In Plain Sight or Just Plain Obscured?: A Review of Professional Evaluation Associations' Frameworks for Evaluation Practice Supporting Equity, Diversity, and Inclusion (EDI)

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Background: With an increasing focus on integrating equity, diversity, and inclusion (EDI) in evaluation practice and products, there is an accompanying need to examine what structural supports exist that are provided by professional evaluation associations.

Purpose: This contribution systematically examines the frameworks for evaluation practice of six professional evaluation associations from Africa, Australia, Canada, Europe, New Zealand, and the United States to identify how evaluators can align integrating EDI in their evaluation practice to professional competency domains.

Setting: Not applicable.

Intervention: Not applicable.

Research Design: Comparative review of online content offered on professional evaluation associations' websites.

Data Collection and Analysis: Professional evaluation association websites were reviewed during April 2022 through to July of 2023. Content was downloaded into an Excel spreadsheet, and organized for review purposes by domains and subdomains.

Findings: The presentation of EDI content in evaluator competencies was found to be highly varied; variations were found in tone/theme, principles, and domains and subdomains. These variances have professional development implications for seasoned and emerging/student evaluators.

Keywords: competency/competencies; EDI; equity; diversity; inclusion; evaluation associations; domains/subdomains

This contribution addresses the question of how frameworks for evaluation practice might better serve evaluators, particularly emerging and student evaluators, in light of the issues of inequity, sustainability, and the inequalities that were recognized during the COVID-19 pandemic. I used review findings to situate the argument that while these structural dimensions provide a platform for integrating equity, diversity, and inclusion (EDI) in evaluation efforts and products, they simultaneously bind emerging evaluator struggles in their efforts to identify relevant tools and training. It could be argued that the EDI-related content presented in the examined frameworks for evaluation practice is not well aligned with training opportunities, tools, and supports that are most often sought out by emerging and student evaluators to further their evaluation professional development.

The concept of equity, diversity, and inclusion (EDI) is not new to evaluators. However, it has become an increasingly pressing issue with the murder of George Floyd by police, the advancement of the Black Lives Matter (BLM) movement, the discovery of unmarked graves of Indigenous children at the sites of residential schools, and the widely distributed inequalities noted as a result of the COVID-19 pandemic. There are roles for evaluators in the solution, including identifying how frameworks for evaluation practice not only support EDI awareness, but integrate EDI into all aspects of our evaluation practice. This is particularly important with the orientation of evaluation to align with social justice objectives (Bradley & Clark, 2022; Symonette et al., 2020). Whether or not evaluators support this transition, recent events ensure the continuity of this line of thinking for the next decade at a minimum.

Optimally, evaluation practitioners and academics want to prepare the next generation of emerging and student evaluators with opportunities to integrate EDI in their evaluation practice from the onset so that it becomes the norm rather than the exception. In response to a call for inquiries into evaluator competencies related to inequity by evaluation colleagues across the world, in this article I look at articulated frameworks for evaluation practice and specific content endorsed by professional evaluation associations as the foundation for evaluator efforts. It is important to acknowledge the work of King, Stevahn, Ghere, and Minnema (2001) for their taxonomy of evaluator competencies, which is reflected in most of the frameworks for evaluation practice reviewed here.

Methodology

This comparative review focused on systematically identifying and comparing professional associations' respective frameworks for evaluation practice. Review efforts were scoped to include: the African Evaluation Association (AfrEA); the American Evaluation Association (AEA); the Aotearoa New Zealand Evaluation Association (ANZEA); the Australian Evaluation Society (AES); the Canadian Evaluation Society (CES); and the European Evaluation Society (EES).

Five evaluation professional associations were included in the scope of the original review, and a sixth was added later. The evaluation professional associations were selected based on personal awareness, editor and reviewer insights, and a desire to cover a diversity of geographic locations. Review efforts were limited to evaluation professional associations sharing English content in their public-facing materials. Between April 2022 and July 2023, each evaluation association's website was reviewed to identify available and applicable content. Frameworks for evaluation practice were found that dated from 2011 through to 2020. I extracted information from these frameworks for evaluation practice into an Excel document, with the domains and subdomains identified by the organizations on separate lines. I reviewed the information, searching for EDI-related content, including specific words and phrasing, then synthesized summary findings.

Formal EDI frameworks were not used to frame review efforts; I made this decision intentionally based on the rationale that emerging and student evaluators may not be familiar with or have access to this content. Instead, I was guided by EDI terminology guidance forwarded by the Canadian federal government; this resource was developed by the Interdepartmental Terminology Committee on Equity, Diversity and Inclusion in 2021 (Government of Canada, 2021) as a response to the Clerk of the Privy Council's *Call to Action on Anti-Racism, Equity, and Inclusion in the Federal Public Service*. The objective of this resource is to broadly improve understanding of concepts related to equity, diversity, accessibility, and inclusion (Government of Canada, 2021). Over 120 key EDI terms are identified in these guidance materials. It is important to recognize that offered definitions are dynamic and will continue to evolve, and may have limited application beyond Canadian borders, but I believe the definitions offer an important point of departure. Definitions presented in this guide include:

Equity: The principle of considering people's unique experiences and differing situations, and ensuring they have access to the resources and opportunities that are necessary for them to attain just outcomes. (Government of Canada, 2022a)

Diversity: The variety of identities found within an organization, group or society. (Government of Canada, 2022c)

Inclusion: The practice of using proactive measures to create an environment where people feel welcomed, respected and valued, and to foster a sense of belonging and engagement. (Government of Canada, 2022b)

In addition, in the review, I elected not to use culturally responsive tools such as those Clark and Bradley (2022) used in their comparative analysis of EDI content in the competencies of the American Evaluation Association (AEA) and the Canadian Evaluation Society (CES). My rationale was that most evaluators would not be familiar with or have access to these tools.

These review efforts also did not include targeted or special EDI initiatives offered by evaluation professional associations. Such initiatives may include separate but related priorities, topical interest groups, special projects, and internships. I recognize that many of the associations reviewed may encompass several professional evaluation associations, each with its own unique framework for evaluation practice. This review also did not address transnational organizations with boundary-crossing evaluation units, such as the family of United Nations (UN), and World Bank organizations, or governments that have developed lists of evaluator competencies. Researchers wishing to broaden this exploratory effort may choose to do so by including evaluation professional associations that post materials reflecting diverse languages, as this scope was limited to professional evaluation associations that had posted content in English.

To frame these efforts, it is beneficial to acknowledge the challenge regarding a shared definition of "evaluator competencies"—a challenge first identified by King et al. in 2001. The author's explorations into evaluation competencies have highlighted the role that culture and context play in establishing evaluation competencies, and have fostered an improved understanding of what it means to be a competent evaluator. For the purposes of this article, evaluation competencies were defined to include the background, knowledge, skills, and dispositions program evaluators need to achieve standards that constitute sound evaluations (Canadian Evaluation Society, 2018). It is important to note that some of the professional evaluation associations use aligned terminology, but also use terms such as "capabilities" and "principles" to position how evaluation practice should be implemented within their respective jurisdictions. In this study, I used the term "domains" to distinguish evaluation practice areas (such as interpersonal relationships or methodological skills), and "subdomains" to refer to the specific item or task identified by the evaluation professional associations under each practice area. Finally, I defined "principles" as guiding rules—beliefs that set forth the expectations for individual behaviors.

Findings

In this section, in both narrative and tabular format, I offer a summary of EDI content relative to each of the professional evaluation associations' frameworks for evaluation practice. Considering the limitations of length identified for this article, I present only EDI findings that were explicitly identified. Not included is additional content which, depending upon personal interpretation, could have been potentially included as being related to EDI content. Full descriptions of those instances are available upon request. In the accompanying narrative, I discuss the implications of the findings. Presented in the following sections are the results of the review of each professional evaluation association, in alphabetical order. Each section presents a summary overview of the association's approach, highlights in tabular format where EDI is presented, and concludes with a more detailed narrative.

The African Evaluation Association (AfrEA)

The African Evaluation Association (AfrEA) has presented a resource that outlines a framework for evaluation practice in and for Africa. This framework is comprised of five key principles: powerful for Africans; technically robust; ethically sound; Africa-centric and yet open; and connected with the world. In total, there are 22 implementation principles that have been included in review efforts (summarized in Table 1).

Table 1. African Evaluation Association Guiding and Implementation Principles and Relevant EDI Content

Guiding principle	Implementation principle	Explicit EDI content
Powerful for Africa	P1. Conduct an appropriate, empowering process	Empowerment
Technically robust	T6. Be culturally responsive	Cultural responsivity
Ethically sound	E2. Protect the rights of people E3. Safeguard diversity and inclusion E4. Address inequalities and power asymmetries	Rights, diversity and inclusion, inequality and power asymmetries
Africa centric yet open	A3. Learn from the Global South, indigenous communities, and other contexts	Valuing of knowledge from non–Global North
Connected with the world	C3. Strive to contribute to the urgent need for durable and transformative change	Transformative change

Note. Text on principles adapted from *The African Evaluation Guidelines* [English draft version], by AfrEA, 2020 (https://afrea.org/aeg/AEG_ENGLISH.pdf).

What drew my attention first was the cross-cutting focus on the necessity of transformative and empowering change in Africa, and how evaluation is envisioned as one of the mechanisms that may support this change. This characteristic manifests across multiple implementation principles, which emphasize Africa and its connection to the world beyond its borders. Perhaps most significantly, there are three distinct EDI elements represented within the implementation principles in the "ethically sound" category. These three elements are grounded in human rights and democratic principles and emphasize safeguarding diversity and inclusion, and the related requirement to address inequalities and power asymmetries. Interestingly, for an evaluator/evaluation to be technically robust by AfrEA's consideration, the linkage is made to cultural responsiveness. Cumulatively, the integration of EDI in these principles leads to a vision in which evaluators and evaluation functions play a critical role in disassembling structures that have served to perpetuate historical systemic discriminations. It is equally important to note that neither the guiding, nor the implementation principles provide practical guidance on how these elements may be actualized. They consequently remain at a theoretical and conceptual level.

The American Evaluation Association (AEA)

The American Evaluation Association (AEA) views competencies as a common language and set of criteria to clarify what it means to be an evaluator. AEA positions for its membership five competency domains: professional practice, methodology, context, planning and management, and interpersonal. A total of 49 subdomains are aligned with these five domains. Academic offerings on AEA competencies specifically reference a distribution of EDI content across the five domains in support of social justice objectives (Clark & Bradley, 2022; Symonette et al., 2020). Symonette, Miller, and Barela cite their comfort level with the extent to which EDI flows across AEA's domains; note that "power, justice, privilege and equity" (2020, p. 121) are present in every element of evaluation practice; and urge evaluators to increase reflective practice as part of social justice goals. The results of my review (summarized in Table 2) align with these identified findings; dimensions of EDI are explicitly identified across all five domains and distributed fairly equally across all domains.

Table 2. American Evaluation Association Competency Domains, Subdomains, and Relevant EDI Content

Domain	Subdomain	Explicit EDI content
Professional Practice	1.1 Acts ethically through evaluation practice that demonstrates integrity and respects people from different cultural backgrounds and indigenous groups. 1.8 Identifies how evaluation practice can promote social justice and the public good.	Integrity and respect for people from different cultural backgrounds and Indigenous groups, social justice and public good
Methodology	2.10 Collects data using credible, feasible, and culturally appropriate procedures. 2.11 Analyzes data using credible, feasible, and culturally appropriate procedures.	Culturally appropriate procedures
Context	3.2 Engages a diverse range of users/stakeholders throughout the evaluation process. 3.7 Clarifies diverse perspectives, stakeholder interests, and cultural assumptions.	Diverse range of stakeholders, clarification of diverse stakeholder perspectives and cultural assumptions
Planning and Management	4.2 Addresses aspects of culture in planning and managing evaluations.	Addresses aspects of culture
Interpersonal	5.2 Listens to understand and engage different perspectives.	Understanding and engaging different perspectives

Note. Text on domains and subdomains adapted from *The 2018 Evaluator Competencies,* by AEA, 2018 (https://www.eval.org/Portals/0/Docs/AEA%20Evaluator%20Competencies.pdf).

When regarding AEA's Professional Practice domain from an EDI perspective, this content resonates loudly with human rights advocates. In order for an evaluator to be ethical in their professional practice, they must exhibit integrity and respect for people from different cultural backgrounds and Indigenous groups. Emphasized is the potential good that can stem from evaluation efforts for social justice and the common good. More problematic in this latter subdomain is the use of "can" and the difference between "can" and "should." While "can" is used", I argue that "should" would have been a better word choice. "Can" contains an element of capacity, or having the *ability* to provide explanations as to how evaluation practice can contribute to these goals. In short, using "can" implies a choice. But such contributions should be mandatory for evaluators, particularly when reflecting on social justice. Searches for definitions of social justice returned results identifying distribution of wealth, opportunities, and privileges within a society. This implies that inequitable distribution of these elements has occurred. These two subdomains also presume that evaluators are members in a functioning democratic society, which is a luxury not available to all in the evaluation profession. With divisive

politics frequently rearing at national levels, the differentiation between "can" and "should" becomes ever more important.

Relevant EDI content was also found in the Methodology domain, which reflects on culturally appropriate data collection and analysis. For those who may question how EDI manifests in planning and reporting, fear not—at least on the planning element. Under the Planning and Management domain, EDI content is presented in the subdomain related to aspects of culture. Unfortunately, the subdomain only identifies that the evaluator addresses aspects of culture. It does not elaborate on what is meant by addressing, or how it should be interpreted. Evaluation reporting is unfortunately not addressed from an EDI lens.

Potential EDI content is also presented under the Context and Interpersonal domains. Repeated references are made in related subdomains to diverse sets of stakeholders. I recognize that this could be interpreted to mean multiple evaluation stakeholders, such as management, commissioners, funders, third-party delivery organizations, experts, and other similar programs, but I have elected to interpret it to include program beneficiaries and program clients as well. I acknowledge that not all evaluators would hold the

same mindset. What supports this interpretation is an additional subdomain that notes that the evaluator clarifies diverse perspectives, stakeholder interests, and cultural assumptions. As a seasoned EDI and evaluation practitioner, I elect to proceed with the assumption that "diverse perspectives" is intended to refer to those people who have experienced barriers to the equitable distribution of the dimensions associated with social justice.

The Aotearoa New Zealand Evaluation Association (ANZEA)

The Aotearoa New Zealand Evaluation Association (ANZEA) gives specific elaborations on four competency domains: Contextual Analysis and Engagement, Systematic Evaluative Enquiry, Evaluation Project Management and Professional Evaluation Practice, and Reflective Practice and Professional Development. A total of 15 competencies are identified against the four detailed domains (see Table 3). Like many of the other evaluation professional associations, ANZEA's domains and competencies are supported by a set of evaluation standards, in this case specific to New Zealand. Each of the identified competencies is accompanied by more detailed information.

Table 3. Aotearoa New Zealand Evaluation Association Competency Domains, Subdomains, and Relevant EDI Content

Domain	Subdomain	Explicit EDI content
Contextual Analysis and Engagement	Demonstrated ability to: • identify, understand, articulate and take account of the wider context and situation relevant to the evaluation • provide as an individual evaluator, or form an evaluation team that has, both credibility in that context and the range of relevant connections/ relationships, knowledge, skills and experience • engage in respectful and mana-enhancing relationships • bring the contextual analysis and engagement together so that the evidence, analysis, synthesis and evaluative interpretation is credible and valid to the range of people (stakeholders) involved in and affected by the evaluation.	Context includes the connections between people, place and relationships Credibility in that context and range of relevant connections/ relationships Mana, mana-enhancing Context Range of people
Systematic Evaluative Enquiry	A demonstrated knowledge, skill and ability to: • report evaluation findings in a variety of ways that are credible, useful and actionable for the commissioner of the evaluation and others (stakeholders) who are involved in and affected by the evaluation, answers their questions, and is clear and transparent about methodological choices and evaluative interpretations made.	Others (stakeholders) who are involved in, and affected by the evaluation, answers their questions
Evaluation Project Management and Professional Evaluation Practice	A demonstrated ability to: • develop collaborative, co-operative and respectful relationships with those involved in and affected by the evaluation (stakeholders) and evaluation team members	Collaborative, cooperative and respectful relationships with those involved in and affected by the evaluation Standards and ethics

| | • subscribe to and apply the appropriate standards and ethics which inform professional evaluation practice in Aotearoa New Zealand. | |
| Reflective Practice and Professional Development | A demonstrated ability to:
• eflect on one's own identity, evaluation practice and expertise. | Identity |

Note. Text on domains and subdomains adapted from *2011 Evaluator Competencies,* by ANZEA, 2011 (https://anzea.org.nz/assets/Key-ANZEA-Files/110801_anzea_evaluator_competencies_final.pdf).

Perhaps what sets the ANZEA framework for evaluation practice aside from other professional evaluation associations is their intentional centering of values and cultural competency overtop the identified domains. While presented in ANZEA's competency domain Venn diagram as a domain (inferred by color-coding similar to the four domains identified), values and cultural competency appear to overlay each of these other four domains with accompanying related EDI content. With the attention provided at the front end of the ANZEA framework for evaluation practice document, it appears that values and cultural competence principles are meant to translate directly into each domain.

What it means to demonstrate cultural competence in the context of evaluation in New Zealand is elaborated, and four key responsibilities are articulated for evaluators. The intentional centering of values and cultural competency leads readers to the conclusion that these components are integral to evaluation practice in New Zealand, and should guide and inform efforts in the four competency domains. This unique approach varies from the approach adopted by other evaluation professional associations, despite efforts to integrate EDI across respective domains. In essence, the materials lead us to conclude that ANZEA sees EDI as central to evaluation practice, rather than as an add-on.

Other unique ANZEA approaches that are aligned with EDI were also identified. The inclusion of Māori language (which is the language of the Indigenous Māori people of New Zealand) is unique amongst other evaluation professional associations included in the scope of the review. Specifically, ANZEA identifies that

> Te Reo Māori (Māori language) has been used to describe particular ideas or concepts which are better or more fully expressed in Māori, however this is not intended to confine these particular ideas or concepts to Māori. They are inclusive of all people. (ANZEA, 2011, p. 12)

The description of the first domain, related to contextual analysis and engagement, emphasizes the connections: "people, place, and relationship: whakapapa (genealogy), whenua (land), mana me te whanaungatanga (relationship)" (ANZEA, 2011, p. 12).

"Mana," in particular, which is described as relating to authority, power, and prestige, is very relevant to EDI. In the related competency, reference is made to "respectful and mana-enhancing relationships" (p. 13). Conceptually, the relationships between evaluators and stakeholders are explicitly referenced in three of the four domains, and indirectly referenced in the domain dedicated to professional evaluation practice. This focus on the inclusion dimension of EDI resonates differently than EDI content presented by other evaluation professional associations and has the potential for application in other jurisdictions.

The Australian Evaluation Society (AES)

The Australian Evaluation Society's (AES's) competency framework draws on existing evaluator competency frameworks, using the best of these frameworks as well as AES expertise to meet the needs of their membership. What results is a framework with seven domains of competence: Evaluative Attitude and Professional Practice; Evaluation Theory; Culture, Stakeholders, and Context; Research Methods and Systematic Inquiry; Project Management; Interpersonal Skills; and Evaluation Activities. The presentation of the domain-related content makes it difficult to quantify exactly how many subdomains are identified. Explicit EDI-related content appears in most of the AES competency domains, with the exception of Research Methods and Systematic Inquiry. Exceptionally, AES's competency framework also has a domain dedicated to culture, stakeholders, and context. Review results are presented in Table 4.

Table 4. Australian Evaluation Society Competency Domains and Relevant EDI Content

Domain	Subdomain	Explicit EDI content
Evaluative Attitude and Professional Practice	Understands that even in groups that look or sound the same as the evaluation team, there will be cultural aspects that are different from the evaluators' own. Are sensitive to, respectful of, and compliant with cultural protocols and practice. Acknowledges and are transparent about their influence on the evaluation process, including value positions and cultural perspective.	Acknowledgment of difference, sensitivity, respect and compliance with cultural protocols and practice; and evaluator influence
Evaluation Theory	Brings together facts and values for reaching evaluative judgements.	Values
Culture, Stakeholders and Context	Identify and incorporate appropriate cultural protocols for interacting with the community, including incorporating cultural expertise on the evaluation team. Apply standards in a way that is sensitive to cultural context(s). Use culturally-appropriate methods for consultation, engagement, evaluation processes, and reporting. Seek dispensation for any departure of evaluation process from cultural norms (e.g. unable to communicate directly with cultural leaders, inability to follow cultural timeframes or procedures). Understand and articulate the potential and limitations of the evaluation within the cultural context(s). Identify relationships among stakeholder groups, and power relationships in particular. Articulate how those power relationships may influence specific evaluation processes or outcomes.	Cultural protocols including cultural expertise in the evaluation team, cultural adaption of standards, use of culturally appropriate methods throughout evaluation phases
Interpersonal Skills	Listen for and respects others' points of view. Have the capacity to build relationships with a range of people. Attend to issues of diversity and culture throughout all communication planning and processes. Listen to build confidence and effective representation amongst evaluation participants.	
Evaluation Activities	Select an evaluation team (including advisors) to cover the skills and knowledge necessary to perform the work, including culturally-knowledgeable members. Effectively engage identified and diverse stakeholders. Report on evaluation findings interpersonally and in culturally sensitive ways.	Culturally knowledgeable team members with evaluation skills and knowledge, diverse stakeholder engagement, and culturally sensitive reporting.

Note. Text on domains and subdomains adapted from *Evaluators' Professional Learning Competency Framework,* by AES, 2013 (https://www.aes.asn.au/evaluator-competencies).

Content produced by AES stood out, in part because of the comprehensiveness of the integration of EDI across domains, but also because of the domain set aside for culture, stakeholders, and context. The AES is the only professional evaluation association that has separately identified evaluative thinking and integrated dimensions of EDI in this domain as a precursor to all other domains. Further, relevant content also acknowledges the role (including power and privilege) held by evaluators to influence the evaluation process, value positions, and cultural perspectives. It is my judgment that EDI content is accessible to all levels of evaluators and hints at practical application.

As might be expected under a domain reflecting culture, stakeholders, and context, there is a robustness of related EDI content integrated across all evaluation phases, including planning, conduct, analysis, and reporting. This section references existing cultural protocols and standards and further identifies what evaluators can do in the event that they find themselves departing from existing cultural norms. A balanced perspective is reflected in subdomain content, which recognizes both the potential and limitations of the cultural context. Also identified under this domain heading is the requirement to identify power relationships amongst stakeholder groups, and how these power relationships may affect evaluation processes and outcomes.

Unsurprisingly, the interpersonal domain is also well represented with EDI content. This includes more obvious dimensions, including respecting others' points of view and having the capacity to build relationships with people, as well as attending to issues of diversity and culture throughout all communication planning and processes. The latter content was a bit surprising, given its focus on evaluation communications, although one could feasibly make the case that everything evaluators do is communication related and consequently should, in application, apply to any evaluation effort in its entirety. In a less obvious manner, I also interpreted the content related to listening to build confidence and effective representation amongst evaluation participants to be EDI-related. I relied on both "confidence" and "representation" as key words signaling empowerment and transformation. Less seasoned

EDI and evaluation practitioners may not interpret this similarly, given their evaluation education, experiences, position, influence, and training. It is also entirely possible that more social-justice-inclined younger and emerging evaluators may infuse building confidence and representation naturally into their evaluation practice, given their social justice orientation, without having to rely on their respective professional evaluation association's competencies.

Finally, under the Evaluation Activities domain, references to having culturally knowledgeable members of the evaluation team were found. Confusion, however, permeates the existing wording: "cover the skills and knowledge necessary to perform the work, including culturally-knowledgeable members" (p. 16). Does this mean that the evaluation team needs individuals who are culturally knowledgeable, or does it mean that the culturally knowledgeable team members must be evaluators? Again, my interpretation resides in my collective EDI and evaluation expertise, and I adhere to the tenet of "nothing for us, without us." This means that I ultimately choose to interpret this statement as meaning that a culturally knowledgeable individual, even without evaluation skills, belongs on the team. Culturally sensitive reporting is also introduced under the evaluation activities domain.

The Canadian Evaluation Society (CES)

The Canadian Evaluation Society (CES) reviewed its competencies using an EDI lens in 2018 to ensure that related content was present. CES's competency domains are Reflective, Technical, Situational, Management, and Interpersonal Practice, with a number of related subdomains. In total, there are 36 subdomains expressed across the five domain areas of practice. This review found that only three of the domains included explicit references to dimensions of EDI. These three domains are Reflective Practice, Situational Practice, and Interpersonal Practice; most EDI content is presented in the Situational Practice domain, which is represented by four distinct subdomains. Summary results are presented in Table 5.

Table 5. Canadian Evaluation Society Competency Domains, Subdomains, and Relevant EDI Content

Domain	Subdomain	Explicit EDI content
Reflective Practice	Considers the well-being of human and natural systems in evaluation practice.	Well-being of human and natural systems.
Situational Practice	Examines and responds to the multiple human and natural contexts within which the program is embedded.	Human and natural contexts, recognizing, respecting and responding to diversity, reciprocal processes sharing evaluation knowledge and expertise, and focus on reconciliation and Indigenous peoples.
	Identifies stakeholders' needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity.	
	Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all.	
	Uses evaluation processes and practices that support reconciliation and build stronger relationships among Indigenous and non-Indigenous peoples.	
Interpersonal Practice	Uses communication strategies appropriate to the cultural, linguistic, social, and political context.	Attention to cultural, linguistic, social, and political context.

Note. Text on domains and subdomains adapted from *Competencies for Canadian Evaluation Practice,* by CES, 2018 (https://evaluationcanada.ca/files/pdf/2_competencies_cdn_evaluation_practice_2018.pdf).

Under CES's Reflective Practice domain, the stage is set for evaluators to consider the well-being of human and natural systems as part of their practice. This can be interpreted both broadly and specifically by evaluators, depending on their interpretation, to include dimensions of EDI. With some greater specificity, we can see that the Situational Practice domain transitions to more concrete EDI applications inclusive of stakeholders' needs and capacity to participate; recognizing, respecting and responding to aspects of diversity; and building capacity for all as a result of reciprocal processes exchanging evaluation knowledge and expertise. It should be noted at this juncture that subdomain descriptors are also available but were scoped out of this high-level review. These descriptors could be helpful in making greater assertions regarding the state of EDI integration. Finally, the CES Situational Practice domain recognizes the use of evaluation processes and practices that support reconciliation and building of stronger relationships among Indigenous and non-Indigenous people. This subdomain is unique across all evaluation associations reviewed and aligns with the recommendations made by the Truth and Reconciliation Commission of Canada. This is one of the key features distinguishing CES's EDI content (Clark & Bradley, 2022). Further, in Clark & Bradley's comparative review of AEA's and CES's EDI content relative to respective competencies, only the Canadian professional evaluation association explicitly references intersectionality. Because this content is provided under detailed subdomain descriptions, I excluded it from these review efforts, but CES is the only evaluation professional association reviewed that attends to multiple identity factors across a range of domains. This identity multiplicity is hinted at in the Reflective Practice and Interpersonal domains, and more strongly referenced in the Situational Practice domain.

I also noted a detailed EDI subdimension under the Interpersonal Practice domain that identifies the use of communication strategies appropriate to the cultural, linguistic, social, and political context. While some of the constraints noted above in discussions of evaluation communications apply here, context presented by CES under this domain is the most comprehensive outlining of context across professional evaluation associations.. It fails, however, to acknowledge the sometimes-competing priorities of the stakeholders associated with each of the contexts, and it is easy to assume that despite being listed first, the cultural appropriateness may give way to political appropriateness as directed by evaluation funders.

The Canadian Evaluation Society also stands uniquely apart from other organizations because of the inclusion of "well-being of human and natural systems." This intentional incorporation of both human and natural systems lends itself to the introduction of sustainability in evaluation efforts.

The European Evaluation Society (EES)

The European Evaluation Society (EES) has adopted a slightly different approach in its capabilities framework. The three main clusters of the capabilities framework are Knowledge, Practice, and Dispositions, which are refined with evaluation practice. A total of 30 subdomains are aligned with these three clusters. Review efforts identified that only 2 subdomains—professional practice/interpersonal skills and disposition and attitudes—explicitly identified EDI dimensions. Data from review efforts are highlighted in Table 6.

Table 6. European Evaluation Society Capability Clusters, Subdomains, and Relevant EDI Content

Cluster	Subdomain	Explicit EDI Content
Professional Practice / Displays Interpersonal Skills	2.24 Demonstrates gender awareness and cultural sensitivity.	Gender awareness and cultural sensitivity
Disposition and Attitudes	3.1 Upholds ethical standards and democratic values in the conduct of evaluations.	Ethical standards and democratic values

Note. Text on clusters and subdomains adapted from *The EES Evaluation Capabilities Framework,* by EES, 2012 (https://europeanevaluation.org/wp-content/uploads/2020/04/EES-EVALUATION-CAPABILITIES-FRAMEWORK.pdf).

Readers may be interested in knowing that this framework for evaluation practice is one of the earliest developed of those reviewed within the scope of this undertaking. The EES capability framework fails to reference many of the EDI dimensions raised in discussions of other frameworks and is noticeably scarce in its EDI content. This could be considered problematic with the first subdomain, which identifies that evaluators should demonstrate gender awareness and cultural sensitivity with their interpersonal skills under the interpersonal domain. The second of the subdomains with EDI content identifies that evaluators should uphold ethical standards and democratic values (such as equality, fairness, justice, pluralism, tolerance, respect, participation, etc.).

Other Relevant Considerations: Principles, Ethics, Values, and Policy Statements

In synthesizing findings, several in-text references to organizational principles, ethical or value statements, and/or policy statements were noted. I reviewed these references relevant to EDI dimensions to ensure that I accurately captured and understood the intentions in the content presented in tabular and narrative formats for each professional evaluation association. My thinking behind this was underpinned by the recognition that competencies and capabilities were framed by these respective pieces. I assume all responsibility for any misinterpretation. The extent to which EDI is embedded across these resources ranges from the explicit to the less conspicuous. CES, AEA, ANZEA, and AES have developed comprehensive ethics / guiding principles / value statements. Two associations (CES and AEA) have developed more extensive value statements emphasizing the role of evaluation in recognizing and promoting the common good and societal equity as part of a better world. Several associations have articulated how evaluation should be conducted with specific consideration to their region's unique complexities. For example, in AfrEA's resources, complex context, culture, history, and beliefs shape an African approach to evaluation. Association resources also attend to specific groups; for example, AES refers to First Nations and Indigenous peoples. These latter two organizations articulate values/ethics, centralized human rights, and connected concepts such as respect, transparency, integrity, honesty, and authenticity.

Reflection and Implications

For Future Exploration

Having presented these findings, the question as to their meaning for both seasoned and emerging evaluators alike is naturally raised. With the variance of EDI content in professional evaluation associations' competencies, still further questions are raised pertaining to the issues of inequity, sustainability, and inequalities that permeate social justice endeavors for evaluation functions, and evaluation practitioners navigating these spaces. While very important, integrating EDI into evaluation competencies means more than just treating individuals with respect and dignity. This translates to supporting emerging evaluators and evaluation students as part of a commitment to identifying and removing systemic barriers that perpetuate discriminations and prevent the full participation of all individuals in all aspects of society.

Ultimately, each professional evaluation association has adopted some EDI content in their respective competencies to varying degrees, as highlighted in previous sections of this article. Review efforts have led me to perceive that interpreting EDI in the context of evaluator competencies is not as clear-cut as I originally envisioned and would have like to have believed. Reasons for this vary and include EDI content scarcity, the focus on stakeholder relationships, the lack of explicit acknowledgment of individual power and privilege as part of reflective practice, to name but a few examples. Although more data were available than anticipated at the onset of this exercise, the clarity and consistency with which these data are presented across domains present a challenge for both seasoned and emerging evaluators.

These variances represent an opportunity to coalesce EDI content into a separate stand-alone domain as well as integrating it into other domains to support social justice objectives. The potential benefit of having a separate domain that integrates all of a professional association's EDI content with a number of associated subdomains would be to prioritize the urgency of evaluators to address challenges related to inequity and sustainability. The vision for this suggestion is inspired by the approach to equality metrics expressed in the UN Sustainable Development Goals (SDGs). In the context of the SDGs, for example, gender equality is not only a stand-alone goal; it is also embedded within other SDG goals. Adopting such an approach would help pinpoint exactly where supports, tools, and training may be required and, as a consequence, facilitate access for emerging and student evaluators.

Possible Future Directions for Emerging and Student Evaluators

EDI work is complicated and messy. General training opportunities grounded in anticolonialism, antiracism, and antidiscrimination principles exist in Canada and undoubtedly in other jurisdictions. These free online introductory training opportunities include Women and Gender Equality Canada's Gender-based Analysis Plus (GBA Plus) training; [1] the Canadian Institutes of Health Research's (CIHR's) "Bias in Peer Review" training; [2] and the Ontario Human Rights Commission's (OHRC's) training on calling out racism. [3] These are entry-level learning modules that serve to familiarize individuals with key theoretical and conceptual issues and frameworks. However, evaluator-specific training on integrating EDI into the various domains that comprise evaluation practice is much more specific, and more difficult to access. Both seasoned and emerging evaluators seek opportunities that extend across education experiences, including curriculum, courses, and professional development opportunities (Christie et al., 2014). Here again lies another opportunity for these experiences to more fulsomely integrate EDI into their efforts.

It is often based only on project experience that conceptual and operational dimensions of EDI are learned. It has been suggested that safe EDI training experiences for evaluators lie within internship programs, case-based studies, and capstone courses delivered in academic settings. In summary, EDI experiences can involve learning as a result of doing, which increases the responsibility of seasoned evaluators to support emerging and student evaluators.

One example is the capstone projects in graduate evaluation certificate programs. These projects are interdisciplinary and connected with real-world issues. Capstone courses provide evaluation students with the opportunity to develop and simultaneously apply evaluative skills and competencies under the supervision of experienced

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[1] https://women-gender-equality.canada.ca/en/gender-based-analysis-plus/take-course.html
[2] https://cihr-irsc.gc.ca/lms/e/bias/

[3] https://www.ohrc.on.ca/en/learning/elearning/call-it-out

evaluation practitioners. Project teams wrestle with important societal issues influenced by power and privilege that uphold systemic barriers, racism, inequities, and exclusion. Characteristics associated with these projects include teamwork, supervision by qualified personnel, and development of long-standing relationships with evaluation clients and program beneficiaries, which helps to establish trust to have difficult conversations. Recognizing EDI in practical application is, however, at the discretion of the evaluation professors rather than embedded in formal curriculum, despite advocacy efforts in support of developing a more formal curriculum with relevant EDI content.

These EDI-enriched opportunities are potentially limited by real-world application. With faculty guidance and support, academic settings provide safe spaces for emerging evaluators to delve into integrating EDI in evaluations. Limitations, however, exist. EDI implementation challenges arise when the client, funder, program representatives (including management), or even potential evaluation team members raise objections in light of evaluation resource limitations. Frameworks for evaluation practice, and specific competencies, then become even more important as a validated source for pursuing EDI-related actions during the course of an evaluation project.

In this final summary reflection, it is worth noting that as evaluators in pursuit of social justice objectives, we must be guided by and reflect the context in which we work. Evaluators can rest assured that our context will continue to evolve, and so too must the competencies in which we ground our evaluation practice. To continue to be relevant to the world in which we work, our competencies must reflect the evolving dynamic of EDI as a necessary dimension of context. All professional evaluation associations have set aside space in their respective frameworks of principles, competencies, and capacities, but there is room for more significant EDI investments.

Acknowledgments

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