

Evaluate This! A Case for Developing Evaluation Competencies

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Abstract: *The Canadian Evaluation Society (CES) annual Student Case Competition provides an opportunity for university students from all regions of Canada to acquire invaluable experience. This practice note by members of the winning team in the 2015 competition explains how participating contributed to the development of specific evaluation competencies. Participation in the competition is recommended to other students as an excellent way to learn, grow, and develop evaluation expertise that should prove useful in any chosen career.*

Keywords: *case competition, competencies, evaluation, request for proposal, students*

Résumé : *Le Concours de simulation d'évaluation de la Société canadienne d'évaluation (CES) fournit aux étudiants universitaires de toutes les régions du Canada une occasion d'acquérir une expérience inestimable. Cette note sur la pratique de l'évaluation par les membres de l'équipe gagnante du concours 2015 explique comment leur participation a contribué au perfectionnement de compétences précises en évaluation. La participation au concours est recommandée à d'autres étudiants comme excellent moyen d'apprendre, de grandir et d'acquérir de l'expertise en évaluation qui constituera un atout, quelle que soit la carrière choisie.*

Mots clés : *concours d'études de cas, compétences, évaluation, demande de proposition, étudiants*

Since 1996, the Canadian Evaluation Society (CES) has organized an annual Student Case Competition in which teams of university students compete in the analysis of real-world programs.¹ The competition provides student teams from all regions of Canada an opportunity to respond to a hypothetical request for proposals or other tasks related to the evaluation of a given program (CES, 2015). In Round 1 of the competition, teams have 5.5 hours to prepare and submit an

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Table 1. Competencies discussed by students

Student	Competency	Subcompetency
Kirstian	1. Reflective practice	1.6 Is aware of self as an evaluator (knowledge, skills, dispositions) and reflects on personal evaluation practice (competencies and areas for growth)
Daniel	2. Technical practice	2.2 Specifies program theory
Sarah	3. Situational practice	3.1 Respects the uniqueness of the site
Linzi	4. Management practice	4.5 Coordinates and supervises others
Micheal	5. Interpersonal practice	5.9 Attends to issues of diversity and culture

analysis to be judged by a bilingual panel of experts. The top three teams are then invited to participate in a final round that takes place at the CES annual conference. There the finalists have five hours to analyze a new case and then present their proposal before a live audience and panel of judges.

For students, the Case Competition provides a unique and invaluable learning experience (Nykiforuk et al., 2003). As members of the winning team in 2015 who competed against 20 teams of graduate students from diverse disciplines, we aim in this note to show how participating can contribute to the development of many of the competencies required of credentialed evaluators. The competencies for Canadian evaluation practice consist of five domains under which 49 competencies are organized. These competencies are the foundation of the Credentialed Evaluator² designation (Buchanan & Kuji-Shikatani, 2014). The high-level domains of competencies for evaluation are (a) Reflective Practice, (b) Technical Practice, (c) Situational Practice, (d) Management Practice, and (e) Interpersonal Practice. In the following narratives, each member of our team from the University of Saskatchewan will address a competency from one of the domains and explain how it has been strengthened by our involvement in the Case Competition (see Table 1 for a summary of the competencies discussed by each student).

KIRSTIAN, FIRST-YEAR MASTER'S STUDENT AND FIRST-TIME CASE COMPETITION PARTICIPANT: REFLECTIVE PRACTICE

I agreed to join the team “Paradigm Shift Evaluations” three months before undertaking a program evaluation course. As a first-year Applied Social Psychology Master's student, I was aware of two research paths students may take within our program: lab-based (directed toward the main goal of theory development or knowledge building) or evaluation-focused (directed toward addressing specific

research questions identified within the community/societal context). Discussions of the Case Competition within my program seminars were vague yet intriguing. Senior students discussed the benefits and enjoyment of participating in this national competition. Having little knowledge of what evaluation really entailed, other than its potential for community-based research, I decided to join the team as a means of quickly understanding evaluation. I began training for the competition with only one evaluation lecture under my belt—just enough to understand that logic models existed, but with little awareness of how to develop these integral evaluation tools.

Through attending numerous team-building meetings, practice rounds, and lectures, I was able to develop and refine my evaluation knowledge and skills, thus creating an awareness of myself as an evaluator (Competency 1.6, a Reflective Practice competency). As a junior team member, I was given assistance in identifying and improving upon my strengths and weaknesses through team discussions with more senior members and our coach. I quickly understood the necessity of submersing myself within an evaluation case to fully comprehend the needs of a program and what is required for any given evaluation. As no decision was made unless all team members, including myself, agreed with the direction we were heading, I was required to further my understanding of program evaluation when recognizing my competency limit was exceeded. When it was apparent that my knowledge was not sufficient to take part in the next practice round, meetings were arranged and readings were provided as a means of addressing these deficits. Building the knowledge of program evaluation with a strong team and coach allowed me to strive for professionalism and perfection within an unfamiliar setting. Understanding the expectations of a new “world” was initially frightening, but the experience brought excitement for what is yet to come in my professional evaluation future. Developing self-awareness as an evaluator through identifying my personal strengths as well as my weaknesses will benefit my ability to be reflective, and thus benefit my practice, in the future.

DANIEL, FIRST-YEAR PHD STUDENT AND THIRD-TIME CASE COMPETITION PARTICIPANT: TECHNICAL PRACTICE

I first participated in the Case Competition as a Master’s student in 2010. At that time, I had taken a course in program evaluation, but was otherwise unexposed to the actual practice of evaluation. Arguably, the steepest part of the learning curve for a beginner evaluator is parsing program documents to succinctly and accurately delineate the program theory. Thus, specifying program theory (Competency 2.2, a Technical Practice competency) was a particular focus in preparing for the competition. The practice rounds, as well as the actual rounds of the competition, were important for learning to identify the flow and underlying assumptions of the program theory as well as developing a working knowledge of the components and linkages of logic models. As a budding evaluator, I drew

upon course and textbook material, but the competition itself provided the opportunity to apply my developing skills and better understand how program theory is identified and presented.

After a few years of working in the field of evaluation, I returned to pursue a PhD and once again competed in the Case Competition. Although I was more familiar with evaluation practice and methods this time around, the competition was an excellent opportunity to enhance my ability to ascertain the theoretical underpinnings of a program and to quickly draft a comprehensive logic model. The breadth of cases that are used in the competition have allowed me to examine programs in areas other than those to which I am accustomed. Such cases required that I brush up on different types of models, presentation styles, and tools used in other domains of evaluation. Indeed, in the years that I have participated in the Case Competition, we have had a diversity of cases that possessed unique theories of change presented in various contexts. At times this has been a challenge, since some of these cases seem to require novel ways of conceptualizing a program theory, but it has been a welcome undertaking because it required my team to expand our capabilities.

Initially, the Case Competition was valuable for me in developing the ability to interpret and specify program theory. Returning to it as a PhD student, I further see how my capacity as an evaluator has increased as a result of my participation and how the competition can serve as a continuing education opportunity for returning students like myself. The opportunity to investigate and experiment with different ways of outlining program theory and creating logic models has helped refine my competency as an evaluator.

SARAH, FIRST-YEAR PHD STUDENT AND THIRD-TIME CASE COMPETITION PARTICIPANT: SITUATIONAL PRACTICE

For me, the competition primarily facilitated the development of situational competencies. Having completed seven years of education (a Bachelor's degree, a Master's degree, and one year of a PhD) in Psychology, I have been able to build my technical practice skills and theoretical foundation for research and evaluation work. However, applying the technical competencies and theoretical foundation to real-world situations and working with real programs can be challenging, because I (and perhaps many PhD students) spend much of my time working in either an abstract space, with theoretical concepts, or in a laboratory space with highly controlled variables and superficial circumstances. The Case Competition has allowed me to leave the laboratory and enter the real world. Due to the time-limited nature of both rounds of the competition and the variety of programs and cases that we could face, the competition provides a challenge in which we have to think on our feet and apply our previous knowledge and training to a unique case. In particular, the competition has pushed me to foster Competency 3.1 in the Situational Practice group, "Respects the uniqueness of the site."

This competency is fostered to some degree by the competition because of the wide variety of cases that could be the focus of a given round. Nonetheless,

for many cases the same tried and true approaches such as “utilization focused evaluation” (Patton, 2008), “contribution analysis” (Mayne, 2012) and “triangulation” (Rothbauer, 2008) will apply. Thus, for many cases, a previously developed presentation template only needs to be slightly tweaked when a team responds to a request for proposals. Sometimes, however, you can be handed a bit of a “curveball” (i.e., difficult, unexpected, or unfamiliar). Unexpected cases can enhance situational competencies because they force evaluators to move beyond the template, to move beyond our tried and true methods and really consider the needs of the evaluation users and uniqueness of the site. In my experiences in the Case Competition, I have had to go beyond my standard evaluation “toolkit” including linear logic models, pre-post designs, and a reliance on quantitative methods because at times these tools seemed not only epistemologically inappropriate for the case, but also probably ineffective for obtaining the type of information that would best serve the information needs of the evaluation users.

There were times in the competition when my team and I received a case that required us to trade in traditional evaluation staples for more site-aligned epistemologically appropriate tools and methods. As a result, we decided to radically overhaul our template and take the proposal in a direction in stark contrast to our typical approach. It is through these types of “curveball” cases that the Case Competition has fostered the development of this situational competency by challenging me to progress beyond my tried and true evaluation approaches and methods to learn about and apply more site-appropriate practices.

LINZI, SECOND-YEAR PHD STUDENT AND THIRD-TIME CASE COMPETITION PARTICIPANT: MANAGEMENT PRACTICE

Competency 4.5, one of the Management Practice competencies, relates to the coordination and supervision of students. Although this competency may seem more applicable to coaches and faculty who mentor student competitors, many of its components also reflect the role that senior students can play in the Student Case Competition. In our department, a wide range of students are encouraged to take part in the competition each year. Team members often find themselves at different points in their academic training and with various skill levels. Junior graduate student competitors may be just starting their training in program evaluation and are given a chance to develop practical skills by working on a variety of cases. Through this, they have the opportunity to learn from senior students who have more experience with the competition. Senior graduate students, on the other hand, are given a chance to further their skill sets and to improve upon previous competition submissions. They are also often given an opportunity to become mentors for junior students.

This year marked my third time competing in the Case Competition, but it was the first opportunity for my team to participate in the final round. Having always been one of the more senior students on my teams, I found that Competency 4.5 most resonated with me and defined my experience. The first

time I competed in the Case Competition was in 2012 as a second-year Master's student. My team comprised other first-time competitors and Master's students. I was chosen by our coach to be the team leader and was tasked with overseeing all of the individual components of the case submission and ensuring the team stayed on course. This was one of the first opportunities I had to lead a group. I competed the following year as a first-year PhD student. That year, my team consisted of Master's and PhD students, four of whom had competed previously. As a senior-level competitor, I was again afforded the opportunity to mentor the newer students. Both years my team scored well above the average of almost 30 teams. Areas for improvement as suggested by the judges for these years included identification of assumptions and risks, more attention to barriers to program access, inclusion of sufficient numbers of indicators, and a greater emphasis on quantitative rather than qualitative methods. While it was disappointing not to have gone to the finals, I focused on the positive gain in experience for myself as a team leader and mentor.

This year, Team Paradigm Shift included two junior Master's-level students who had never taken part in the competition and had only just been introduced to program evaluation. As Kirstian described, the Case Competition can provide new students with the opportunity to gain exposure to the field of program evaluation and help them identify personal strengths and weaknesses. The other team members included three PhD students who each had at least two years of experience with the competition. One was part of a winning team from the University of Saskatchewan in 2011. For myself, this team composition lent itself well to activities that directly relate to Competency 4.5. Specifically, the more senior members of the team were able to experience a number of management-type activities: integrate the evaluation team's and individuals' various tasks and activities to collaboratively conduct the evaluation, maximize the strengths of each individual on the team, oversee the work of the individuals on the team, provide constructive feedback, and train and mentor junior evaluators. These activities were instrumental in our team's success and helped to develop our mentoring competency.

MICHEAL, FIRST-YEAR MASTER'S STUDENT AND FIRST-TIME CASE COMPETITION PARTICIPANT: INTERPERSONAL PRACTICE

I was given the opportunity to participate in the Case Competition for the first time this year. When I joined the team, I knew little about evaluation and even less about the CES competencies. I was able to benefit from interactions with experienced team members, as well as our coach, who all demonstrated patience and took every opportunity to impart evaluation knowledge, techniques, and experiences to me. During the five-month process, I was able to develop a foundation for many of the CES competencies, which has set me on a path to becoming a better evaluator. However, it is easy to pick out a competency within the Interpersonal Practice domain—Competency 5.9, “attends to issues of diversity and culture—as the one that I was able to develop most as a result of the Case Competition.

I have always been motivated to examine the barriers that Aboriginal men and women face in Canada, so I was pleased to learn that our final-round case featured an Aboriginal youth leadership program. Initially, like Sarah, I assumed that standard evaluation methods, theories, and practices we had used in previous rounds in the competition would apply to this program. I was convinced that methods such as sharing circles would be enough to demonstrate “cultural sensitivity” in our proposal. My thoughts quickly changed, due in part to two factors: (a) an issue of the *Canadian Journal of Program Evaluation* (Cousins & Johnston, 2008) featuring Aboriginal evaluation practices, and (b) our team’s decision to use a nonlinear logic model based on a medicine wheel, attempting to facilitate an Aboriginal way of understanding.

After reading the 2008 CJPE issue, I reflected on what I had learned and subsequently embraced a holistic way of understanding and practicing evaluation. Our team decided to create a nonlinear medicine wheel logic model and incorporate more culturally sensitive thinking material (e.g., development of a nonlinear theory of change for the program; use of methods like Photovoice and sharing circles; and consultation with elders, community members, and youth). This fostered the development of Competency 5.9 and the idea that nonstandard evaluation practices can sometimes prove to be more applicable. The positive feedback we received from Case Competition officials further solidified this idea for me, and instilled the confidence I needed to conclude that we had developed a culturally sensitive proposal that attended to the diverse needs of the Aboriginal Youth Leadership program.

CONCLUSION

The Case Competition is a unique learning opportunity for students across Canada with varying experience levels, enabling them to build a foundation for, and continue to develop, the CES evaluation competencies. Although participation in the Case Competition has the potential to contribute to the development of many competencies, in this article we have selected five that have been fostered for us during the competition process: refining evaluation skills and knowledge, specifying program theory, respecting the uniqueness of the site, coordinating and supervising students, and attending to issues of diversity and culture. Having had this simulated experience of creating a program evaluation framework while in graduate school has better prepared us for our first professional evaluation opportunities. Rather than beginning our careers with limited classroom instruction, we are beginning our professional life with some “real-world” experiences from which to draw.

It is advantageous to develop these evaluation capacities early on, as they should prove useful in any career and, for those who focus on evaluation, provide a foundation for obtaining the CES Credentialed Evaluator designation. Participating in the Case Competition provides students with a head start in that they can begin to develop competencies that can be used going forward in their careers.

We recommend that students take advantage of this unique opportunity to learn, grow, and create a foundation for life-long evaluative thinking.

NOTES

- 1 The case title and participating organization for Round 1 was Settlement Integration Services from Immigrant Women Services Ottawa (IWSO), and for Round 2 it was Aboriginal Youth Leadership Program from Canada World Youth (CWY).
- 2 To learn more about the CE designation, visit the Canadian Evaluation Society's CE designation page: www.evaluationcanada.ca/ce

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