

# Evaluation Practicum

## Guide for Participants

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## I. Overview

The Evaluation Practicum is an interactive online mentoring program associated with the Evaluation for Evaluation Specialists (EES) course, sponsored by the Office of Learning, Evaluation and Research (LER) in the Bureau for Policy, Planning and Learning (PPL) at USAID. USAID staff members who successfully complete the EES course are encouraged to participate in the Practicum. The Practicum is designed to reinforce and further develop the evaluation competencies (knowledge, skills, abilities, and observable behaviors) gained in the EES course with 'hands-on' experience in evaluation. The overall goal of the EES course and the Practicum is to bring USAID Evaluation Specialists closer to realizing the evaluation competencies identified for USAID Evaluation Specialists. (See Annex 1 for the list of Evaluation Competencies). Evaluation Specialists are designated evaluation point persons in their Operating Units and Bureaus, including those in Program and Technical Offices, who are responsible for identifying evaluation opportunities, designing, advising on, and managing evaluations as well as working with consultants and evaluation teams as a routine part of their work.

USAID staff members who complete both the two-week EES course and all the requirements of the Practicum are eligible to become certified as USAID Evaluation Specialists (see Box on right for requirements).

Agency Certification in Evaluation (ACE) is voluntary. Although certification is not and will not be required for any particular position at USAID, becoming certified represents the attainment of key evaluation competencies that

### **Voluntary Agency Certification in Evaluation**

**To become certified as a USAID Evaluation Specialist the following is required:**

1. Complete the two-week USAID **Evaluation for Evaluation Specialist (EES) Course**
2. Complete the **Evaluation Practicum**. The Practicum consists of four components (A, B, C, and D)

Component A. Participate in a field-based evaluation for at least one week during the data collection phase and complete at least 7 corresponding journal entries.

Component B. Select and complete at least one of the following activities and at least 3 corresponding journal entries:

1. Develop a Mission Evaluation Order
2. Develop an evaluation Statement of Work (SOW) for an evaluation
3. Supervise and provide quality assurance for an evaluation
4. Develop an Evaluation Capacity Building (ECB) Plan for a USAID Operating Unit or for a local implementing partner organization
5. Conduct a meta-evaluation of a USAID or other donor-sponsored evaluation(s)
6. Conduct a meta-analysis of a set of evaluations.

Component C. Complete a series of short readings on performance and/or impact evaluations and successfully complete an on-line quiz.

Component D. Complete a 5-6 page lessons learned and reflection paper.

will help strengthen the quality of the design, implementation, and management of USAID-sponsored evaluations with the goal to enhance learning and improve USAID programs.

The Practicum is delivered online and allows professional development opportunities for Evaluation Specialists who are geographically distant from mentors and peer advisors who would otherwise not be available to them. Practicum participants and mentors can interact more frequently, at more convenient times, and in more structured ways than they would be able to in a workshop. Similarly, the online mentoring format facilitates thoughtful, task-oriented interaction through supervised tasks, activities, and experiences.

The Practicum is designed to be flexible in responding to the participant's evaluation learning needs and objectives. Each Practicum will be competency-based and designed to build specific evaluation knowledge and skill sets. Therefore each Practicum will be slightly different in content, though the basic structure and format will be similar for most participants.

This *Guide* provides an overview and description of the Practicum. The description covers learning objectives, success factors, mentor's and participant's roles, preparatory work, summary of components and work structure and the anticipated time commitment for participants.

The EES course and Practicum are being delivered for USAID staff in Washington and in Missions under the Design and Delivery of Evaluation Training Task Order (TO) contract managed by PPL/LER (TO AID-OAA-10-00065 under the IQC RAN-I-00-09-00019) and awarded to Social Impact, Inc. The mentors for the Practicum are senior level consultants working for Social Impact. The COTR for the Task Order is Jonathan Shepard ([jshepard@usaid.gov](mailto:jshepard@usaid.gov)). The Project Director and Program Manager at Social Impact, Inc. are Rolf Sartorius ([rsartorius@socialimpact.com](mailto:rsartorius@socialimpact.com)) and Danielle de Garcia ([ddegarcia@socialimpact.com](mailto:ddegarcia@socialimpact.com)). The Practicum Coordinator at Social Impact is Justin Reppert ([practicum@socialimpact.com](mailto:practicum@socialimpact.com)).

## II. Learning Objectives

The Evaluation Practicum serves as a requirement for Agency Certification in Evaluation (ACE), and helps to ensure that all certified Evaluation Specialists have the opportunity to further develop the evaluation competencies that will help ensure that they can provide leadership in planning, implementing, and advising on evaluation activities. In order to achieve this goal, the Practicum aims to:

1. Reinforce technical skills in designing, planning and implementing high quality and useful USAID evaluations presented in the EES course;
2. Provide opportunities for USAID staff to experience being a part of an evaluation team;
3. Build advisory skills as they support USAID evaluations that may be conducted by USAID, implementing partners or evaluation contractors;

4. Produce at least one high quality and useful evaluation product(s) for an Operating Unit such as a completed statement of work (SOW) for an evaluation, a Mission Evaluation Order, a meta-evaluation of an evaluation, etc.; and
5. Create a long-term collaborative learning community in USAID that will continue to build and promote a culture of evaluation to improve USAID’s development effectiveness.

In addition, the Evaluation Practicum seeks to build the credentials and professional development of USAID staff.

### **III. Critical Success Factors**

Recent research on online mentoring programs indicates that successful programs share several “critical success factors.” These include:

1. Establishing a context for communication between mentors and practicum participants (Ensher, et al. 2003);
2. Having meaningful learning activities, closely linked to on-the-job tasks (Frey, 2008);
3. Creating collaborative learning communities for participants (Frey, 2008);
4. Clearly delineating the roles and responsibilities of mentors and practicum participants (Ensher, et al. 2003);
5. Using a participant (rather than mentor) centered learning model (Rowland, et al. 2005 and Graybinger & Dunlap, 1996);
6. Having a useful and intuitive communication structure and supporting software platform (Frey, 2008 and Knapczyk, 2005);
7. Linking the practicum experience closely to the course content and concepts (Frey, 2008);
8. Mentors who are able to play multiple roles of technical expert, coach, facilitator with flexibility to respond to individual learning needs of participants;
9. Clear operational procedures for entering the practicum, establishing learning objectives, defining and reviewing products, evaluating participant learning and evaluating mentors, etc.; and
10. Management and supervisory support for participant participation in the Practicum experience.

Each of the above factors is integral to the design and execution of the Evaluation Practicum for Evaluation Specialists as described below. While these factors are incorporated into the design of the Practicum, both mentors and participants play a large role in reinforcing and ensuring their presence.

## IV. Practicum Components and Requirements

To meet all the requirements of the Practicum, each participant must complete Component A, Component B (at least one item from the list below), Component C, and Component D as follows:

- **Component A:** Participate on an evaluation team during the field-based data collection phase for a minimum of one week (more time is highly encouraged).
- **Component B:** Complete one of the following:
  1. Develop a USAID Mission Evaluation Order in alignment with USAID’s Evaluation Policy;
  2. Develop a Statement of Work for an evaluation ensuring its completeness and its alignment with USAID’s Evaluation Policy<sup>1</sup>;
  3. Supervise and ensure quality assurance for an evaluation;
  4. Design (and if feasible implement) an Evaluation Capacity Building (ECB) Plan for a USAID Operating Unit, implementing partner or host country organization;
  5. Conduct a meta-evaluation of a completed USAID evaluation; or
  6. Conduct a meta-analysis of two or more completed USAID evaluations.

Note: In addition to the above choices, a participant may suggest an alternative evaluation-related product. The suggested alternate must be approved by the mentor, Practicum Coordinator at Social Impact, and the COTR at USAID.

- **Component C:** Complete a series of short readings on performance and/or impact evaluations and complete an on-line quiz. Note: At the time of this version of the *Practicum Guide* the required reading is *Impact Evaluation in Practice* by Paul Gertler, published by the World Bank in 2010. This very readable, short book will be provided to all participants taking the Practicum.
- **Component D:** Complete the necessary written assignments and develop a 5-6 page lessons learned and reflections paper (described in more detail below).

Practicum participants will be assigned a mentor—a Senior Evaluation Specialist working with Social Impact—who will provide approximately ten (10) hours of coaching and support for each participant over the course of the Practicum. To provide input into the participant’s individualized learning plan for the Practicum, and to allow the opportunity to review and provide feedback on the participant’s activities, a series of on-line written assignments are required as follows:

1. **Evaluation Competency Self-Assessment.** A self-assessment survey will be administered to all participants once they enroll in the Practicum. This assessment will serve as the basis for participants’ learning plans, and will serve as a means by which to measure their achievement over the course of the Practicum experience.
2. **An Individual Learning Plan and Contract.** The Individual Learning Plan and Contract is an agreement between the Practicum participant and mentor and is based on the Evaluation Competency Self-Assessment taken at the beginning the Practicum, the Concept Note, individualized learning objectives, and anticipated deliverables.
3. **Journal entries.** Participants will be required to complete ten (10) online journal entries and ensuing discussion threads, each structured around learning related to a particular phase of the

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<sup>1</sup> Selection of an SOW is dependent on approval that there is no Conflict of Interest potential. SOWs released through pre-competed mechanisms are preferred.

evaluation process. Typically these will include topics outlined in Section IX of the Guidance.

4. Active participation in on-line discussions. Providing questions to peers and to mentors and providing feedback on questions asked by other Practicum participants. (Note: The frequency of on-line discussions will be related to the number of participants from each EES cohort who join the Practicum.)
5. A completed evaluation product. The interim evaluation product(s) will be posted and reviewed by the mentor (and possibly peer learners) at several different stages. While the products and tools will depend on the type of project chosen, these could include:
  - Mission Evaluation Order
  - Draft Statement of Work
  - Draft Evaluation Capacity Building Plan, etc.
6. Evaluation of the Practicum. There are two parts to the evaluation:
  - A re-assessment of personal evaluation competencies
  - An online assessment of the Practicum experience
7. A Reflections and Lessons Learned paper. This paper will be used by the instructor to evaluate student performance and to reference in future Practicums; as well as by the student to reference with respect to continuing his or her professional development as an evaluator. The 5-6 page paper will have four parts:
  - Statement of personal achievements/learning against objectives in the learning contract
  - Lessons learned in conducting/advising on USAID evaluations
  - Recommendations for improving evaluation practice (processes, implementation and utilization) at USAID
  - Next steps for continued professional development as an evaluator in USAID

The Practicum is designed to ensure a flexible time frame in order to accommodate differing time requirements of selected evaluation activities. Participants are expected to complete the Practicum within 6-12 months of enrolling. It is expected that participants will spend up to 35 hours on the general Practicum requirements, in addition to the hours spent as part of an evaluation team (Component A) and working on their selected evaluation product (Component B) .

## V. Mentor's Role

Practicum mentors will ideally have participated as trainers in the Evaluation for Evaluation Specialists (EES) training, and should therefore have an in-depth understanding and familiarity of the EES course objectives and curriculum as well as the typical questions, issues and concerns of USAID Evaluation Specialists who seek to be certified. A mentor will be assigned to each Practicum participant. Every effort will be made to match mentors with the interests and learning needs of the participants. All the mentors are senior level evaluation experts with years of practical experience.

All Practicum mentors are expected to:

- ❖ In collaboration with the participant, aid in the identification and selection of an appropriate field-based evaluation experience and an evaluation-related product to develop<sup>2</sup>;
- ❖ Administer and assess participants' individual learning plans, working with each participant to establish realistic goals and objectives for the Practicum;
- ❖ Ensure the learning plan and contract are completed successfully over the course of the Practicum through communication, feedback, and support;
- ❖ Post discussion questions and facilitate dialogue on the discussion forum;
- ❖ Create and utilize podcasts, video conferences and mini-workshops as appropriate and relevant;
- ❖ Provide approximately ten (10) hours of individual mentoring to each participant;
- ❖ Maintain and document contact with each participant, responding within three days to specific questions asked of them by Practicum participants;
- ❖ Assess the participants' completed evaluation products and lessons learned paper;
- ❖ Submit a final Practicum report describing activities undertaken, findings from the post-Practicum evaluation, and recommendations for future Practicum experiences.

In addition to these specific tasks, mentors are expected to develop and maintain a culture of openness allowing for confrontation of obstacles and difficulties; support of excellence; acceptance of personal responsibility; and professional ethics.

## VI. Participants' Role

Participants in the Practicum are expected to be motivated and proactive in the Practicum experience, openly communicating with the mentor. Furthermore, they are expected to:

- ❖ Speak with their supervisors and upper management to ensure they have the necessary support for Practicum participation;
- ❖ Secure a letter of approval for participation in the Practicum from their supervisor;
- ❖ In collaboration with the assigned mentor, develop an individual learning plan and contract for the Practicum experience;
- ❖ Identify a field evaluation to participate in as a team member or as an observer for at least one week during the data collection phase of a field evaluation (Component A of the Practicum);
- ❖ Secure a Letter of Agreement signed by the 1) participant, 2) supervisor, 3) representative from the Program Office sponsoring the evaluation, and 4) designated Team Leader of the field evaluation describing the role, responsibilities, and length of time during of the participant in the field evaluation;
- ❖ Actively engage in the field evaluation by a) reading and reviewing all relevant background information about the evaluation—including relevant reports and data—prior to joining the

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<sup>2</sup> Note: The selection of a Practicum experience is the responsibility of the participant. While USAID and Social Impact will assist in matching participants with known opportunities, it is up to the participant to contact relevant staff and conduct necessary activities in order identify Practicum opportunities.

team in the field; and b) contributing to the evaluation team efforts to the extent feasible as delineated in the Letter of Agreement;

- ❖ Complete at least one evaluation product (Evaluation Mission Order, SOW, etc.) (Component B of the Practicum);
- ❖ Complete 10 short online journal entries over the duration of the Practicum (described in more detail in Section IX) and participate in related discussion threads;
- ❖ Actively participate in online discussions by posing questions to peers and mentors, and providing feedback on questions asked by other Practicum participants;
- ❖ Communicate regularly with the mentor to discuss progress and resolve problems during the Practicum experience;
- ❖ If requested, peer review another participant's completed evaluation product;
- ❖ Complete a series of readings on performance and/or impact evaluations and successfully complete an on-line quiz relating to the readings (Component C of the Practicum);
- ❖ Develop a 5-6 page lessons learned and reflections paper (Component D of the Practicum), and
- ❖ Complete a post-Practicum evaluation.

Additional details relating to the Practicum requirements are found in Sections VII and VIII.

## **VII. Preparation for Participating in the Practicum**

To participate in the Practicum, the following are necessary:

- 1) Confirmation of successful completion of the Evaluation for Evaluation Specialist (EES) Course
- 2) Approval of Concept Notes for Components A and B of the Evaluation Practicum
- 3) Approval by supervisor to participate in the Practicum
- 4) Selection of field-based evaluation opportunity
- 5) Letter of Agreement to participate in a field-based evaluation
- 6) Selection of discrete Evaluation Product to complete
- 7) Orientation of participant to Practicum software

### **1. Confirmation of Successful Completion of EES Course**

All USAID staff members who successfully complete the Evaluation for Evaluation Specialist (EES) Course are eligible to enroll in the Evaluation Practicum. To successfully complete the EES course, participants must be present 90% of the time over the duration of the two-week course and actively participate in class exercises and discussions.

EES graduates may elect to enroll in the Practicum at any time, but are encouraged to do so as soon as possible after the end of taking the EES course so that they can begin to put into practice the knowledge and skills that they have learned.

During the EES course, the trainers will spend some time with the participants discussing the Practicum and its requirements. The USAID Contractor for delivery of the EES course, Social Impact, Inc. has a designated Practicum Coordinator for the Practicum. The Coordinator serves as a resource for the Practicum participant and will link the participant to the mentor and help identify ways to help the participant fulfill the Practicum requirements.

All USAID staff members who successfully complete the course are able to demonstrate that by obtaining a certificate of completion from the USAID University/Learning Management System (LMS) site. A link to the site and this feature is as follows:

<http://university.usaid.gov/MaestroC/OnlineResourceDocs/2/LMS%20-%20HowTo%20Print%20Certificate.doc>

Social Impact also keeps a record of those who complete the EES course so in most cases, scanning and emailing a certificate of completion of the EES course to the Practicum Coordinator will not be necessary. If requested, however, potential participants in the Practicum will be required to provide a copy of EES completion.

## **2. Approval of Concept Note for Evaluation Practicum**

The Practicum Concept Note (see Annex 2) is a short form to be completed by the participant. The Concept Note acts as a preliminary discussion piece in which the participant sketches out his or her plan for completing Components A and B of the Practicum. In the Concept Note, the proposed participant states his or her objectives for the Practicum, anticipated timing for the Practicum, and provides a brief description of how the participant plans to complete the Practicum including key activities. The participant should identify the field evaluation they wish to join as well as what evaluation product will be developed, if known. Concept Notes are first submitted to the Practicum Coordinator (Justin Reppert at [practicum@socialimpact.com](mailto:practicum@socialimpact.com)) whom will review the Concept Notes in a relatively short timeframe and work with participants to develop a workable preliminary plan. Please note that if a participant wishes to develop a SOW to fulfill the requirements for Component B, it will be necessary for the participant to confirm that a conflict of interest does not exist for Social Impact. Please see Section VIII for details.

## **3. Supervisor Approval Letter to Participate in the Practicum**

Participating in the Practicum is an intensive effort and requires a significant of time and commitment on the part of the participants. To ensure that the participant has the full support of their supervisor, all participants are required to submit a signed letter from their supervisor and addressed to the Practicum Coordinator at Social Impact. The letter should be obtained as soon as the Concept Note (see above) is approved. The letter should clearly indicate the name of the participant, the name/region of the 'sending' Operating Unit, and 1-2 sentences describing how the Practicum is expected to benefit the sending Operating Unit. Supervisor Approval Letters may be forwarded to the Practicum Coordinator (Justin Reppert at [practicum@socialimpact.com](mailto:practicum@socialimpact.com)).

Note: Once the Concept Note is approved and the supervisor approval letter is submitted to the Practicum Coordinator, the Practicum participant will be assigned a mentor.

#### **4. Selection of a Field-based Evaluation Activity**

The selection of an appropriate field-based evaluation is a crucial step to ensure that the Practicum is a rich and rewarding experience for the participant. Participants are encouraged to identify an evaluation to join as far in advance as possible so that they can observe the entire evaluation process and participate at optimal times during its implementation to enhance learning. The Practicum requires participants to, at minimum, to travel with an evaluation team for at least one week during the data collection phase (Component A of the Practicum).

Although the responsibility for identifying and selecting an appropriate evaluation rests primarily with the participant, the selection is a collaborative process that involves at minimum the Practicum Coordinator, the mentor, and the Program Office sponsoring the evaluation. Joining the evaluation team also requires the consent of the Team Leader who has been assigned to lead the evaluation.

#### *Resources to help identify a Field Evaluation*

The following parties may be able to assist the participant to identify a suitable field-based evaluation:

- The Program Office associated with the participant's Operating Unit
- Program Officers in the Pillar or Regional Bureaus and Offices
- Evaluation points of contacts in USAID Technical Offices
- Colleagues and peers from the EES course
- Implementing partners
- Contacts and colleagues participating in USAID's Evaluation Interest Group (EIG). The EIG listserv can be accessed through the EIG SharePoint site. To join the listserv and obtain a copy of instructions to accessing the EIG SharePoint site and how to request assistance, please contact Virginia Lamprecht at ([vlamprecht@usaid.gov](mailto:vlamprecht@usaid.gov))
- The Program Service Cycle Center in PPL (new in FY12). Inquiries can be made at this email address: [programservicecyclecenter@usaid.gov](mailto:programservicecyclecenter@usaid.gov)
- PPL/LER plans to assign a point person in 2012 to help USAID staff find upcoming, suitable evaluations to join as team members.

In addition, participants can review the Missions' Performance Plan and Report (PPR) to identify upcoming evaluations to identify an opportunity they would like to be involved in. The participant will be responsible for contacting the appropriate USAID staff persons (typically in the Program Office in a Mission) to determine the feasibility of joining the team. USAID headquarters staff members from PPL/LER, including the COTR and the PPL Regional Backstop, as well as the appropriate Regional Bureau representatives are available to assist with communicating with the Mission.

Although the majority of participants will be joining evaluations sponsored by USAID, it is possible for participants to join evaluation activities outside of USAID. Such opportunities may include joining an evaluation team with the host country government, other donor or an NGO. Social Impact can help facilitate the identification of other evaluation opportunities on a case-by-case basis.

### *Factors to Consider when Selecting a Field Evaluation*

In addition to considering what specific learning objectives the participant wants to achieve through participation on an evaluation team, the following factors should be considered when selecting an evaluation to join:

- The sectors and regions of interest to the participant
- Timing of the evaluation in relation to the participant's own availability
- Length of time and intensity of effort the participant is able to contribute to the evaluation effort
- Available resources, including those linked to the participant's mechanism, to support the costs of participating in a field-based evaluation
- Participant skill sets and areas of expertise which could contribute to the evaluation
- The anticipated quality of the Team Leader designated for the evaluation
- The type of evaluation being implemented and the strength of the project or program's existing management and M&E systems

A few of the points listed above are expanded below.

### *Role of the Participant in the Evaluation*

The role that the participant will play within the team will depend on a number of factors including, but not limited to, prior commitments, management support, financial and logistical support, the type of activities to be undertaken and prior evaluation experience. A key determinant will be the amount of time the participant can devote to the evaluation effort. USAID and Social Impact understand the time constraints placed on many USAID staff members. As such, participants are not expected to play a major role in managing the evaluation or drafting of the final evaluation report, however, it is expected that the participant contribute to the evaluation effort in a meaningful way. Specific tasks may include activities such as designing a data collection instrument, assisting in data collection, compiling data, synthesizing and writing up the results of a specific data collection effort or portion of the draft report, etc.

Joining an evaluation team represents a unique opportunity for learning through direct experience. In general, the more the participant can become involved as a member in an evaluation, the more learning can be realized. The role of the participant can range from full team member to an observer and must be agreed upon prior to joining the team.

### *Resources to Support the Participant*

PPL/LER and Social Impact do not have resources to support the field-related costs of the Practicum for participants, including but not limited to salary, airfare, hotel, or per diem. Practicum participants are encouraged to explore ways to support their Practicum experience through the mechanisms that sponsor them, such as the Development Leadership Initiative (DLI), through professional development funds, or by direct support from the Operating Unit sponsoring the evaluation.

### *Qualities of the Team Leader*

The participant is encouraged to seek an evaluation that will be led by an established and well respected Team Leader who is seasoned in leading USAID-sponsored evaluations in the field. Ideally, the Practicum participants will be placed within an evaluation that is well designed and where evaluation standards and practices are modeled by team members. Although PPL/LER and Social Impact will try to assist participants to identify good evaluation opportunities to join, they have limited control over the Team Leaders hired by Missions. Evaluations provide opportunities for growth and learning and participants can and do learn from both ideal and less than ideal situations. Practicum participants will have the opportunity to reflect on their experiences and identify how they would improve evaluation processes and implementation, based upon the standards and tools they have been provided in the EES course.

### *Type of Evaluation and Strength of the Program/Project's Management and M&E System*

Practicum participants are encouraged to consider whether they would like to join a midterm (process) or final (summative) evaluation; a project or program evaluation; or a performance or impact evaluation. The number of interventions, partners, and places involved in a project or program will determine the degree of its complexity. If time is limited, the participant may elect to join an evaluation for a relatively circumscribed project or program, or participate in a limited portion of a larger effort.

To the degree that a project is well managed and has a functioning, well-defined M&E system, the easier it will be to determine if the expected results have been achieved. Once that is determined, the evaluation can focus more readily on the 'how' and 'why' questions related to the results. Participants wanting to focus on exploring those questions, rather than joining an evaluation that must reconstruct baseline and possibly endline data, are encouraged to review program's Performance Management Plan (PMP) or the projects' M&E plan prior to selecting the evaluation for their Practicum experience.

### *Vetting the Evaluation*

The mentor and participant will be in close communication during the vetting stage to ensure that each selected activity ensures a meaningful experience which contributes to a heightened level of evaluation expertise. The Practicum mentor assigned to the participant is ultimately responsible for vetting the evaluation to determine whether or not the proposed role of the activity would provide a meaningful learning experience sufficient for Practicum and certification requirements.

## 5. Letter of Agreement for Participation in the Field-based Evaluation

Component A of the Practicum requires participants to join an evaluation team for at least one week during the data collection phase of a field-based evaluation. To ensure that all key parties have a common understanding of the participant's role, time commitment and responsibilities related to the field-based evaluation, participants are requested to draft a letter of agreement, in collaboration with their assigned mentor, and have the letter signed by the following: 1) participant, 2) participant's supervisor, 3) representative from the Program Office in the Operating Unit sponsoring the evaluation, and 4) the Team Leader of the field-based evaluation. The letter of agreement will include the following:

- An estimate of the total number of days the participant can commit to the evaluation effort
- Anticipated start and end dates of participation
- Role of the participant (full team member, team member for a specific task(s), observer, etc.)
- Expected contributions as well as and specific tasks and products to be completed (if any).

The Letter of Agreement, signed by all parties, should be forward by the participant to the Practicum Coordinator at Social Impact and copied to the COTR.

## 6. Selection of a Discrete Evaluation Product

Component B of the Practicum is the completion of at least one evaluation project from a list of possible products listed in Section IV and copied here:

1. Develop a USAID Mission Evaluation Order in alignment with USAID's Evaluation Policy;
2. Develop an Scope of Work ensuring its completeness and its alignment with USAID's Evaluation Policy (see Section VIII for information about mitigation of conflict of interest);
3. Supervise and ensure quality assurance for an evaluation;
4. Design (and if feasible implement) an Evaluation Capacity Building (ECB) Plan for a USAID Operating Unit, implementing partner or host country organization;
5. Conduct a meta-evaluation of a completed evaluation; or
6. Conduct a meta-analysis of two or more completed evaluations.

Note: In addition to the above choices, a participant may suggest an alternative evaluation-related product. The suggested alternate must be approved by the mentor and by the point person at Social Impact overseeing the Practicum as well as the COTR.

Participants are requested to select, in consultation with their mentor, one product to work on and complete during the Practicum.

All evaluation products are subject to approval based on their feasibility, ability to achieve Practicum objectives, and avoidance of conflict of interest. Should participants wish to develop an evaluation SOW

to fulfill Component B of the Practicum experience, rigorous selection criteria will be utilized. Eligible SOWs include:

- SOWs for evaluation contracts which SI already has, which have 2 or more years of remaining life;
- SOWs for mid-term and/or internal evaluations that will not be procured outside of USAID;
- SOWs for evaluations that will be procured by another donor;
- SOWs for evaluations that USAID will procure through a mechanism that SI is not eligible for (e.g. an evaluation that will be procured through a mechanism that SI is not a party to and that contract has at least two more years of life at the time the participant submits the Concept Paper to SI)

For other SOWs that may be procurement sensitive, the participant may be able to receive mentoring through the USAID/PPL Project Cycle Help Desk rather than through this mechanism. In this case, the participant will work with the Evaluation Training COTR to obtain this technical assistance.

#### Mission Evaluation Plans:

SI cannot provide input on Mission Evaluation Plans, as they would reveal a schedule of upcoming evaluations which is not yet public. As such, Mission Evaluation Plans are no longer eligible as an option for Component B.

#### **7. Orientation to the Practicum Software**

During the Practicum, most of the communication will be conducted on-line using special software tailored for the specific use of Practicum participants and their mentors. The software allows for one-one conversations, discussion forums, posting of journal entries, file sharing, etc. Participants will be oriented to the software and will be provided with the brief *User's Manual for the Online Practicum* to help them begin working remotely with their mentor. The Practicum Coordinator, Justin Reppert at Social Impact, is available to answer questions about the Practicum site and software and its usage. He can be contacted at [practicum@socialimpact.com](mailto:practicum@socialimpact.com).

### **VIII. Conflict of Interest Mitigation**

Practicum participants must not divulge procurement sensitive information at any time to Social Impact, Inc. including its trainers, senior evaluation consultants who mentor participants, and its subcontractors (Management Systems International).

To mitigate the risk for COI for Social Impact, Practicum participants selecting Component B, Option 2, "Develop a Statement of Work for a USAID-sponsored Evaluation" Practicum participants are directed to identify an assignment that meets the following criteria:

1. The proposed SOW will not be the basis or incorporated into a future USAID procurement action.
2. If the SOW is being developed under a contract, the contract must have been rewarded to Social Impact or another contractor AND there must be at least two years remaining on the contract at the time the participant submits the Concept Paper to Social Impact.

**The burden of determining whether or not the proposed SOW will be developed under a contract that has already been competed or not and to whom falls on the participant, who will work with the Program Office sponsoring the evaluation to make this determination. This determination will be noted in the Concept Note at the time it is submitted to the COTR.**

If the SOW being developed is for an internal USAID evaluation, and no contractor will be involved, there is not a COI issues relating to procurement.

## **IX. Structure of Practicum Components**

### **1. COMPONENT A**

#### **Participate in Field-based Data Collection for an Evaluation**

**Component A of the Practicum requires a minimum of one week of participation on an evaluation team during the data collection phase of a field evaluation.**

Participants are encouraged to join evaluation team as full team members, however, most often Practicum participants will be able to join an evaluation team for a limited period of time with the expectations that their contribution(s) will be specific and discrete. The experience with field-based data collection is intended to build real-world skills in data collection, analysis, reporting and team work under the time and resource constraints that are typical of most evaluations. Participants are expected to fully prepare for the field work by reading all relevant project background documents prior to working with the evaluation team.

Participants are expected to complete 6 journal entries for this component, which may include any of the below options or other entries as determined between the participant and mentor.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and learning “contract”. Invite questions and feedback.	<ul style="list-style-type: none"> <li>• Learning objectives for this component of the Practicum. These will be discussed with the mentor.</li> </ul>
<b>Stage 1: Deciding to Evaluate</b>	
Journal 2--Post rationale and background for evaluation. Invite questions and feedback.	<ul style="list-style-type: none"> <li>• Review all pertinent project documents including project design, performance reports and background documents</li> <li>• Upfront planning and contextual analysis; key evaluation questions; type of evaluation to be undertaken.</li> </ul>
<b>Stage 2: Planning to Evaluate</b>	
<p>Journal 3—Describe key decisions behind Evaluation SOW elements.</p> <p>Journal 4—Post SOW and invite questions and feedback.</p>	<ul style="list-style-type: none"> <li>• Describe the process for arriving at design decisions defined in SOW—who was consulted, what do they need to know, what is the degree of consensus on evaluation questions and design decisions; what are strengths and weaknesses of propose evaluation approach?</li> </ul>
<b>Stage 3: Implementing the Evaluation</b>	
<p>Journal 5—Post data collection and analysis plan. Post description of experience participating as member of the evaluation team during data collection phase. Invite questions and feedback related to evaluation implementation.</p> <p>Continue thread with questions related to implementation and quality assurance</p> <p>Journal 6—Post draft and final reports and continue with questions and feedback related to QA.</p> <p>Mentor “signs off” on final report.</p>	<ul style="list-style-type: none"> <li>• Detailed data collection and analysis plan including sampling strategy and site selection.</li> <li>• Describe tradeoffs considered when putting together data collection and analysis strategy.</li> <li>• Describe key threats to internal and external validity and how they will be mitigated.</li> <li>• Describe your role in data collection phase and lessons learned</li> <li>• What are the key quality issues related to the draft report?</li> <li>• What strategies should be used to strengthen evaluation quality?</li> <li>• How does the report fair against Quality Standards?</li> </ul>
<b>Stage 4: Using the Evaluation</b>	
<p>Journal 7—Repost Evaluation Communication Plan. Invite questions and feedback related evaluation use.</p> <p>Continue to post updates related to evaluation use.</p>	<ul style="list-style-type: none"> <li>• How does the evaluation communication plan at the report stage differ from the one envisioned in the SOW?</li> <li>• What are key opportunities for promoting evaluation use?</li> <li>• What are key barriers/threats to utilization?</li> <li>• What strategies/actions will you take to minimize threats and maximize opportunities for use?</li> <li>• What are emerging signs of use?</li> </ul>

## 2. COMPONENT B: Complete at least one discrete evaluation product

Practicum participants are required to complete at least one evaluation product from the six (6) options listed in this section. They should complete 3 journal entries regarding this component.

### **Component B Option 1: Develop a Mission Evaluation Order**

The Mission Evaluation Order (MOs) is the guiding document for missions and operating units describing the purpose and role for evaluation within a particular USAID operating environment. The MO is issued by the Program Office with sign-off by the Mission Director. All MOs must be aligned with USAID’s Evaluation Policy. The development of the MO involves consultation with the Program Office, technical offices and senior management. Updated and revised MOs will have a stronger focus on evaluation quality and use for program design/investment decisions, program improvement, accountability and learning purposes. Resources for developing Mission Orders can be found on the internal USAID Evaluation Interest Group SharePoint Site.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for developing the MO.	<ul style="list-style-type: none"> <li>• Describe opportunities and challenges for developing the MO and issued that need to be addressed/strengthened in the current MO.</li> <li>• Review recent USAID guidance/TIPS on developing MOs.</li> <li>• Describe key offices/individual that should to participate in the MO revision process.</li> <li>• Describe timeline for revising new MO</li> </ul>
<b>Stage 1: Develop the Mission Evaluation Order</b>	
Journal 2--Post the draft MO and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Conduct working group sessions with Program Office, Technical Offices and Mission Director to educate on evaluation requirements under the USAID Evaluation Policy.</li> <li>• Develop draft MO</li> <li>• Vet with mission Program Office, technical offices and Mission Director/Deputy Director</li> <li>• Develop and refine MO as needed</li> <li>• Mission Director issues new MO</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• How does the MO respond to the requirements of USAID’s evaluation policy?</li> <li>• What are key opportunities and barriers to promoting the new MO evaluation standards in your mission?</li> <li>• What are some lessons learned for developing MOs that can be used by other missions/operating units?</li> </ul>

## **Component B Option 2: Develop an Evaluation Statement of Work (SOW)**

Many shortcomings in past USAID evaluations can be traced to poorly conceived SOWs with overly ambitious sets of evaluation questions and lack of time and budget for quality evaluation work. This task centers on more typical EES skill sets involving defining high quality SOWs for evaluations. It is most appropriate for those who have not yet practiced or developed skills in this area. For more advanced specialists, developing a SOW for a more complex, multi-country, multi-donor, multi-sector or impact evaluation may be challenging learning task to develop new knowledge and skills. This task centers on developing high quality SOW for a specific evaluation through work with the Program Office, technical offices and in some cases host country government and implementing partners. As stated earlier, SOWs must be selected based on careful criteria to mitigate potential conflicts of interest. As stated above, SOWs must be selected based on careful criteria to mitigate potential conflicts of interest (see Section VIII).

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for working with Program Office, technical office and other key stakeholders to develop a strong Evaluation SOW following standards in USAID Evaluation Policy.	<ul style="list-style-type: none"> <li>• Describe the purpose, key users and anticipated opportunities and barriers for the evaluation.</li> <li>• Describe the plan for using the evaluation</li> </ul>
<b>Stage 1: Supervise and Manage the Evaluation</b>	
Journal 2--Post the draft evaluation SOW and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Working with the Program Office, technical offices and other stakeholders define an evaluation SOW that meets the standards in USAID’s Evaluation</li> <li>• Pay particular attention to focusing priority evaluation questions, determining practical methods and estimating a realistic level of effort and budget with adequate time for preparation, data collection, data analysis, report writing and communicating evaluation f</li> <li>• Review the draft SOW using the USAID Checklist for Reviewing SOWs.</li> <li>• Elicit feedback from key users, Program Office and IPs to strengthen the SOW.</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• How does the SOW respond to the information needs of key users?</li> <li>• How did you prioritize evaluation questions?</li> <li>• How did you ensure an adequate level of effort and budget for the evaluation?</li> <li>• What are key opportunities and barriers to conducting this evaluation and promoting it use?</li> <li>• What strategies/actions should be taken to maximize use of the evaluation?</li> <li>• What are some lessons learned for improving evaluation</li> </ul>

### **Component B Option 3: Supervise and Provide Quality Assurance for an Evaluation**

This task centers on more typical EES skill sets involving evaluation supervision and quality assurance and it is most appropriate for those who have not yet practiced or developed skills in this area. As such, many Practicum participants should select other options that provide more of a stretch to enhance their evaluation knowledge and skills. This task involves working with the Program Office, Technical Office, and the Evaluation Team to ensure that a new evaluation is well planned and well executed. The task may or may not involve work to develop the evaluation SOW with the main focus being on actively managing the implementation phase of the evaluation.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for working with Program Office, Technical Office and evaluation team to ensure a useful, high quality evaluation.	<ul style="list-style-type: none"> <li>• Describe specific anticipated opportunities and challenges for managing the current evaluation so that it is useful for intended users.</li> <li>• Describe the plan for using the evaluation</li> </ul>
<b>Stage 1: Supervise and Manage the Evaluation</b>	
Journal 2--Post the draft evaluation plan and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Review the evaluation proposal/SOW and provide comments to the evaluation team to help them focus the evaluation</li> <li>• Assist team in accessing relevant project documents and reports as needed</li> <li>• Review the team's work plan, data collection plan and draft data collects tools and provide suggestion to help them conduct a useful high quality evaluation</li> <li>• Create and implement an evaluation communication and/or utilization plan</li> <li>• Review preliminary and recommendation findings with team and provide feedback.</li> <li>• Help organize workshops to share evaluation findings and to develop action plans to implement recommendations</li> <li>• Review draft and final Report using USAID Evaluation Report Checklist. Provide feedback to team to help them finalize a high quality report</li> <li>• Ensure that finalized report is entered to the DEC</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• How does evaluation report respond to the requirements in the original SOW?</li> <li>• What are key opportunities and barriers to promoting use of the evaluation in the mission and with partners?</li> <li>• What strategies/actions should be taken to maximize use of the evaluation?</li> <li>• What are some lessons learned for improving evaluation quality and use in USAID?</li> </ul>

## **Component B Option 4: Develop and Evaluation Capacity Building Plan**

Many USAID missions and operating units will need assistance to strengthen their understanding of USAID’s Evaluation Policy and to build their capacity to implement it. Similarly, implementing partners and host country governments or civil society groups may be prime candidates for ECB. ECB may involve skills development and introducing new systems, procedures and incentives to promote quality evaluation and evaluation use. This task is one where USAID Evaluation Specialists will assess ECB needs and develop and implement an ECB plan for USAID, another donor, or a local partner.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for developing mission, IP or local partner evaluation capacity.	<ul style="list-style-type: none"> <li>• Describe opportunities and challenges for developing the mission evaluation plan.</li> <li>• Describe the Mission’s current Evaluation Mission Order</li> </ul>
<b>Stage 1: Develop the Evaluation Plan</b>	
Journal 2--Post the draft ECB plan and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Meetings with Program Office, Technical Offices and IPs to determine preliminary interest in ECB.</li> <li>• Conduct ECB needs assessment</li> <li>• Collaboratively develop ECB strategy and action plan (including resource requirements) working with relevant USAID offices and partners</li> <li>• Implement ECB strategy and action plan</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• How has the ECB approach that you have implemented strengthened the evaluation capabilities of the mission or outside partners? What is the target group able to do better with evaluation now compared to the past?</li> <li>• What more needs to happen to build evaluation capacity? How can you promote continued ECB with your group?</li> <li>• What strategies/actions will you take to minimize to maximize evaluation use?</li> <li>• What are some lessons learned for ECB for other USAID missions?</li> </ul>

## **Component B Option 5: Conduct a Meta-Evaluation of an evaluation**

A meta-evaluation is an evaluation of one or more evaluations. It is commonly confused with meta-analysis of evaluations using statistical and other techniques to analyze common patterns across a number of studies. In this task Evaluation Specialists will focus on evaluating a completed USAID or other donor evaluation using the American Evaluation Association (AEA) Program Evaluation Standards or one of the several available checklists for meta –evaluation. This task is intended to build knowledge and skills to recognize and reinforce high quality evaluations in USAID’s operational environment. Evaluations that score highly on the meta-evaluation checklist ratings might be held up as good practice examples in USAID and they may be particularly useful in reinforcing efforts to revitalize USAID’s evaluation capacity.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for the meta-evaluation.	<ul style="list-style-type: none"> <li>• Describe opportunities and challenges for conducting the meta-evaluation.</li> <li>• Why was this particular project (or set of projects) selected for a meta-evaluation?</li> </ul>
<b>Stage 1: Conduct the Meta-Evaluation</b>	
Journal 2--Post the write-up for your meta-evaluation and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Review the completed evaluation, original evaluation SOW and supporting documents</li> <li>• Adapt and use one of the Meta-Evaluation Checklist to review the evaluation.</li> <li>• Interview clients and users of the evaluation to see what they about the evaluation quality and its usefulness. Seek specific examples of how the evaluation was used for decision-making purposes by USAID and by implementing partners</li> <li>• Produce a short 3-5 page write up summarizing the findings, conclusions and recommendations from your meta-evaluation</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• What did you learn from conducting the meta-evaluation?</li> <li>• What are key lessons for promoting high quality and useful evaluations in USAID’s operational environment?</li> </ul>

## **Component B Option 6: Conduct a Meta-Analysis of One or More USAID and/or other Donor-sponsored Evaluations**

A meta- analysis is an analysis of evaluations using statistical and other techniques to analyze common patterns across a number of studies. This task is intended to build analytical skills to help summarize the findings of a group of evaluations.

Component	Description
<b>Getting Started</b>	
Journal 1—Post learning objectives and planned process for the meta-analysis.	<ul style="list-style-type: none"> <li>• Describe opportunities and challenges for conducting the meta-analysis.</li> <li>• Why was this set of evaluations selected?</li> <li>• Identify learning resources to help you conduct the meta-analysis</li> </ul>
<b>Stage 1: Conduct the Meta-Analysis</b>	
Journal 2--Post the write-up for your meta-analysis and solicit feedback from mentor and peers.	<ul style="list-style-type: none"> <li>• Review the completed evaluations, original evaluation SOW and supporting documents</li> <li>• Identify an approach to conducting the meta-analysis</li> <li>• Produce a short 3-5 page write up summarizing the findings, conclusions and recommendations from your meta-analysis</li> </ul>
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• What did you learn from conducting the meta-analysis?</li> <li>• What are key lessons for promoting high quality and useful evaluations in USAID’s operational environment?</li> </ul>

### 3. COMPONENT C: Selected Readings on Performance and/or Impact Evaluations

Component C is designed to give Practicum participants exposure to a set of high quality and useful readings that will help reinforce and deepen the participant’s understanding and knowledge of current approaches to performance and impact evaluations. The exact titles will vary according to the needs of the Practicum cohort. After completing the readings, the participant will be required to complete one journal entry on the reading and take a quiz to ensure mastery of the material. The mentor will then be able to provide additional resources should the participant wish to further their knowledge in a particular area arising from the readings.

Component	Description
<b>Stage 1: Complete the Selected Readings</b>	
<b>Stage 2: Write about lessons learned</b>	
Journal 3—lessons learned	<ul style="list-style-type: none"> <li>• What did you learn that is applicable to your work at USAID?</li> <li>• What did you learn that should inform evaluation practices at USAID?</li> <li>• What questions arose that you would like to know more about?</li> </ul>

### 4. COMPONENT D: Lessons Learned and Reflections Paper

Component D is designed to give Practicum participants the opportunity to reflect on the lessons learned during the entirety of the Practicum. The 5-6 page paper will have four parts:

- Statement of personal achievements/learning against objectives in the learning contract
- Lessons learned in conducting/advising on USAID evaluations
- Recommendations for improving evaluation practice (processes, implementation and utilization) at USAID
- Next steps for continued professional development as an evaluator in USAID

The completed paper is forwarded to the mentor with a copy to the Practicum Coordinator.

# Annex 1: Evaluation Competencies for Evaluation Specialists

## 1. Technical Leadership

- Acts in accordance with USAID ADS mandatory and advisory guidance regarding evaluation planning and use.
- Speaks authoritatively about evaluation planning and utilization in Mission/Office program strategizing, program planning and implementation.
- Demonstrates sufficient knowledge of evaluation purposes, designs and methods to guide Mission decisions on evaluation.
- Manages and works with a variety of internal and external stakeholders in planning, managing and using evaluation report findings, conclusions and recommendations.
- Provides evaluation training, mentoring, coaching and technical assistance for USAID and partner staff.
- Demonstrates familiarity with developments in the larger evaluation community, including DAC evaluation standards, strengths and limitations of mainstream and emerging evaluation practices, and knowledge of American and International/Regional evaluation associations.

## 2. Evaluation Planning

- Acts in accordance with USAID Monitoring and Evaluation requirements and practices, and understands difference and relationship between Monitoring and Evaluation in the USAID context.
- Integrates evaluation planning into strategic, program and project planning in accordance with USAID requirements and policies.
- Prepares evaluation Statements of Work that meet USAID standards.
- Emphasizes the need for evaluation baseline data collection as part of the program/project design process.
- Utilizes correct criteria for determining if and what kind of evaluations may be needed and when.
- Estimates resource (funding, personnel, time) requirements and plan for same in the evaluation planning process.
- Distinguishes between outcomes, results and impacts as used in evaluation terminology.
- Develops and operationalizes evaluation questions based on the evaluation's purpose; and links these questions to the evaluation design.

## 3. Evaluation Designs

- Advises on the different utilities and relevance of formative and summative evaluation designs.
- Applies different evaluation designs depending on level of rigor required in developing evaluation findings and conclusions.
- Applies different kinds of evaluation designs that will address the “counter-factual” hypothesis regarding program/project results or impact.
- Selects and utilizes experimental and non-experimental evaluation designs depending on the evaluation’s needs.
- Applies various evaluation designs such as RCT, QED, Mixed Methods, Rapid Appraisal, Case Study, Interrupted time series and longitudinal, Panel, and Cross sectional designs when appropriate for a given evaluation.
- Knows and can construct a program/project theory of change to inform evaluation design selection.
- Identifies opportunities for participatory evaluation design involving a wide range of stakeholders.

#### **4. Evaluation Data Collection and Analysis Methods**

- Identifies standard sources of bias that effect data validity using different methods.
- Distinguishes between standard types of statistics and types of quantitative data used to present and analyze evaluation findings. This includes frequency distributions, cross tabulation, significance tests, and variance analysis.
- Uses qualitative data when applicable and advises on qualitative data collection methods and good practices (including interview skills, focus group facilitation, and survey design and response categories).
- Appropriately uses qualitative data analysis techniques including coding.
- Advises on various sampling techniques (such as random, stratified, and purposive) and their applications and relevance for a selected evaluation or methodology.
- Advises on the utility of various types of data collection and analysis tools using computer software and IT. (e.g., SPSS, Survey Monkey, Computer assisted Content Analysis)

#### **5. Evaluation Report and Utilization Management**

- Recognizes the difference between evaluation findings, analysis and conclusions in evaluation reports.
- Exercises quality control management during the review and comment phase of an evaluation process.

- Advises on the development and utilization of an evaluation utilization plan for ensuring that evaluation results are considered by decision makers and other stakeholders.

## **6. Personal and Social Competencies**

### **Cultural sensitivity**

- Displays cultural sensitivity when selecting the evaluation team and in designing and implementing an evaluation
- Exercises cross-cultural competency in interpersonal interactions and applies this to the evaluation's context
- Includes all relevant stakeholders to the extent possible

### **Communication**

- Uses strong written, verbal, and listening skills to convey questions, findings, and recommendations
- Communicates effectively with evaluation stakeholders using the appropriate language

### **Diplomacy**

- Demonstrates an ability to negotiate and resolve conflicts between stakeholders, clients, and the evaluation team
- Solves problems as they arise while taking into account the various needs of different stakeholders
- Respects differences among stakeholder groups
- Balances client and stakeholder needs

### **Analysis**

- Utilizes systematic thinking, logic, intelligence, and research to analyze complex situations and data
- Exercises sound judgment when making decisions and drawing conclusions.
- Examines assumptions and externalities accurately

### **Teamwork and Leadership**

- Facilitates constructive interpersonal interactions within the evaluation team and with diverse stakeholder groups
- Manages teams with initiative and leadership
- Encourages cooperation between and within evaluations
- Protects confidentiality and/or obtains informed consent of informants and participants

### **Resource Management**

- Manages time efficiently and prioritizes tasks

- Allocates and manages human and financial resources effectively and efficiently

### **Integrity**

- Upholds the integrity of the evaluation process, ensuring objectivity and accuracy of results and findings to the greatest extent possible
- Treats stakeholders with respect and honesty in all interactions
- Adheres to the highest technical standards possible, acknowledging and accurately representing findings, methods, limitations and shortcomings
- Discloses values, interests, and conflicts of interest when appropriate and relevant

## Annex 2: EES Practicum Concept Note Form

Name: Click here to enter text.  
Position: Click here to enter text.  
Position Title: Click here to enter text.

Do you have supervisor approval to participate in the practicum?

Yes:  No:

This concept note is for Component A:  Component B:

In order to ensure a fulfilling Practicum experience, we request that you provide us with a concept note (no more than 1 page) describing your desired or proposed Practicum experience. Feel free to refer to the Practicum Guidance for ideas; or to pull from your own job experience and needs within your department or Mission. Once we receive this information, we will determine whether or not it is suitable for the Practicum, help present ways to strengthen the proposal if needed, and begin the process. As such, please be as specific as possible so that we can best match you with a mentor and structure your Practicum accordingly.

1. Your objectives for the Practicum:
2. Your anticipated timing for the Practicum:
3. Detailed description of how you plan to complete the Practicum—key activities that you will plan to lead or participate in.

**Remember: Practicum participants must not divulge procurement sensitive information at any time to Social Impact. Please do not include sensitive information about upcoming procurements of evaluations or evaluation-related services in your concept note. Please include your concept note with this form, and e-mail both to [practicum@socialimpact.com](mailto:practicum@socialimpact.com).**

## Annex 3: Practicum Requirement List

- Complete the two-week Evaluation for Evaluation Specialists (EES) course
- Completion of a Learning Contract between participant and mentor
- Submission and approval of Concept Note A (field work on an evaluation team)
- Participate for at least one week on an evaluation team during the data collection phase (Component A)
- Completion of 6 journal entries regarding Component A experience
- Submission of Concept Note B (Evaluation Product) to COTR and review and approval by SI
- Develop an evaluation product (Component B)
- Completion of 3 journal entries regarding Component B experience
- Complete required reading(s) and one journal entry on reading(s)
- Pass the online knowledge quiz on the required reading(s)
- Complete a 5-6 page lessons-learned/reflections paper

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