

Core Competencies for Postgraduate Evaluation Courses

Report of the GEMNet-Health Task Group

July 2017

WP-17-188



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This publication was produced with the support of the United States Agency for International Development (USAID) under the terms of MEASURE Evaluation cooperative agreement AID-OAA-L-14-00004. MEASURE Evaluation is implemented by the Carolina Population Center, University of North Carolina at Chapel Hill in partnership with ICF International; John Snow, Inc.; Management Sciences for Health; Palladium; and Tulane University. Views expressed are not necessarily those of USAID or the United States government. WP-17-188



ACKNOWLEDGEMENTS

This report was developed by the U.S. Agency for International Development-funded MEASURE Evaluation (Hemali Kulatilaka, Alex Coombs, and Lauren Hart) based on the work of the GEMNet-Health Core Competencies Task Group. The task group members were Juan Pablo Gutiérrez (Chair, INSP, Mexico); Himanshu Negandhi (PHFI, India); Seblewengel Lemma (ACIPH, Ethiopia); Andy Beke (University of Pretoria, South Africa); Kerry Richter (IPSR, Thailand); George Otieno (Kenyatta University, Kenya); Genevieve Aryeety (University of Ghana, Ghana); and Sian Curtis (MEASURE Evaluation). The competencies were developed and agreed on by the task group. Many thanks to all members for their time and expertise.

We thank the knowledge management team of MEASURE Evaluation, based at the University of North Carolina at Chapel Hill, for editorial and production services.

Support to the task group was provided by MEASURE Evaluation, the GEMNet-Health secretariat, by Hemali Kulatilaka and Alex Coombs.

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INTRODUCTION

The Global Evaluation and Monitoring Network for Health (GEMNet-Health) is a global network of public health institutions whose purpose is to foster organizational growth, collaboration, and mutual support for monitoring and evaluation (M&E) of health programs through linkages among members. As countries seek to improve their M&E capacities, they need specific training in evaluation at the postgraduate level. The GEMNet-Health Steering Committee convened a time-limited technical task group to address this need. Building on previous curriculum harmonization efforts to develop core competencies for M&E programs, the Task Group on Core Competencies for Postgraduate Evaluation Courses sought to develop core competencies for a 60-hour master's level overview course in evaluation. The aim of the task group was to identify a set of essential competencies and corresponding core elements of curricula for postgraduate evaluation courses, which would help GEMNet-Health member institutions develop a consistent and coordinated approach to evaluation training.

In evaluation education, developing and defining core competencies ensures that graduates of a program develop the necessary skills and knowledge to succeed in their field. Despite widespread recognition of the importance of developing competencies, a common understanding of what the core competencies related to evaluation within global health should be is absent. Evaluation training is carried out by many different institutions, with different curricula, and involves many different disciplines. This makes it difficult to reach consensus about the knowledge and skills that evaluation professionals should attain. Identifying core competencies will help harmonize postgraduate evaluation training across institutions and promote a shared understanding of the knowledge and skills that global evaluation professionals require.

When designing postgraduate-level evaluation courses, it is important to consider what skills and knowledge people practicing evaluation in their workplaces will need. While these skills will likely differ for professionals coming from different regions, countries, and institutions, there are core skills and knowledge that are globally recognized as necessary for evaluation practice. Defining the levels of mastery expected of students completing the evaluation course facilitates the development of learning objectives for each competency.

This report presents background on the task group's approach, including the reasons for following a competency-based approach to evaluation training. Then, building on a review of competencies from postgraduate-level evaluation courses at several dozen universities, the report identifies core evaluation competencies organized by skill level and topic. It concludes with recommendations for core and optional competencies for an overview evaluation course at the master's level.

BACKGROUND

A competency-based approach to evaluation education and training recognizes core competencies that are required to carry out evaluation functions. Competencies include both the skills and knowledge required to carry out a task. As such, competency-based education focuses on learner outputs rather than the inputs of the training. After determining the competencies that learners should acquire from the training, instructors can develop the learning objectives that these learners must reach to achieve the competencies.

Developing and defining competencies is important for several reasons. In the context of education, programs may use competencies to ensure graduates develop the necessary skills and knowledge to succeed in their field; professional organizations may use competencies for licensing or credentialing people or institutions; and individuals may use competencies for reviewing their work and identifying areas for improvement.

The core competencies task group consisted of representatives from GEMNet-Health member institutions. All task group members had evaluation instruction responsibilities or experience within their home institutions. The task group’s goal was to reach consensus on a list of core competencies for postgraduate evaluation courses, organized by topic and level and develop a report presenting this information. By delineating what competencies are essential for a postgraduate course in evaluation, the report allows instructors to incorporate these core competencies in their curriculum and adapt them to their students’ specific needs.

METHODS

The methods used by the task group were developed collaboratively by MEASURE Evaluation and the task group members. The task group began by assessing an existing review of core competencies in postgraduate evaluation courses. In summer 2015, a graduate research assistant conducted a review to assess what core competencies were present across postgraduate courses in evaluation at institutions of higher education. This included reviewing and updating a previous unpublished review of core competencies of M&E postgraduate courses previously conducted by GEMNet-Health. That list of courses was reassessed based on the relevance of each course to the current project. Courses in this review had a strong evaluation component and were in English. Information was updated through online searches.

The project focused on the top 10 schools of public health in the United States, GEMNet-Health partner institutions, other non-U.S. global health universities, and evaluation associations (see Appendix A), which led to a total of 38 institutions reviewed (13 in the United States and 25 outside the United States). The project researched syllabi and course websites to gather a list of learning objectives and, if available, competencies for the courses. These learning objectives were then organized thematically as shown in the table below. These six themes provided a starting point for the task group to begin devising the core competencies of an evaluation course.

Table 1. Themes of postgraduate evaluation courses

Theme	Sample Language for Competency
Characteristics of Evaluation	Describe the concepts, approaches, and types of evaluation, including the purpose of evaluation and use of appropriate terminology.
Use of Evaluation Theory and Models	Demonstrate knowledge of the theoretical frameworks, models, and practices involved in evaluation research.
Evaluation Methods	Assess and select evaluation methods suitable to the situation, including being able to discuss the goals, strategies, and strengths and weaknesses of different designs.
Evaluation Design	Design an evaluation relevant to the context, including organization, target population, stakeholders, and health outcomes.
Considerations & Implications	Describe key considerations of an evaluation plan, including practical constraints as well as ethical and political implications of evaluation work.
Communication of Results	Communicate evaluation results effectively both in oral and in written forms, including making findings relevant to the audience.

Next, the task group deliberated over whether each theme was relevant for a postgraduate evaluation course. The group divided up the competencies among the members and for each competency, one member completed the following assignment:

1. Determine if the theme reflected at least one competency relating to a 60-hour master's level overview course on evaluation. If yes, then they were asked to draft all the competency statements that fit under this theme.
2. For each competency that was written, indicate the level of the competency that should be achieved by a student completing this evaluation course. The levels were basic, intermediate, and advanced.

For each competency, the task group also determined a level (e.g., basic, intermediate, or advanced) as well as the theme or topic under which the competency fit. The individual work on each of these competencies formed the basis for the group's deliberations over the final list of competencies. Two of the themes—evaluation design and evaluation methods were combined into one thematic area. The task group agreed that the following should be considered the five core themes:

1. Characteristics of evaluation
2. Evaluation theory
3. Evaluation design and methods
4. Practical considerations and ethical implications
5. Communication of results

In addition to the themes the group deemed core or essential to postgraduate evaluation education, there were several themes that were noted but considered optional by the group. These were

- Performing an evaluation
- Cost-effectiveness and cost-benefit analysis
- Implementation science
- Data collection, quality, and sources
- Data analysis
- Data use
- Indicators
- Evidence-informed interventions and decision making
- Needs assessment
- Cultural context
- Role of policy in evaluation

For each of the core themes, the task group then developed corresponding competency statements, grouped by level—beginner, intermediate, and advanced (available below).

After the task group determined the list of core and optional competencies for postgraduate evaluation education, MEASURE Evaluation conducted a mini-workshop on developing and refining postgraduate-level evaluation curricula in May 2016, in Ghana, for several of the GEMNet-Health faculty. This group provided review and feedback. The draft list of core competencies was also shared with the GEMNet-Health steering committee for review and approval in March 2016. This report includes feedback from both the mini-workshop in Ghana and the March 2016 Steering Committee meeting.

Table 2. Core competency statements by theme and level

Core Themes	Competency Statements
Characteristics of Evaluation	<p>Basic: CORE</p> <ul style="list-style-type: none"> • Discuss evaluation in the context of public policies <p>Intermediate: CORE</p> <ul style="list-style-type: none"> • Analyze policy cycle and results chain (outputs/ outcomes/ impact/ interventions) <p>Advanced: CORE</p> <ul style="list-style-type: none"> • Assess the role of evaluation for policy making and the link of strategic information to evaluation
Evaluation Theory	<p>Basic: CORE</p> <ul style="list-style-type: none"> • Demonstrate knowledge of relevant evaluation theories • Outline program theory approach and describe its foundations and assumptions <p>Intermediate: CORE</p> <ul style="list-style-type: none"> • Illustrate evaluation theories using stylized examples <p>Advanced:</p> <ul style="list-style-type: none"> • Compare evaluation theories, highlighting their pros and cons related to a specific context • Illustrate developments from program theory and explain the issues related to: <ul style="list-style-type: none"> ○ Systems thinking ○ Developmental evaluation ○ Realistic evaluation ○ Comprehensive evaluation
Evaluation Design and Methods	<p>Basic: CORE</p> <ul style="list-style-type: none"> • Create sound and appropriate evaluation questions • Describe/recognize common quantitative and qualitative methods of data collection that are used in different types of evaluations • Recognize common statistical challenges in evaluation such as confounding, bias, selection, statistical power (statistics knowledge is considered a prerequisite) <p>Intermediate: CORE</p> <ul style="list-style-type: none"> • Appraise common evaluation designs and appropriate contexts for using them • Critique evaluation designs and their implementation • Critically review evaluation results • Assess and select an appropriate evaluation method for a defined health program and resource context <p>Advanced:</p>

	<ul style="list-style-type: none"> • Apply selected evaluation design and methods rigorously
Practical Considerations & Ethical Implications	<p>Basic: CORE</p> <ul style="list-style-type: none"> • Discuss practical constraints in evaluation research <ul style="list-style-type: none"> ◦ List the key considerations in planning an evaluation and describe strategies for navigating these challenges • Illustrate ethical principles for research and how those apply to evaluation <ul style="list-style-type: none"> ◦ Identify and list the ethical and political implications of evaluation work ◦ Design an ethically acceptable evaluation plan <p>Advanced</p> <ul style="list-style-type: none"> • Assess strategies to overcome practical constraints in evaluation work • Infer and prioritize key considerations in select evaluation situations • Develop and implement evaluations that meet ethical principles
Communication of Results	<p>Basic: CORE</p> <ul style="list-style-type: none"> • Describe how data from an evaluation study can be interpreted and how a final report should be written • Describe who the audience for the evaluation is, including their role • Develop a dissemination plan for results <p>Intermediate: CORE</p> <ul style="list-style-type: none"> • Illustrate how to organize results so that they provide evidence to answer evaluation questions <ul style="list-style-type: none"> ◦ Present results and recommendations that have practical application for the audience (evidence-based decision-making) • Outline ways to increase demand for evaluation results and evidence-based decision making <p>Advanced:</p> <ul style="list-style-type: none"> • Structure results and apply methods such as data visualization, and how these concepts can be used to communicate the results of an evaluation study to decision makers • Generate opportunities for using evaluation results for learning within an organization • Elicit and synthesize stakeholder comments into evaluation findings and recommendations

NEXT STEPS

Outside of GEMNet-Health, the competencies are meant to be used as a tool by those who are involved in developing competencies, learning objectives, and curricula for postgraduate-level overview courses on evaluation. It is not meant to proscribe content but can be a tool for developing new courses or revising existing courses.

Both the task group and the mini-workshop participants recommended that GEMNet-Health consider building on these competencies and developing learning objectives and course materials related to these core competencies, with a focus on basic- and intermediate-level competencies (e.g., reference materials, slides, and talking points). The learning objectives and additional materials will help course instructors design syllabi for their evaluation courses establish the level of competency that students can expect to achieve by completing a given course. Many of these materials already exist at GEMNet-Health partner institutions, but need to be compiled, organized, and packaged for sharing and use. These materials would form a detailed set of course materials for a core postgraduate overview course on evaluation. These materials could be customized and adapted by instructors—within and outside of GEMNet-Health.

APPENDIX: LIST OF INSTITUTIONS AND ORGANIZATIONS REVIEWED

(Total = 38)

- Australia
 - Curtin University
- Canada
 - McGill University
 - University of Waterloo
 - University of Alberta School of Public Health
 - University of Toronto Dalla Lana School of Public Health
 - International Program for Development Evaluation Training
 - Canadian Evaluation Society
- Ethiopia
 - Addis Ababa University
 - Addis Continental Institute of Public Health
 - Jimma University College of Health Sciences
- Ghana
 - University of Ghana, School of Public Health
- India
 - Public Health Foundation of India
- Kenya
 - Kenyatta University, School of Public Health
- Mexico
 - Instituto Nacional de Salud Pública (INSP)
- Senegal
 - Centre Africain d'Etudes Supérieures en Gestion
- South Africa
 - University of Cape Town - The Institute for Monitoring and Evaluation
 - University of Pretoria, School of Health Systems and Public Health
 - University of the Western Cape School of Public Health
- Sweden
 - Karolinska Institutet
- Thailand
 - Mahidol University, Institute of Population and Social Research
- United Kingdom
 - London International Development Centre
 - London School of Hygiene & Tropical Medicine
 - University of Cambridge
 - University of East Anglia School of International Development
- United States
 - Boston University School of Public Health
 - Claremont Graduate University
 - Columbia University Mailman School of Public Health
 - Emory University Rollins School of Public Health
 - Harvard School of Public Health
 - Johns Hopkins Bloomberg School of Public Health

- Tulane University School of Public Health and Tropical Medicine
- University of California Berkeley School Public Health
- University of California Los Angeles Fielding School of Public Health
- University of Michigan School of Public Health
- University of Minnesota School of Public Health
- University of North Carolina Gillings School of Global Public Health
- University of Pittsburgh Graduate School of Public Health
- University of Washington School of Public Health

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