Glocal Evaluation Competencies for Learning as We Go: Zooming In and Zooming Out to Connect Systems-Level Solutions to Local Beneficiaries

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Background: Authors provide practical examples of how to apply competencies to real-time learning in complex environments to support learning and adaptation to improve the lives of those most impacted by inequitable and unsustainable global systems. This paper was initially conceptualized to support evaluation competencies training for a country-level-public sector evaluation capacity building effort.

Purpose: To enhance understanding of the evaluation competencies required to integrate across local and global levels.

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Findings: Not applicable.

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Unprecedented events in our collective lived experiences have been taking place in the past few years, highlighting the interconnected nature of global events and our local communities. The global COVID-19 pandemic has revealed the significant local implications of our global health system and its shortcomings. Russia's invasion of Ukraine is brutally showing us that genocide is still possible and has ramifications throughout the world, including at local levels. The news that unmarked graves of Indigenous children, who were taken to Indian residential schools in North America and never returned, shocked the consciousnesses of many who had never faced the truth of what took place when violence was committed against children, families, and communities on their own ancestral land. These and other crises highlight the importance of connecting local and global perspectives in the conduct of all evaluations. Doing so, we shall affirm, is an essential evaluation competency.

Identifying essential competencies for evaluators has received significant attention in recent years. Yet, as three seasoned evaluators, we find that practical examples of how to apply competencies to real-time learning in complex environments are lacking. In particular, we have seen how the experiences of those at the local level—ultimate beneficiary individuals (UBIs)—can get lost when evaluations take a systems perspective. In this article, we use our more than six decades of combined experiences to support learning and adaptation to improve the lives of those most impacted by inequitable and unsustainable global systems.

We call our approach Learning as We Go. Kuji-Shikatani, lead author, has used the term "learning as we go" to describe utilization-focused developmental evaluation since the mid-2000s, to embed evaluative thinking and to help build capacity in public-sector programs that she supports as an internal evaluator (Kuji-Shikatani et al., 2016). As an internal evaluator in the public sector, her work involves learning focused on the value-based principles (Lessard, 2018) that guide the work and providing the best advice to public servants to enable the system to best serve the people and keep them safe and thriving. Before examining specific global competencies for evaluation, we present the overarching perspectives that inform our conceptualization and professional practice of Learning as We Go.

Guiding Principles for Learning as We Go

Our perspectives about glocal evaluation competencies evolved from the evaluation competencies adopted by evaluation professional associations and are grounded in three overarching perspectives illustrated in Figure 1: (1) utilization-focused developmental evaluation, (2) evaluative thinking, and (3) the glocal principle of Blue Marble Evaluation.

Figure 1. Overarching Principles for Learning as We Go

Utilization-Focused Evaluation

Learning as We Go is utilization-focused, which means that it should always be done with ongoing attention to how the information gathered will be used to support learning and adaptation (Patton & Campbell-Patton, 2021). Coauthor Campbell-Patton is also coauthor of the new fifth edition of *Utilization-Focused Evaluation*, which emphasizes that all evaluations should address issues of sustainability and equity. Coauthor Wendy Rowe, as a practitioner of developmental evaluation and professor in leadership studies, has a long history of practice and scholarship in which evaluative inquiry serves goals of change and improvement for the program and/or organization.

Evaluative Thinking

Evaluative thinking is systematic, intentional, and ongoing attention to expected results, focusing on how results are achieved, what evidence is needed to inform future actions, and how to improve future results (Patton, 2013). Evaluative thinking is foundational to Learning as We Go because it guides how we carefully and systematically consider options and access appropriate evidence to learn new ways of thinking that inform decisions. This means we ask evaluative questions, engage in dialogue, apply evaluation logic, gather and report evaluative data, and integrate learnings to inform and support the development of innovative projects, programs, initiatives, products, organizations, and/or systems change with timely feedback (Patton, 2010).
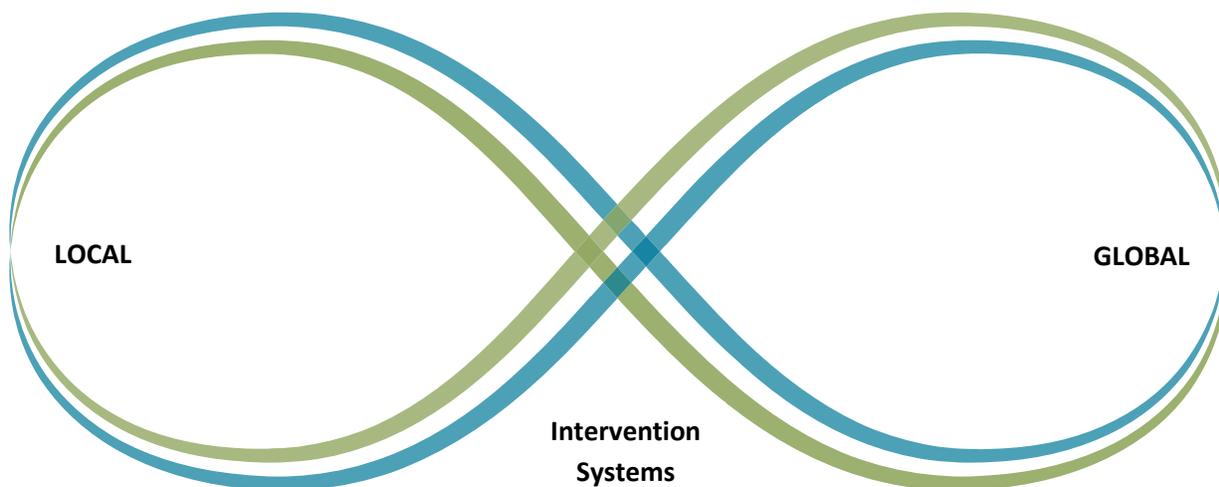
Consider how we all looked for reliable information to decide how to keep our loved ones and ourselves safe in the pandemic, while also dealing with other pressing issues such as homelessness and education access for our children. That is an example of evaluative thinking based on

> critical thinking applied in the context of evaluation, motivated by an attitude of inquisitiveness and a belief in the value of evidence, that involves identifying assumptions, posing thoughtful questions, pursuing deeper understanding through reflection and perspective taking, and informing decisions in preparation for action. (Buckley et al., 2015, p. 378)

The Glocal Principle

"Glocal" refers to the connections between global and local, as shown in Figure 2. The glocal principle of Blue Marble Evaluation (Patton, 2020) spotlights the competency of understanding and considering the interconnections between the local community level, the intervention systems that affect local communities, and global systems.

Figure 2. Glocal Perspective

LOCAL   **GLOBAL**

Intervention Systems

- Local level: closest to the ultimate beneficiary individuals (UBIs) in communities.
- Intervention systems level: configuration of actors involved in change efforts (interventions), connected by a web of relationships towards a common purpose (e.g., various levels of governments).
- Global level: system of systems interacting across borders and boundaries (e.g., international partnerships, organizations, etc.).

Given the importance of working across local, systems, and global levels, we will walk through how evaluators can support social innovators and others engaged in social change to make local-to-global connections and evaluate the extent to which this work is making lives better. As the world has become more complex and interdependent, Learning as We Go requires that we zoom in to the local level and out to the global level, keeping in mind the systems impacting individuals across these levels. In Blue Marble Evaluation, Patton (2018) refers to this as the "Glocal principle." We define glocally competent evaluators as evaluators who integrate evaluative thinking across levels to support a focus on the ultimate beneficiary individuals without losing sight of the impact of the systems and the global context in which they live. In the following section, we will explore what overarching competencies are required to implement the glocal principle while learning as we go.

Learning as an Action and an Outcome

All three principles recognize the importance of learning processes and knowledge outcomes. Learning is not a static activity or accumulation of knowledge but a dynamic process that occurs through action, gathering of information, and altered perspectives among stakeholders, as articulated through such theories as action learning (Zuber-Skerritt, 2011), triple loop learning (Swieringa & Wierdsma, 1992), and transformational learning (Simsek, 2012).

Zuber-Skerritt (2011) emphasizes processes of questioning, listening, thinking creatively, and solving problems, which yield new perspectives and understanding when employed by groups of people through iterative cycles of planning, inquiry, reflection, and evaluation. As questions are asked and assumptions tested, action learning yields new understandings or reframing of the problem, as well as generation of solutions. As solutions are implemented, additional cycles of learning and

evaluative inquiry are activated across groups of people to generate new knowledge and action.

In their seminal writings, Hallie Preskill and Rosalie Torres (1999) argue that learning processes of dialogue, reflection, asking questions, and identifying values and beliefs are at the heart of evaluative inquiry, which leads to new or altered knowledge for an organization or program. "Learning occurs through the social construction of knowledge and can be transformative when stakeholders are able to alter their perceptions and understandings of the evaluand" (p. 40). Further, these authors were among the first to recognize that context mattered in how learning occurred, how it was focused, and how it influenced decision-making. The needs of the organization or the constituents (i.e., the ultimate beneficiaries) influence the types of learning processes that are utilized as well as the outcomes of these processes.

In the context of an organization or program, evaluative thinking might yield single, double, or triple loop learning (Swieringa & Wierdsma, 1992, based on concepts articulated by Argyris & Schön, 1978). Single loop learning is simple knowledge about the performance or operation of an entity, leading to small tweaks or adjustments to methods or operations. In double loop learning, new knowledge is gained that requires adaptation and adjustment of methods and strategies, but the overall purpose and direction remain the same. In triple loop learning, existing knowledge, values, and assumptions are challenged through inquiry and dialogue, leading to reframing of the issues, transformation of mind among the stakeholders, and a reformulation of interventions or solutions. With this transformation in worldviews comes significant change in direction and action. Scholars often also refer to this process as transformational learning (Simsek, 2012):

> Transformational learning is the process of deep, constructive, and meaningful learning that goes beyond simple knowledge acquisition and supports critical ways in which learners consciously make meaning.... It is the kind of learning that results in a fundamental change in our worldview as a consequence of shifting from mindless or unquestioning acceptance of available information to reflective and conscious learning experiences. (p. 3341)

In Learning as We Go, where the focus of evaluative inquiry differs across contexts (local, systems, and global), learning processes will involve different groups of people, different types of questions, and different processes of dialogue and

reflection; as a consequence, they will yield different understandings and knowledge.

In summary, Learning as We Go involves a variety of learning processes at the local, systems, and global levels of stakeholders that change perspectives and generate new knowledge, guided by three overarching principles and frameworks: (1) utilization-focused evaluation, (2) evaluative thinking, and (3) the "glocal principle" of Blue Marble Evaluation. Evaluators can determine how they can develop their glocal evaluation competencies based on the foundational evaluation competencies they are familiar with (as set forth by a voluntary organization for professional evaluation, or VOPE). We turn now to specific operating principles for glocal evaluation competencies, using *Competencies for Canadian Evaluation Practice* (CCEP) as an example.

Glocal Evaluation Competencies

The glocal evaluation competencies for Learning as We Go are rooted within the foundational evaluation competencies articulated by several voluntary organizations for professional evaluation (VOPEs) around the world. [1] We will use the Canadian Evaluation Society's (CES's) *Competencies for Canadian Evaluation Practice* (CCEP; 2018) to discuss the glocal evaluation competencies. This document provides a suite of competencies—"the knowledge, skills and dispositions [program evaluators] will need for successful evaluation practice" (Stevahn et al., 2005, p. 45)—for evaluation work in Canada. Kuji-Shikatani and Rowe are familiar with this framework as CES Credentialing Board members.

The current, updated version of the CCEP include 36 competencies in five domains:

* Reflective Practice competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.
* Technical Practice competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
* Situational Practice competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.
* Management Practice competencies focus on applying sound project management skills throughout the evaluation project.
* Interpersonal Practice competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders. (CES, 2018, pp. 6–7)

In the sections below, we examine how evaluators can develop their glocal competencies as an extension of foundational evaluator competencies as articulated in frameworks such as the CCEP.

With the overarching framework for Learning as We Go established, we now turn to elucidation of glocal competencies as presented in Figure 3.

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[1] The American Evaluation Association endorsed a statement on cultural competence in evaluation in 2011 and a framework of general evaluator competencies in 2018. Other VOPEs have developed lists of competencies based on their contexts (ANZEA, 2011; SAMEA, 2020). The UN Evaluation Group (UNEG) has published competency frameworks for both evaluators and commissioners of evaluation.

Figure 3. Glocal Competencies for Learning as We Go

| 1.Glocal Reflective Practice |
| 2. Glocal Technical Practice |
| 3. Glocal Situational Practice |
| 4. Glocal Management Practice |
| 5. Glocal Interpersonal Practice |

Glocal Reflective Practice

Within the realm of reflective practice, developing a strong sense of self-awareness (CCEP 1.7) is a critical starting place for the glocally competent evaluator. Gullickson and Hannun (2019) suggest that evaluators need to know their own value system to practice authentically and in congruence with the values underlying the program and the values implicit in the evaluation processes. This requires evaluators to demonstrate self-leadership by being attuned to who they are, including their biases and limitations, and sensitive to cultural context and diverse peoples, in addition to acknowledging the competencies they bring to the evaluation endeavor (Daud, 2020).

Further, how evaluators engage with others is shaped by their paradigm for viewing the world. Bolman and Deal (2017) describe four worldviews: mechanistic, relational, political, and symbolic. In a mechanistic worldview, the UBIs of program interventions are given no more importance than other elements of the program; the effectiveness of a program is defined by the achievement of measurable objectives, regardless of how they were valued by or significant to the individual program participants. In a political worldview, evaluators consider only the vested interest of the political stakeholders and what they see accomplished or accounted for through the program intervention. In

a relational view of the world, the lived experiences of the UBIs matter and are given greater attention than the scores achieved on a measurement tool. In a relational worldview, the evaluator seeks to build respectful and caring relationships with the UBIs as the starting point in a process of evaluation. In a symbolic worldview, evaluators are sensitive to the spiritual values and existential perspectives that permeate the program purpose and the experience of participants.

Learning as We Go evaluation is oriented to the needs and lived experiences of the UBIs; it is relational and intensely personal for both the evaluator and the individuals who are directly receiving services. In this context, the evaluator identifies with personal values of inclusion and equity and consequently engages in practices that influence the questions they ask, the processes they adopt, and the way they interpret findings.

While CCEP 1.5 calls us to provide "an independent and balanced perspective in all aspects of the evaluation," we acknowledge that evaluators, like everyone, are influenced by prior conditioning and socialization—what they already know and what they have experienced. Whether working at the local level close to UBIs, at the level of systems or government, or at a global level, we must start with an awareness that we all have skin in the game. This requires a shift from evaluators as independent to interdependent. Glocally

competent evaluators recognize and consider how various influences are impacting our evaluation work. This recognition feeds into the next competency, transparency (CCEP 1.6). The glocally competent evaluator must be transparent, not just about evaluation methods and data, but also about how they see the world, what values they bring to the work, their personal stake in the intervention, and the implications of that view for engagement as an evaluator. As CCEP 1.7 reminds us, self-awareness is a journey, not a destination. The glocally competent evaluator continues to reflect on how their personal values relate to the evaluation and remain open to emergent learning opportunities.

With self-awareness and personal learning as a starting place, we can move into looking outward to how our personal values intersect with the wider world. CCEP 1.4 calls us to "consider the well-being of human and natural systems in evaluation practice." A glocally competent evaluator must balance attention between individual benefits and systems-level benefits to an intervention. This requires consideration of how every evaluation can promote equity and sustainability without losing the direct connection back to the UBI. The glocally competent evaluator needs to balance a deep understanding of how their own experiences have shaped their perspectives with global thinking (Osland et al., 2012) as systemic and critical observers of the whole system (Senge et al., 2015).

Finally, CCEP 1.8 encourages us to engage in professional networks and activities and contribute to the evaluation profession and its community of practice, which includes both local VOPEs and global networks like Blue Marble Evaluation and EvalPartners, to sustain and support both the global evaluation profession and our own learning and growth.

Altogether, in the Reflective Practice domain, the glocally competent evaluator will balance looking inward and looking outward, generating an awareness of their own perspectives and how they influence their evaluation practice while also looking at the broader systems and their impact on the ultimate beneficiary individuals (UBIs). Building self-awareness is an ongoing practice, not a one-time event that we can check off as complete. It is important for all evaluators to build into their work the time and space for ongoing learning and reflection. This becomes even more critical for evaluators working to transform their evaluation practice to integrate across local, systems, and global levels.

Glocal Technical Practice

In the domain of technical practice, the glocally competent evaluator needs to be able to clarify an evaluation's scope and purpose (CCEP 2.1), but also to adapt it as situations change and new information emerges, integrating the Technical Practice domain with the Situational Practice domain (see the following section).

At the local level, we begin by facilitating the articulation of a clear vision for where we want to be and how we will get there (i.e., a program theory, as CCEP 2.3 puts it). Programs require investments, and it is important that the changes that the program is designed to bring about be plausible (Knowlton & Phillips, 2013). Staff working in the community closest to the UBIs tend to be most attuned to what is most beneficial to the UBIs. This requires listening and dialogue. When asked how the individuals are doing, these staff can often tell stories that clarify what is happening on the ground. The evaluator's role is to help systematize the gathering of these stories through the application of appropriate methods (CCEP 2.6) and help put them in global context by applying systems and complexity theory to understand systems change beyond the program/project level.

Identifying data requirements, sources, sampling, and tools (CCEP 2.7) and collecting, analyzing, and interpretating data (CCEP 2.8) must all be done with attention to the connection between local perspectives and global trends. The glocally competent evaluator works across traditional sector silos to identify possible data sources that accurately capture what happens for the UBIs and how policies and programs may (or may not) be contributing to improving their lives. Often this requires transformation learning; that is, adopting new perspectives and understandings and new strategies to change lives. The further removed the evaluator is from the UBIs, the more challenging it becomes to connect system-level changes to local-level outcomes. Using our technical competencies, evaluators will need to support the development of systems that will facilitate tracking and documenting the implementation and help make these connections.

Evaluators support the use of findings (CCEP 2.9) through feedback that is developmental, ongoing, timely, emergent, and interpersonal. We facilitate, document, surface issues, collaboratively inquire, and support active learning from processes and outcomes as we go to inform the ongoing adaptive, innovative processes. Evaluators also provide accountability for those who invest in the program (e.g., funders, organizations, systems), as

well as provide continuity of services for the individuals when the knowledgeable frontline staff are not available or any program changes occur. Evaluators have a duty not just to produce complete and balanced evaluation reporting to support decision-making and learning (CCEP 2.10), but to see and engage with different perspectives, integrating divisions, transcending boundaries, and overcoming polarities in evaluation reporting.

When processes and structures are put into place to track and document the ongoing process and outcomes, issues are more likely to surface—and be understood and addressed—in a timely manner; these processes and structures also make it possible to examine groups of cases where a certain approach might better contribute to *getting to where we want to be.* The trusting relationships that are built within the multiple layers of the system (Interpersonal domain) help policy makers / program managers identify barriers, learn to better understand various perspectives and promising approaches/principles, and explore solutions/adaptations to address what needs to be changed on the ground closest to the UBIs.

Finally, the glocally competent evaluator needs to innovate to evaluate the transformation that is taking place. It is important to pay attention to how evaluators are using new technologies and approaches, such as big data, artificial intelligence (AI), remote sensing, geographic information systems (GIS), robotics, animation, and blockchain technology, and to use methodologies that are meaningful and useful for the social innovators (Hassnain et al., 2021).

Altogether, in the Technical Practice domain, the glocally competent evaluator will be able to adapt evaluation purpose and scope as the situation changes, frame (or reframe) evaluation topics and questions with a glocal perspective to reveal patterns across silos, and connect local to global patterns.

Glocal Situational Practice

As noted previously, it is critical to engage in ongoing situational analysis to ensure that the methods adopted under the Technical Practice domain match the context. CCEP 3.1 calls us to "examine and respond to the multiple human and natural contexts within which the program is embedded." Zooming in to the local context and out to the global context, as well as across system silos, is a critical role of the glocally competent evaluator. Changing one's perspective from local to systems and global levels is both a cognitive and a learning

activity and is best accomplished through asking questions and dialoguing with others.

While a deep understanding of the experience of the UBI should always be at the core, as a situation becomes more multifaceted and complex, so does the process to understand it and learn as we go. Systems such as governments and large not-for-profit organizations have multiple layers (e.g., headquarters, government ministries/departments such as ministry of health/education/labor/environment, etc.) with varying types of responsibility to enable those working on the ground in multiple locations. Initiatives may be funded through various sources (e.g., permanent funding based on population or any other criteria; special funding, often related to the government's mandate; etc.) and adjustments may need to be made to the program system so individuals in different locations can *get to where they want to be.*

Bob Williams, a leader in evaluation systems thinking, sums up systems thinking with three main activities:

- Understanding inter-relationships
- Engaging with multiple perspectives
- Reflecting on boundary choices (2014)

When reflecting on the first thing an evaluator should do when trying to think more systemically, Williams offers this advice:

> Treat the systems and complexity field with the respect it deserves. It's a big field and like the evaluation field has diverse methods and methodologies, big unresolved disputes and a history. Do your homework and avoid grabbing hold of simple clichés. (2014)

Glocal evaluators need to also have the capacity to see what is happening in the system from the eyes of the diverse stakeholders, building relationships with stakeholders through listening and collaborative dialogue (CCEP 3.2 and 3.3). This requires a systems-thinking orientation that is open and adaptive. Senge (2015) suggests that systems leaders are not all-knowing but rather exercise the "strength of ignorance which gives them permission to ask obvious questions and to embody an openness and commitment to their own ongoing learning and growth that eventually infuse larger change efforts" (p. 28).

There may be multiple accountability relationships and/or other networks/systems complexities (e.g., multilevel governments such as municipal, provincial/state, federal) that may

support other aspects of the beneficiaries through a similar multilevel system (e.g., not-for-profits, etc.). Situation analysis needs to be ongoing as new information arises or new phenomena occur. As complicated layers of systems emerge out of the desire to serve the UBIs, it is important that the systems-level evaluation begin with an understanding of the system actors or stakeholders, paying attention to relationships across levels while also working at the local level closest to the beneficiaries. Through ongoing situation analysis, the glocally competent evaluator ensures that an ongoing zooming in to the experiences of those most impacted (UBIs) and a zooming out to the systems and global levels takes place.

Evaluators can support the process of Learning as We Go by building and maintaining trusting relationships (CCEP 3.3) through a process of cocreation and ongoing engagement. Social innovators working in complex environments need access to information to be able to innovate and adapt in real time. Sharing evidence within and across systems is important to ensure that information is not siloed, no matter where it is generated from within the system.

The glocally competent evaluator should also cultivate an ability to identify and respond to changes in the context of the program (CCEP 3.5), as well as to changes in the broader context in which the program is operating. This requires the ability to map global system interconnections and the relationships of specific projects, programs, and communities within and across local and global contexts. The willingness to lean into ambiguity often feels contrary to evaluation training that focuses on what we can measure and what we know for certain. However, in the process of Learning as We Go, it is just as important to recognize what we don't or can't know. This is where the learning really begins.

To "promote and facilitate the usefulness of the evaluation process and results" (CCEP 3.4), evaluators need to help leaders and other stakeholders to understand the larger system and all its dynamic parts. This means sharing information across the network, facilitating program theory development, and bringing stakeholders together in dialogue to understand their role in support of the program as funders, policy makers, agency managers, collaborative service providers, and allies of the UBIs. Glocal evaluators support Learning as We Go by documenting and sharing timely and relevant information on the progress and shifts in the program and how they impact UBIs and the system—zooming in and zooming out. When

evaluators understand the different interests and needs of the system stakeholders (CCEP 3.2), they can tailor the flow and nature of information. In this way, evaluators legitimize the different stakeholders in the system and facilitate a strengthening of their contributions. The evaluator is engaged in a mutually reciprocal process of communication and leadership action; other stakeholders have additional leadership responsibilities that require the cooperation and assistance of the evaluator. This interactive communication process is likely to lead to double and triple loop learning that yields new knowledge and innovative solutions.

Glocal Management Practice

The primary focus of the evaluation management competencies in CCEP and other frameworks is on project management. Within this realm, however, we find evaluation *leadership* to be one of the most important areas for glocal evaluators to support learning. Evaluation leadership requires that evaluators stay informed and seek new information to continually reassess what is happening in the immediate context as well as the larger context. While evaluators do this for themselves, as they must anticipate events that can affect their own perceptions and reactions, they must also do it to inform organizational stakeholders and leaders on any events that are interfering with the progress or efficacy of a program. Evaluators are barometers and advance pilots, providing information and facilitating processes that activate and support the decision-making and action of the program leaders.

Evaluators who wish to establish a Learning as We Go practice need to build a shared leadership team with program or organizational stakeholders. This form of leadership is often referred to as collective leadership (Cullen-Lester & Yammarino, 2016; Rowe et al., 2023). It involves respective parties coordinating and sharing mutually beneficial roles to attain overarching goals (De Brún & McAuliffe, 2020), equality of power (Campus et al., 2021), a network of relationships and roles for the exchange of information (Friedrich et al., 2009), and use of dialogic processes among all interested parties to make decisions (Raelin, 2018). Mattaini and Holtschneider (2017) speak to the importance of circle dialogic processes, common in Indigenous collective organizations, to expose divergent perspectives and ideas among individuals in an organization. Collective leadership emerges through this process.

Evaluator self-leadership capabilities serve to activate and engage the leadership responsibilities of the organizational leaders who manage, deliver, or establish policy related to the program. Beginning with the premise of starting from where they are, evaluators can facilitate or assist in a process of cocreation with organizational leaders to enhance the potential to serve the intended beneficiaries. An evaluative cocreation process is collaborative and based on inquiry activities with multiple interested parties through processes of questioning, listening, analyzing, feeding forward, taking action through multiple cycles of evaluative thinking, and program adjustment or improvements. The evaluator–organizational leader relationship is cooperative and learning focused, each party alternating between leadership and followership.

These evaluative environments are characteristics of collective leadership where roles of the evaluator, program decision makers, and other leaders overlap and evolve in a collaborative fashion to accomplish the goals of the program (Rowe et al., 2023). Illustrative of these dynamic and collaborative collective leadership environments are the program monitoring and feedback systems to learn what is working and not working. This is the joint responsibility of evaluators and program leaders—each party bringing different perspectives and inquiry skills, each party assuming responsibility for monitoring different aspects of the program and its UBIs, but all parties coming together to share, review, and decide collaboratively what new directions or changes are needed. Raelin (2017) speaks to the collective opportunity that arises from multiple individuals bringing different knowledge and perspectives to a systems-level perspective and awareness that then generates collective decision-making and transformational change.

Another role for the glocally competent evaluator working with others in the system is to "shift the collective focus from reactive problem-solving to cocreating the future for the program so that it might better serve the needs of the UBIs as well as other stakeholder in the system" (Senge et al., 2015, p. 29). Senge refers to this process as "artful leadership" and notes that it helps all members of the system to face unpleasant realities as well as participate in deeper aspirations. This is a process that requires trust-building and adaptive facilitation skills. Glocal evaluators need to facilitate ongoing collaborative inquiry and action as professional learning with the social innovators working in global networks, systems, and their programs, helping surface strengths and issues and enabling Learning as We Go to develop innovative approaches to complex problems.

Embedding evaluative thinking in programs requires leaders to walk the talk through "reality-testing, results-driven, learning-focused leadership" (Patton, 2013) and take on the responsibility to function as lead-learners (Katz & Dack, 2013). While programs may involve more people in different layers, both horizontal and multilevel, the change needs to happen on the ground. Without it, there will be no outcome, no impact, no transformation.

Glocal Interpersonal Domain

Within the Interpersonal domain, the focus in the CCEP is on "social and personal skills required to communicate and interact effectively with all stakeholders," skills that are indeed central for the glocally competent evaluator, who must use "a variety of processes that result in mutually negotiated agreements, shared understandings and consensus building" (CCEP 5.4), enabling Learning as We Go, zooming in and zooming out, balancing the need for both utility and complexity. This requires skills in observation and listening in order to build trust and communication so as to explore, ask questions, and engage in dialogue and reflection with stakeholders. Interpersonal skills are foundational to implementing learning processes.

The glocally competent evaluator cocreates evaluation in partnership (CCEP 5.5) with local and global stakeholders, establishing trusting relationships with decision makers at the highest government level as well as with the enablers who support the frontline staff working closest to the UBIs, in order to gain the knowledge held by any one of the multiple layers of the work involved (Taut, 2007).

The people who have interests in the program are likely to be in multiple locations, in multiple time zones, with varying experiences working with programs operating in different layers. It becomes more and more important to have a shared understanding of the needs being addressed and what you are hoping will change as a result. Articulating the journey, the journey's various paths, and the signposts along the way will require evaluators who can adapt verbal and nonverbal communication skills across contexts and cultures.

Ultimately, it is critical that the glocally competent evaluator support primary intended users to balance an understanding of how global and systems-level factors are influencing and influenced by the ultimate beneficiary individuals.

Cultural competency has been articulated in some evaluation competency frameworks, but not all. When working at the level of systems, cultural competency takes on new depth. In an exploration of systems approaches to cultural competency in the health care system, McCalman et al. write,

A systems approach to cultural competency integrates practices throughout the organization's management and clinical sub-systems, thus requiring an amalgamation of attitudes, practices, policies and structures to enable healthcare organizations and professionals to work effectively in culturally diverse situations. (2017, p. 2)

While this quotation refers specifically to the health care system, it holds true across systems, especially public sector systems. The culturally competent evaluator working at the systems level needs to develop skills in navigating a diversity of attitudes, practices, policies, and structures across a system and in understanding the opportunities and barriers to evaluation that stem from these cultural norms. Evaluation leadership may involve challenging certain systems-level practices that hinder evaluation use, but that begins with the ability to understand, identify, and navigate a diversity of systems-level practices.

Tying It All Together: Learning as We Go During COVID-19

When the pandemic began, most everyone in the world was trying to figure out what was going on and how they could get back to "normal." Most programs were trying to find as much information as possible about what was happening to their UBIs and how they were navigating the lockdowns, the loss of income, and all the changes to their former routines that made program implementation possible. What has emerged is a recognition that we are trying to move into a *new* normal.

Evaluators, like everyone, had to resist the urge to fall back on traditional ways of working, and instead to "adapt" and "reframe." Bolman and Deal's four frames for viewing the world (2017) may help one to recognize the shifts that may have occurred in oneself as a person and as an evaluator. The COVID-19 pandemic created conditions that forced evaluation practitioners to reflect on our own situation and practice to be able to then turn outward to understand how we could adapt to the changing situation of COVID-19. For some of us, this meant creating more intentional collaborative learning environments where we could simply

connect with fellow evaluators about what was happening. Balancing the need to slow down and understand the problem with the urgency to act was, and continues to be, a challenge for the glocally competent evaluator. Not letting perfection get in the way of action is important to Learning as We Go. Early in the pandemic, we found the most valuable role evaluators could play was as thought-partners—as those responsible for making decisions to zoom in and gather information about the local situation, but also zoom out to connect local impacts to global trends.

For example, social distancing and lockdowns were the only early lines of defense against COVID-19. To help us understand government responses around the world, we turned to the Stringency Index, which uses the mean score of the nine metrics: school closures; workplace closures; cancellation of public events; restrictions on public gatherings; closures of public transport; stay-at-home requirements; public information campaigns; restrictions on internal movements; and international travel controls (Oxford Coronavirus Government Response Tracker, 2022a).

As the pandemic continued, health policies were developed and global collaboration in vaccine development cumulated in the world finally having a more reliable defense against the most serious effects of COVID-19. With the vaccine came the Containment and Health Index, which "builds on the Stringency Index, using its nine indicators plus testing policy, the extent of contact tracing, requirements to wear face coverings, and policies around vaccine rollout" (Oxford Coronavirus Government Response Tracker, 2022b, para. 8).

In the second year of the pandemic, when the available defenses against COVID-19 expanded beyond the stringent measures to include vaccines and other therapeutics options, collaborative efforts ensued to provide vaccines in countries where the stringent measures could not work. Time was of the essence, and evaluators worked with global networks and systems to facilitate the learning that needed to take place to improve conditions for UBIs.

As glocal evaluators, we worked closely with programs and systems that had to pivot throughout the pandemic to facilitate understanding of how policies adopted by systems have real consequences for UBIs. We worked to help decision makers see the connections between the issues to avoid setting policies that were disconnected from the realities of those on the ground, as well as to avoid silos between sectors. For example, the Stringency Index had real implications for individual students and

families. Learning situations had to be created for a range of situations, from young children in kindergarten through students in post-secondary institutions, including those who needed accommodations or access to experiential learning placements as part of their diploma, certificate, degree and/or other designation. Workplaces could not simply close, as businesses and individuals need income to survive.

Educators from around the world shared what they had observed in the early stages of the pandemic and adjusted their practices accordingly (UNESCO et al., 2021; OECD, 2021). We heard from many colleagues in the Global South about how they supported schooling of vulnerable children (UNICEF, 2020). Our UBIs need this circle of support. Children and youth cannot focus on schooling when they are looking after younger ones while their families and caregivers work, or when they themselves are the ones working to put food on the table, or when they need medical attention. When we learn from those who are closest to the ground about how children and youth are challenged to focus on schooling, we quickly realize that we need to gain a systems-level view of the various issues impacting education rather than silo responses within one sector.

The 17 Sustainable Development Goals (SDGs) adopted by all United Nations member states in 2015 provide a shared blueprint for peace and prosperity for people and the planet, yet these goals are often siloed from one another. As glocal evaluators, we need to understand how these 17 goals intersect and help those closest to the UBIs see how their work is impacted by and impacts these global goals.

Having a shared understanding of the problem and the context surrounding it, we can begin to think about a shared vision for the future and the path to get there. For example, when there are a multitude of programs, systems, and organizations involved addressing various SDGs as well as mandates of governments and others who have an interest in making progress toward the SDGs, it is difficult for actors in different parts of the system to be cognizant of the interconnectedness of the multilayered work they are involved in. However diverse they are, they do share concerns for the UBIs and want to learn to get the UBIs to where they want to be. Any actions that are taken at the system level need to consider the social, political, geographic, and economic context, which is changing rapidly in the face of COVID-19, the climate crisis, and other global phenomena, with local and systemic implications. Social innovators and evaluators must continue to ask whether the changes taking place will directly or indirectly influence their work. They also need to clarify the processes they will use to continue to pay attention to contextual changes and adapt to them.

The pandemic showed us that even large systems can respond, learn to "pivot," and make changes to get to where they want to be to "keep people safe." In the context of a larger system that must respond to the complexity of a problem that continues to morph, evaluators must always remember that Learning as We Go will help facilitate changes in different parts of an organization and ultimately lead to the transformation that will help improve the lives of UBIs.

Conclusion

Throughout this article, we shared how glocal evaluators can facilitate Learning as We Go in support of ultimate beneficiary individuals across local, systems, and global levels. Learning to learn as we go will involve ongoing practice and hands-on experiential learning about how to zoom in and out to provide timely, meaningful, relevant, credible, and actionable evidence as evaluators in support of community and system transformation. Only when evaluators commit to this ongoing process of learning themselves can they make evaluation part of the solution, utilizing developmental evaluation as an intervention that informs innovative and adaptive development in complex realities.

Evaluation competencies support evaluation practice and evaluation leadership. Additional knowledge, skills, and dispositions are required of developmental evaluators working across local, systems, and global levels. These competencies are not learned in the classroom, but in the real world.

Using situational and interpersonal competencies allows evaluators to utilize their technical and management competencies effectively to support social innovators working at the systems level to focus on emerging issues. This requires gathering as much information as possible about why a problem exists at a systemic level and what impacts it is having at the local level. This context can be used to develop a preliminary plan, but that plan will need to be continually revised as the context changes or more information comes to light. An example is looking beyond the systemic issues of a worldwide public health crisis to understanding the pandemic's impact at the local level, gathering, by talking to people, information on the impacts of local interventions which, when brought back to the systems and global levels, offers innovations that are more beneficial than whole-system immunization or lockdown policies.

Evaluation practice across all levels begins with understanding the context in which the activities are taking place (where we are), then working to cocreate a shared vision (where we want to be) and how to get there. The interconnectedness of all parts of the system in which the evaluand is situated requires informed and careful analysis and consideration. An understanding of the relationships between and among those internal and external to a program—i.e., evaluand as part of a complex ecosystem—need to be considered, as decisions and actions in any one part affect the other parts, and the system as a whole is essential to the learning process.

Evaluation leadership requires knowing oneself and developing the skills to promote evaluation use across contexts. This means that we as evaluators need to be clear on our own values and lead with integrity and authenticity, speaking truth to power when warranted. Without a commitment to these values, the evaluator is simply a technical strategist providing data to meet funders' accountability requirements without regard for the question of whether the program is meeting the needs of the UBIs.

At any level, when the lives and circumstances of UBIs are not improved, that is a failure. The evaluator's role is to surface issues that affect the efforts—whether local, systems level, or global—to serve the UBIs and be part of the collaborative learning to find innovative solutions that will contribute to getting the UBIs where they want to be. *Evaluators speaking truth to power is critical, as not addressing issues that surface is not an option.* Evaluators need to be engaged in ongoing learning and evaluation capacity-building to generate a collective understanding of the urgency in addressing the emerging evidence.

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