID-19 pandemic suggest that traditional ways of conducting evaluations cannot proceed as usual. But they also create opportunities for meaningful reflection and changes to evaluation education and practice.

**Purpose:** The purpose of this article, grounded in the use of evaluator competencies and evaluator education, is to highlight the interpersonal domain as an undervalued competency domain essential to current good practice.

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The multiple disruptions stemming from the global COVID-19 pandemic have created unavoidable consequences for all that follows. The grim reality of any pandemic that threatens the lives and well-being of millions of people may make the very idea of program evaluation appear less significant. In such a context one can sincerely ask whether people should spend existing resources on evaluation instead of tackling issues directly related to easing the pandemic. Surely, in this reality, traditional ways of conducting evaluations simply cannot proceed as usual. But this dark cloud may well create a silver lining in the form of opportunities for meaningful reflection and changes to evaluation education and practice. In that light this article presents content I believe to be relevant to the current and future education of evaluators. Given my personal commitment over two decades to the development of evaluator competencies (King et al., 2001; Stevahn et al., 2005; King, 2020), the article is grounded in the past 20 or so years of scholarly and practical work related to competencies, as well as in the lessons stemming from the COVID-19 pandemic.

Let me begin with an introductory comment regarding the long-standing distinction in educational writings between *training* and *education*, a distinction that our field has routinely ignored. Cambridge Dictionary (n.d.) defines “training” as the “process of learning the skills you need to do a particular job or activity.” Training is context-specific; tasks are consistent and relatively predictable into the future. By contrast, Merriam-Webster (n.d.) defines “education” as the “process of gaining knowledge, skill, and development from study or training.” Education, then, is a broader concept that includes training, but encompasses a variety of settings in which change is likely and relies on a learner’s ability to interact with and adapt to situations as they evolve. Although for years authors writing about evaluator education have routinely referred to “evaluator training,” I believe that ultimately this is limiting given the current pace of change in both the contexts and activities of social programs. What we need to reflect on is the *education* of evaluators, their preparation for careers where continuing change is a given and where they must routinely adjust their practice to emergent situations. Like other crises, the COVID-19 pandemic presented a powerful case for the need to modify practice on the fly. What does evaluation look like, for example, when entire

communities are forced to shut down? As curricula for evaluator education evolve, the distinction between training and education may become meaningful, contrasting general preparation (education) with preparation for specific contexts and situations (training). However, having noted the distinction, I, too, at least in this article, will continue the tradition of using the terms interchangeably.

This article begins with a brief historical review of professionalization and the development of evaluator competencies, primarily in the United States, underscoring the potentially helpful role of competencies in general for discussions of professionalization. Because we are discussing what to teach evaluators, it also grounds the discussion in the current status of evaluator education (King & Ayoo, 2020). A second grounding section details two broad roles for evaluators. This framing has implications for the application of the one competency domain in which, I believe, given the current international environment, an evaluator educated in 2023 must become truly proficient: the interpersonal domain. Perhaps unexpectedly, this domain has not to date been a focus for evaluator education. I believe that must change.

## The Development of Competencies for Professional Evaluators

Since its inception in the 1960s, the field of evaluation has professionalized in several ways. There is an increasing demand for evaluators’ services; evaluators can support themselves in full-time jobs; and numerous professional associations, evaluation-specific journals, and university-based programs for preparing evaluators exist, as well as professional development options, both in person and online. In addition, two foundational documents—the program evaluation standards (Yarborough et al., 2010) and the guiding principles of the American Evaluation Association (AEA, 2018)—have both been regularly revised, reflecting the continuing evolution of standards for good practice.<sup>1</sup> Despite these developments, however, evaluation is not yet a fully established profession. The three ways that it fails to be one remain almost 30 years after Worthen (1994) first documented them: (a) In most settings there are no procedures

<sup>1</sup> One anonymous reviewer wrote the following comment, which is clearly true: “At this stage in the global environmental crisis and its connection to pandemics, it is important to acknowledge that what is considered good

practice is limited to evaluation in human systems and does not consider or address environment, climate, and related critical matters.” See Rowe and Uitto (this issue).

for the credentialing or licensure of evaluators,<sup>2</sup> (b) there are no mechanisms to exclude unqualified individuals from evaluation's professional associations, and (c) professional associations continue to have little influence on preservice preparation programs for evaluators, including a lack of program accreditation.

This situation results in part from the continuing disjointed state of evaluator education. Some people study evaluation in university courses or programs; some learn through a series of self-selected professional development training sessions; still others train on the job while they work on evaluation projects. One thing is clear: Relatively little is known about how to effectively teach people to become evaluators. Sandra Ayoo and I (King & Ayoo, 2020) summarized the peer-reviewed literature on the topic (1978–2018), noting that scholarly work on the education of new and novice evaluators has not paralleled the growth of the field. The article cites numerous directories of university programs and reviews the results of the limited number of empirical publications to date, but its overarching conclusion highlights multiple areas that remain to be studied. Overall, then, it is fair to say that the contemporary training of evaluators remains largely undocumented and unresearched. In many cases evaluator education is neither formal nor systematic, and in many university settings it focuses on a limited set of topics: the technical aspects of data collection methods and analysis (LaVelle, 2020).

One thing that has changed fairly recently in the field's discussion of professionalization, however, is the fact that evaluator competencies are now integral to the conversation. After 70 or so years, individuals and professional associations are detailing the specific knowledge, skills, and abilities (KSAs) that professional evaluators need for competent evaluation practice. At one point some doubted that it would be possible to create a single comprehensive set of such competencies (Smith, 1999). But starting over 20 years ago, a group of researchers in Minnesota began a process to do just that, i.e., to develop and initially validate a set of general competencies for evaluation practice. The competencies presented in the initial publication (King et al., 2001) were extensively revised after a thorough comparison of the original set with three other foundational documents: (a) the second edition of *The Program Evaluation Standards*, endorsed by the Joint Committee on Standards for

Educational Evaluation (1994); (b) the revised *Guiding Principles for Evaluators* endorsed by the American Evaluation Association (1995); and (c) the Essential Skills Series in Evaluation endorsed by the Canadian Evaluation Society (1999). After 4 years the analysis led to the publication of an article establishing essential competencies for program evaluators (ECPEs; Stevahn et al., 2005). In the decade following the competencies' publication, professional associations around the world used them in various ways; for example, for personal or organizational reflection on evaluation capacity, as a structure for organizing professional development, or as input to their own sets of competencies (Tucker et al., 2020).

In the United States, the next step in competencies development began in 2015 when the AEA board of directors created a competencies task force (which I chaired) and charged it with developing a set of competencies for AEA as well as structuring conversation about the association's further professionalization.<sup>3</sup> The ultimate set of competencies, based on an exhaustive comparison with 11 existing sets of English-language evaluator competencies and 3 years of AEA membership engagement, included five domains:

1. Professional practice, focusing on “what makes evaluators distinct as practicing professionals”
2. Methodology, focusing on “technical aspects of evidence-based, systematic inquiry for valued purposes”
3. Context, focusing on “understanding the unique circumstances, multiple perspectives, and changing settings of evaluations and their users/stakeholders”
4. Planning and management, focusing on “determining and monitoring work plans, timelines, resources, and other components needed to complete and deliver an evaluation study”
5. Interpersonal, focusing on “human relations and social interactions that ground evaluator effectiveness for professional practice throughout the evaluation” (AEA, n.d., p. 3)

As the development process evolved (2015–2018), knowing that AEA was the largest voluntary organization for professional evaluation (VOPE) in the world, our competencies task force was keenly concerned about how people might perceive any proposed competencies. We worried that, for some,

<sup>2</sup> Both the Canadian Evaluation Society and the Japan Evaluation Society have processes for credentialing evaluators, but these result in professional credentials, not government-sponsored licenses.

<sup>3</sup> Elsewhere (King, 2020) I have documented in detail the three years of task force activities leading to the 2018 board approval of the AEA evaluator competencies.

the promulgation of competencies might appear to hold the potential to limit newcomers' access to the field (King & Stevahn, 2020; Matthias, 2022). We also feared that some might view our development of these competencies as evidence of a move to define or dictate quality evaluation practice worldwide, i.e., as an assertion that these competencies developed in the context of AEA's members' evaluation practice (which was our charge) somehow captured the details of excellent practice in any context (King & Stevahn, 2020). Knowing that creating a universal list of competencies was neither possible nor our intention, we emphasized the value and importance of evaluation professionals adapting sets of competencies for use in specific organizations and contexts. We have known for years that context affects evaluation practice (Rog et al., 2012), and the competencies essential in one setting may differ dramatically from those needed in another. Therefore, there can never be one set of competencies carved in stone for all time and all places. As Tucker, Stevahn, and King (2022) put it, "Evaluation professionals must never consider any set of competencies, standards, or principles to be permanent ... [I]t's helpful to envision these as written in pencil, ready for revision as needed" (p. 7).

The competencies, then, provide a structure for reflecting on evaluation practice in any context. This is why they are a helpful addition to discussions of professionalization. A number of key actors—evaluators, those who commission or fund evaluations, potential users, etc.—can and should use the competencies to discuss what high-quality practice requires in settings both large and small. These settings range from understaffed nonprofit organizations seeking to improve client services, to well-funded government agencies accountable for programs costing millions of dollars, to international aid organizations that provide funding to agencies in multiple countries, and so on. And there may be no expectation that one individual will possess every competency; not surprisingly, the use of teams that combine the expertise of multiple members is commonplace.

Why should evaluators think about competencies now? As noted earlier, the COVID-19 pandemic created an opportunity to collectively examine the requisite competencies for the education of future—and, I would suggest, even for updating those of current practicing—evaluators. The dramatic increase in the use of technology for meetings and data collection during the pandemic, for example, will not go away when things return to a new normal. We will live in a different world as

this and future pandemics evolve, and evaluation must adapt if it is to remain meaningful and effective.

To be clear, the challenge of our field's continuing professionalization remains. Yes, there are standards, guiding principles, and many sets of competencies, but we do not know to what extent these are applicable or helpful to university-based education programs or to field-based professional development. What is certain, though, is that discussions of professionalization are now routinely taking place around the world, suggesting that progress is possible.

So what are the competencies that I personally believe demand emphasis in the world we now live in? As noted above, I would suggest emphasizing one domain: the interpersonal. Before providing details about the importance of these competencies, I need to describe two distinct roles for program evaluators that affect how they interact with their clients, implementation partners, program participants, etc. This distinction matters because the people who hire us and the role we are asked to play directly affects the evaluation process and the competencies required to do our job.

## Two Broad Roles for Program Evaluators

In an article published over 25 years ago, Carol Weiss distinguished between two types of evaluators: (1) objective outsiders, and (2) evaluators who collaborate closely with program staff (Weiss, 1997). What distinguishes them are whom they work for and how they interact with program participants. Both require interactions to enable them to understand the program's history and context; its organizational structure and politics; the people who are leading, staffing, and taking part in programs; community issues that affect what is occurring or what can or might occur; and so on. However, because their approaches differ, what those interactions look like and their timing and extent may differ.

### *Objective Outsider*

Putting it in the extreme, the role of the evaluator as objective outsider is to gather non-biased data using methods that are as rigorous as possible in context while remaining separate from, i.e., uninfluenced by, the workings of an organization. Typically (although not always), these evaluators are hired by and responsible to the people who commission studies (program funders or political

actors), who have resources, power, and privilege. These evaluators often direct the evaluation process from beginning to end, engaging participants as needed both to conduct the study and, necessarily, as sources of data. Such studies are routinely part of accountability mechanisms and play an important and, indeed, essential role in the operation of social programs. An explanatory image I find helpful is that of the parachute jumper who drops into a program, interacts there for a short time to gather what is needed, and then leaves to prepare a report.

### *Interactive Collaborator*

By contrast, evaluators who collaborate closely with program staff don't just drop in and remain independent as they work; they are purposefully embedded and actively engaged with participants over the course of the study and perhaps beyond. In this role, they typically report to organizational staff and leaders and/or to participating community members, and their interactions are extensive—designed to inform the evaluator, but also to allow participants to influence the evaluation process and its outcomes. To do this, collaborative evaluators connect with and engage the people involved in the program for a meaningful period of time. In communities that feel marginalized and powerless, where perceived outsiders routinely develop and implement programs, such an approach may provide multiple benefits related to social justice, potentially “making the invisible visible” (Matthias, 2022, p. 88), “reframing ... [issues] to support action” (p. 89), “creating conditions for authentic participation” (p. 85), and “addressing historical injustices” (p. 84).

Interestingly, and perhaps not surprisingly, these two approaches are not new. They roughly parallel the approaches that Progressives in the United States used in the late 19th and early 20th centuries as political actors sought to improve society (King, 2007). Conservative Progressives focused on using scientific methods to study and resolve society's ills (e.g., with large-scale public health, education, and social service research-like evaluation projects); liberal Progressives focused on democratic processes to engage citizens and collaboratively construct viable solutions (e.g., through community-based programming with inclusive interaction and democratic deliberation). They may have had similar criteria for significant social improvement—although what that desired improvement may have looked like could well have differed—but they clearly relied on different values and activities. Similarly, the roles of objective

outsider and interactive collaborator may affect how evaluators interact with evaluation participants. This brings us, then, to the domain of evaluator competencies I believe to be critical across *all* evaluations, regardless of an evaluator's role.

## The Fundamental Role of Interpersonal Competencies

Interpersonal competencies relate to evaluators' knowledge, skills, and abilities (KSAs) for working with people in any setting. Table 1 presents the interpersonal competencies (Domain 5) of the 2018 board-approved AEA evaluator competencies. The competencies in this domain are the least specific to the field of evaluation because many other professions, especially the caring professions (e.g., psychology, medicine, and social work), require KSAs in these areas.

But in the brave new world in which we now live, I believe that they take on singular importance in evaluation practice. As the introductory description to the AEA evaluator competencies notes, the interpersonal competencies “focus on human relations and social interactions that ground evaluator effectiveness for professional practice throughout the evaluation” (AEA, n.d., p. 3). This highlights the need to interact positively with evaluation participants, by creating “positive relationships” (5.1), actively listening to people who may have “different perspectives” (5.2), and working to develop trust, not only initially, but “throughout the evaluation” (5.4). According to these competencies, evaluators should never make decisions unilaterally, but rather should engage participants in “shared decision making” (5.3) as appropriate and to the extent possible. Given the unavoidably political nature of evaluation, these competencies note the need to address issues of “power and privilege [as they may] affect evaluation practice” (5.5). They also demand skilled communication (5.6) and “constructive and culturally responsive interaction” from beginning to end (5.7), along with the ability to address conflicts that arise “constructively” (5.8).

Owing to the extensive overlap across domains, there are at least two competencies from other domains that deserve mention here. First, Competency 1.1 from the Professional Practice domain, “acts ethically...,” must be a given for every evaluation. The initial draft of the AEA competencies included an ethical competency as the first competency in each of the five domains. Following feedback that strongly criticized such repetition, the task force removed explicit reference

to ethics from four domains and made acting ethically the very first competency under Professional Practice, highlighting its centrality to our work. A second overlap appropriate to mention here is Competency 3.1 from the Context domain, “responds respectfully.” It highlights the importance of respect, which is surely an interpersonal skill.

My focus on this domain should surprise no one. A decade ago Laurie Stevahn and I published a book entitled *Interactive Evaluation Practice: Mastering the Interpersonal Dynamics of Program Evaluation* (King & Stevahn, 2013). Its content was grounded in social interdependence theory (Deutsch, 1949; Johnson et al., 2011), which highlights the interactive nature of people’s relationships, and generated seven two-word principles for evaluators to consider when working in different settings: (a) get personal, (b) structure interaction, (c) examine context, (d) consider politics, (e) expect conflict, (f) respect culture, and (g) take time. Table 2 crosses these principles with AEA’s eight interpersonal competencies. This comparison is informal—my personal assessment—and individual tick marks are surely open to debate. But the point I am making is that there is a great deal of overlap.

The only interactive evaluation practice (IEP) principle for which I do not see an overlap with the interpersonal competencies is “examine context.” This makes sense to me because the AEA evaluator competencies have an entire and separate domain devoted to context; it is presented in Table 3. As the domain description puts it, context relates to specific educational outcomes for evaluators seeking to engage with communities. It “focuses on understanding the unique circumstances, multiple perspectives, and changing settings of evaluations and their users/stakeholders. Context involves site/location/environment, participants/stakeholders, organization/structure, culture/diversity, history/traditions, values/beliefs, politics/economics, power/privilege, and other characteristics” (AEA, n.d., p. 3).

The interpersonal competencies are necessarily enacted in a variety of contexts, and evaluators must literally bring them to life in the specific settings that they need to understand thoroughly. To do that, they need highly developed interpersonal competencies. Martin Buber once noted that “all actual life is encounter” (1923, as quoted in Goodreads, n.d.-a). In the current context I would modify this to read, “All actual *evaluation* is encounter.” I believe that the skill with which an evaluator builds relationships and handles interactions throughout an evaluation will in large

part determine both the success of the process and of its eventual outcomes.

What does this mean in practice? It seems obvious that each of the interpersonal competencies can manifest itself differently not only owing to different roles, but also depending on context. Consider different types of studies—evaluator-led, collaborative, or participant-directed (King & Stevahn, 2013)—grounded in diverse kinds of settings—e.g., large, well-funded, multisite national projects; routine studies in an agency in a state government; or unfunded evaluations in single, small non-profits. To highlight just one competency (5.13), “facilitates shared decision making” will necessarily look different depending on the setting. Is shared decision-making possible? Appropriate in this context? If so, who needs to be involved in the process and for what decisions? And so on. In any case, every evaluator must engage decision makers and participants in one way or another—in that sense, every evaluation is participatory—and their ability to do so thoughtfully will be key to ensuring the quality of a study. In addition, paying attention to power and politics, large and small, is an ongoing challenge, and when conflict arises, evaluators must determine how to address it in ways that do not derail the evaluation process.

### *Developing and Honing Evaluators’ Interpersonal Competencies*

In my view and in light of the interpersonal competencies and IEP principles, practicing evaluators should engage in four overarching activities while working in *any* community—whether local, regional, national, or international. These ideas become especially important if evaluators are actively engaged in communities of which they are not members.

*Remember to be Humble.* First, evaluators should enter every setting with humility and openness, even eagerness, to learn about what it is like to live and work there. They must be willing to eschew the role of expert and, regardless of their training and professional commitments, *not* focus primarily on measurement and methods initially and *not* be the outside expert who may unintentionally threaten people with an external perspective and expansive knowledge.

To my mind, the importance of thoughtfully considering and respecting culture—in terms both of people’s beliefs, customs, and traditions and of their organizational norms—cannot be overstated, as the literature in recent years has made clear (SenGupta et al., 2004; Chouinard & Cram, 2020).

Competent evaluators use *all* of the interpersonal competencies in addressing the culture of those with whom they work, and one path to doing this is interacting with and getting to know and understand key individuals, regardless of their formal roles. For millennia, people in communities have made decisions for specific reasons, and evaluators should first understand the emic systems that exist through which people—those making decisions—create or gain knowledge and then use it to address concerns or to solve problems. Before the evaluator got there, people were making decisions, and they will continue to do so once the evaluator has gone, so, as outsiders, evaluators need to learn and understand how things work. Matthias (2022) shares the words of one respondent, a practicing evaluator, on this subject:

When evaluators lacking deep contextual knowledge of communities work in those communities, ... [this interviewee] noted that “you spend more money educating the evaluator about what is in this field ... and they adapt their material without really understanding who the people they are working with [are],” which could ultimately result in damage to the programs and resources that organizations work to provide for their communities. (p. 93)

Several context competencies (“attends to systems issues within the context” [3.4], “facilitates shared understanding of the program and its evaluation with stakeholders” [3.6], and “clarifies diverse perspectives, stakeholder interests, and cultural assumptions” [3.7]) certainly come into play, but I believe it is an evaluator’s interpersonal skills that are essential to learn about and more fully understand how people make decisions within an evaluation context. Albert Einstein is purported to have said, “A true genius admits that he/she knows nothing” (Goodreads, n.d.-b). Perhaps it would behoove us all to behave as true geniuses when we enter evaluation settings.

*Develop Relationships Intentionally.* The longer I am an evaluator, the more firmly I recognize the extent to which the evaluation process is grounded in human relationships. If real estate sales are based on location, location, location, then evaluations are based on relationships, relationships, relationships. Absent working relationships, the evaluation process may well fail—and, worst of all, insensitive or oblivious evaluators may not even realize that it has. Evaluators need to develop and then build on ongoing relationships in order (a) to understand the study context as fully as

possible and (b) to engage individuals in that setting in evaluative processes and thinking. Thankfully, two long-standing ideas in the literature provide ways to actively connect with people:

1. First, the *personal factor* of utilization-focused evaluation, first named in the late 1970s, “... is the presence of an identifiable individual or group of people who personally care about the evaluation and the findings it generates” (Patton, 1978, p. 66, emphasis in original). Paying attention to the personal factor requires evaluators to identify the specific people who can and will use the evaluation process and/or its results and work with them to ensure that whatever happens as a result of the evaluation will provide the information they want. I have long maintained that because everyone is an evaluator (King, 2023), people are readily able to identify questions they would like answered and have a sense of the information that would be most helpful in answering them, creating a way to engage our clients in meaningful discussion.
2. Second, the *interpersonal factor* highlights an evaluator’s ability to do two things:

...“(a) interact with people constructively throughout the framing and implementation of evaluation studies and (b) create activities and conditions conducive to positive interactions among evaluation participants. The interpersonal factor is the mechanism that brings the personal factor to life and enables it to work.” (King & Stevahn, 2013, p. 6)

Thoughtful attention to the personal and interpersonal factors can help to create productive relationships and allow evaluators to better understand the evaluation setting and its participants. Evaluators cannot ignore obvious concerns—contentious political dynamics, contracts with impossibly short timelines, demanding studies that are underfunded, and even situations where potential corruption may determine an evaluation’s outcomes in advance. Applying humility and the personal and interpersonal factors in concert creates the possibility of meaningful relationships that can help to facilitate an evaluation.

*Structure Interactions Purposefully.* A third activity—and one clearly related to the first two—is that evaluators need to be skilled in interacting in communities, remembering that these communities were functioning before the

evaluation began and will continue to function when the study ends.<sup>4</sup> They can do this by paying close attention to every interaction in which they take part, using what social psychology has taught us about cooperative interaction to structure evaluation activities in ways that actively engage people (King & Stevahn, 2013). The research literature suggests that this can help to build essential relationships, facilitate shared decision-making, enhance communication, and even assist in managing the conflicts that will inevitably arise (Johnson et al., 2011; Stevahn & King, 2005). Evaluators should identify key stakeholders for these interactions, seeking to be inclusive of diverse viewpoints.

As discussed above, the role the evaluator plays—“objective outsider” vs. “interactive collaborator”—can affect what happens during interactions, as can the amount of resources available to conduct the study, which can easily limit the number of possible interactions. Related to evaluator roles, there is also an overarching tension between what I call evaluation for accountability or control and evaluation for development or learning (King, 2007). While the two approaches are not entirely distinct, I find them helpful as overarching categories of approaches to evaluation, what William Safire calls *usefulness* (Patton, 2007). The learning approach may yield a potential benefit by building evaluation capacity in communities over time. This may include creating structures for routine monitoring and evaluation, for community members to express themselves collectively, and for making them aware of the multiple systems that affect their lives and what is potentially needed to change them.

*Foster Diverse Participant Roles in Evaluation.* During the evaluation process, people rarely serve only as sources of data; they are typically willing to engage in evaluations in different ways and having them do so can prove helpful. A fourth activity for implementing interpersonal competencies, then, is to consider the following options, two of which are possible in every study and the third of which may be more easily enacted in a collaborative evaluation.

- *The sponsor/backer:* An important (and sometimes overlooked) competency relates to an evaluator’s ability to secure positional leaders’ support, or, if that is not possible, at least their willingness to allow the evaluation

process to move forward. Absent such support, the process is unlikely to go well or be sustained. Evaluators need to purposefully engage key leaders to ensure support for the process, including access both to resources and to people and materials. It is helpful if leaders clearly and overtly value the process—this is the clout factor at work (King & Pechman, 1984)—and encourage others to participate. They can facilitate activities because of their position and ultimately encourage or even mandate the use of results. Sadly, this does not always occur. A discouraging example from my practice involved a social service agency whose leader delegated evaluation responsibilities but ultimately, unwilling to spend money on a process she didn’t value, cut all funding for evaluation in the early days of a budgetary crisis.

- *The evaluation advocate:* One interpersonal competency relates to an evaluator’s ability to identify, support, and collaborate with evaluation advocates in situ. Past literature has referred to these individuals as “evaluation champions” (e.g., King & Volkov, 2005), but because that term suggests competition and winners/losers, the participants in a recent study (Rogers, 2021) identified a more apt term, one that they preferred: “evaluation advocate.” The cases Rogers described included nine specific actions that these advocates took within their organizations: (a) advocating for support and resources; (b) motivating others; (c) providing energy, interest, and enthusiasm; (d) providing or accessing tools, resources, networks, and expertise; (e) helping others to apply evaluative thinking, use evaluation findings, and create opportunities for reflection; (f) assisting, training, mentoring, and supporting evaluation while considering different perspectives; (g) considering how evaluation can be strategically promoted and used for organizational change; (h) asking and encouraging others to ask critical questions and initiate discussions and debates; and (i) developing engaging ways to explain details and develop a common vision (Rogers, 2021, pp. 100–101). If sustainability of the evaluation process is of interest, being able to identify such individuals and collaborate with them over time are especially helpful skills.
- *The evaluation liaison:* A third possible role expands the role of the evaluation advocate.

<sup>4</sup> The question of what “community” means in evaluation settings is nontrivial and often complex, as settings may

comprise numerous communities. I acknowledge this as an issue, but it is not the subject of this article.



The idea is to teach community members enough about the evaluation process and its outcomes so that they are able to do two things: (a) actively engage others and provide ongoing support and (b) serve as a direct and visible connection between the evaluators and community members. These liaisons are not only evaluation advocates; they are knowledge workers specific to their community setting. By learning about the evaluation process, they could actively represent community interests and reduce the possibility of their interests being overlooked or marginalized. They would not receive formal training as evaluators—this is not about teaching high-level methodology, for example—but they would know enough about evaluation to give voice to issues within the community, to raise important questions (both of the evaluators and of community members), and to identify concerns that might block the process or the use of its results. Given the evolving nature of communities and the emergent crises they continue to face, teaching community members may be a viable and cost-effective way to sustain a long-term commitment to evaluation in an organization or a community. However, it is important to note that, in my experience, few evaluation contracts would support such activities, and, absent such support, community members may not be able to take on a potentially time-consuming role.

Addressing these four activities—remembering to be humble, developing relationships intentionally, structuring interactions purposefully, and fostering diverse participant roles—should allow evaluators to develop or refine the interpersonal competencies that can make or break an evaluation study.

### *The Possibility of Evaluation Capacity Building (ECB)*

Knowledge, skills, and abilities related to interpersonal interactions may also support evaluation capacity building. The concept of “free range evaluation”—an approach that lives naturally in organizations and is strengthened because it must survive ongoing challenges to its existence (King, 1998)—suggests the potential power of building on and systematizing the innate evaluation processes that exist in organizations and communities. If evaluators are in a collaborative role and working in partnership with program staff,

they might use their interpersonal skills to support the development of such capacity.

Evaluation capacity allows communities to pay ongoing attention to events and to manage change as it is occurring. As Cousins, Goh, Elliott, and Bourgeois (2014) detailed, this includes the ability both to do and to use evaluation. It could ultimately create a system of integrated developmental evaluation (Patton, 2011) that would perhaps lead to a more efficient use of resources, along with the potential for programmatic sustainability and self-sufficiency. There is an obvious risk, of course, in that people who lack sufficient technical skills may make mistakes, e.g., using data generated from poor survey items or creating inappropriate purposive samples. This is where an evaluator with preexisting relationships and skilled at personal interactions in the setting could play a vital role by providing technical support and teaching community participants. Resources to support the pairing of an evaluation liaison with an embedded evaluator may provide a viable structure for ECB.

### What about Evaluator Training—and Education?

An evaluator’s “toolkit” needs to include multiple skill sets, but in my opinion it surely requires interpersonal competencies for appropriate use in different roles and in different contexts. Compare, for example, external evaluators conducting multimillion-dollar policy outcome studies for a national government versus internal evaluators leading an underfunded implementation evaluation for a small non-profit somewhere. The interpersonal skills required may be different and may require a team effort, but in both cases they remain essential for feasibility, i.e., framing a study and collecting data at all, and for accuracy, i.e., ensuring that the data gathered are accurate and useful. In every case there is no guarantee that a more sustainable system of evaluation may develop owing to people’s engagement with the evaluation process, but over time and with sustained engagement, one can hope for such an outcome.

Actually requiring evaluators to demonstrate multiple interpersonal skills—an interesting thought experiment given the field’s current lack of licensure—would most likely necessitate a restructuring of evaluator training and education. I expect that a focus on teaching interpersonal competencies would require significant changes in many university-based evaluator education programs and the expansion of non-university professional development sessions.

Two things seem clear to me. First, while methodological training is surely necessary, it is certainly not sufficient for preparing evaluators in the future. University professors who are grounded in disciplinary research, who have never participated in an evaluation, and who may not even know that the field of evaluation exists are unlikely to be able to teach the interpersonal KSAs that I believe are needed. It seems to me, then, that universities may not be the best venue for instruction in interpersonal skills; some form of field-based experience will probably be required, but it is not clear what a viable format for that might be. One can imagine options like high-quality, validated trainings sponsored by professional associations or formal internships and apprenticeships with vetted practicing professionals. Purposefully placing students in unfamiliar settings by paying close attention to contextual details (e.g., culture, organizational type and size, location) might heighten their experience and eventual gains. Learning from the experiences of other professions that require effective interpersonal interactions (e.g., clinical psychology, medicine, and social work) may be a way to start, but evaluator educators need to tackle this issue systematically if the field is to make progress in this area.

Second, a related issue that demands immediate attention relates to the question of how to meaningfully measure an evaluator's interpersonal skills before, during, and after instruction. If we are unable to determine and document an evaluator's ability to interact effectively—and provide remediation if needed—then in some sense it seems unfair to require these skills. But the multiple challenges of measuring interpersonal expertise in the variety of contexts and cultures in which evaluation takes place seem daunting, especially given the current state of evaluator education and because funding to support this research may be difficult to find. This is a task for the future that we cannot ignore if we are serious about successfully educating future evaluators in these critical competencies.

This paper first traced the development of competencies for professional evaluators and identified interpersonal competencies as a key component of evaluator education in the future. It then outlined two roles for evaluators that may affect the application of interpersonal competencies, discussed four ideas for their development, and briefly addressed the possibility of evaluation capacity building. It ended with the question of where and how evaluator training or education might effectively teach these

competencies and know that people had learned them.

In conclusion, it is clear that the global pandemic highlighted the necessary evolution of interpersonal skills. How did evaluation practice change when people could not interact face to face? Cell phones enabled new forms of personal exchanges. Interaction during Zoom meetings unavoidably differed from in-person sessions. When people did come together, wearing masks sometimes made it awkward and challenging to understand their ideas. And yet, despite the changed nature of interactions, evaluators still needed to frame studies, collect data, and prepare findings. Their interpersonal skills had to adapt to the new reality, and adapt they did. It strikes me that an appropriate next step in the continuing evolution of these skills would be to come together as a global community of evaluators and evaluator educators to begin a long-term conversation about how to proceed with developing these competencies and a routine process to adapt and use them in specific contexts.

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Table 1. The Interpersonal Competencies (Domain 5) of the 2018 AEA Evaluator Competencies

The competent evaluator ...	
5.1	Fosters positive relationships for professional practice and evaluation use.
5.2	Listens to understand and engage different perspectives.
5.3	Facilitates shared decision making for evaluation.
5.4	Builds trust throughout the evaluation.
5.5	Attends to the ways power and privilege affect evaluation practice.
5.6	Communicates in meaningful ways that enhance the effectiveness of the evaluation.
5.7	Facilitates constructive and culturally responsive interaction throughout the evaluation.
5.8	Manages conflicts constructively.

Table 2. The Interpersonal Competencies (Domain 5) of the 2018 AEA Evaluator Competencies Compared to the Principles of Interactive Evaluation Practice

The competent evaluator ...		Respect culture	Take time	Get personal	Structure interaction	Consider politics	Expect conflict	Examine context
5.1	Fosters positive relationships for professional practice and evaluation use.	X	X	X	X			
5.2	Listens to understand and engage different perspectives.	X	X	X		X		
5.3	Facilitates shared decision making for evaluation.	X	X	X	X	X		
5.4	Builds trust throughout the evaluation.	X	X	X				
5.5	Attends to the ways power and privilege affect evaluation practice.	X			X	X		
5.6	Communicates in meaningful ways that enhance the effectiveness of the evaluation.	X	X	X	X			
5.7	Facilitates constructive and culturally responsive interaction throughout the evaluation.	X	X	X	X			
5.8	Manages conflicts constructively.	X	X		X	X	X	

Table 3. The Context Competencies (Domain 3) of the 2018 AEA Evaluator Competencies

The competent evaluator ...	
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.
3.4	Attends to systems issues within the context.
3.5	Communicates evaluation processes and results in timely, appropriate, and effective ways.
3.6	Facilitates shared understanding of the program and its evaluation with stakeholders.
3.7	Clarifies diverse perspectives, stakeholder interests, and cultural assumptions.
3.8	Promotes evaluation use and influence in context.