

COMPETENCIES NEEDED FOR IMPACT ASSESSMENT

What competencies do public
institutions need to plan, manage
and oversee impact assessments?



Key Evaluation Competency Frameworks

United Nations Evaluation Group:

Evaluation Competency Framework – the whole system of commissioning, managing, and using evaluation findings (different roles):

- Professional foundations
- Technical skills
- Management skills
- Interpersonal skills
- Promoting a culture of learning

Voluntary Organizations for Professional Evaluation:

- **American Evaluation Association** – focuses on context, stakeholders, power relations, values (e.g. social justice, public good), communication and the use of findings
- **Polish Evaluation Society** – training on counterfactual analyses in the evaluation of financial programmes addressed to entrepreneurs

Regional (umbrella organizations):

- **European Evaluation Society** – defines evaluation capabilities across knowledge, professional practice, dispositions and attitudes; emphasises that commissioners help co-create evaluation quality.
- **Asia-Pacific Evaluation Association** – highlights competencies such as stakeholder needs analysis, evaluability assessment, diversity and inclusion, trust-building, promoting the use and influence of evaluation, and learning through practice.

Competencies required at the respective assessment's

1. CONCEPTUALISATION (designing)

2. DATA COLLECTION

3. DATA ANALYSIS

4. CONCLUSIONS AND RECOMMENDATIONS

5. COMMUNICATING AND USING THE RESULTS

CONCEPTUALIZATION - preparatory stage (1)

KEY COMPETENCIES AT THIS STAGE – essential for a commissioner

A commissioner needs to be clear about **why the impact assessment** is being conducted, **which decisions** it should inform, what **type of impact** is being assessed, and whose perspectives need to be included. It should include:

- ✓ Defining the purpose and scope of the impact assessment
- ✓ Identifying key stakeholders and groups affected by the intervention
- ✓ Engaging stakeholders through a participatory process
- ✓ Understanding the theory of change / intervention logic
- ✓ Formulating impact assessment criteria and research questions

CONCEPTUALIZATION - preparatory stage (2)

KEY COMPETENCIES AT THIS STAGE – important for verifying the contractor's work

A commissioner does not need to design the full methodology, but should be able to assess whether the proposed approach is appropriate, feasible and capable of answering the research questions.

- ✓ Ensuring triangulation of quantitative and qualitative methods, such as surveys, interviews, observations and case studies
- ✓ Reviewing and refining data-collection tools
- ✓ Assessing the proposed sampling strategy
- ✓ Identifying methodological limitations, risks and mitigation measures
- ✓ Planning the research process, including tasks, responsibilities and timelines

DATA COLLECTION

KEY COMPETENCIES AT THIS STAGE – important for verifying the contractor's work

A commissioner should ensure access to relevant **data, documents and stakeholders**, support **ethical procedures**, protect **confidentiality and personal data**, and make sure the assessment does not place an unnecessary burden on participants.

- ✓ Collecting and organising existing data and documents
- ✓ Facilitating access to administrative data and relevant stakeholders
- ✓ Supporting data collection, including surveys, interviews, observations and case studies
- ✓ Checking the quality, consistency and completeness of collected data
- ✓ Ensuring compliance with data protection principles and ethical standards

DATA ANALYSIS

KEY COMPETENCIES AT THIS STAGE – important for verifying the contractor's work

A commissioner should understand how evidence is analysed and interpreted, be able to question the basis for conclusions, and assess whether findings are credible in light of the programme context.

- ✓ Analysing existing and newly collected data, both quantitative and qualitative
- ✓ Comparing evidence from different sources
- ✓ Identifying patterns, relationships and changes
- ✓ Assessing causal relationships and alternative explanations
- ✓ Interpreting findings in their social, institutional, cultural and political context

Assesing and Valuing Impact (1)

KEY COMPETENCIES AT THIS STAGE – essential for a commissioner

A commissioner should contribute to defining what counts as meaningful change, for whom the impact matters most, and which values should guide the interpretation of findings.

- ✓ Assessing the significance of observed changes
- ✓ Assessing the scale, depth and sustainability of impact
- ✓ Identifying positive, negative and unintended effects
- ✓ Analysing how impacts differ across groups
- ✓ Making evidence-based evaluative judgements
- ✓ Recognising uncertainty and limitations in interpreting impact

Assesing and Valuing Impact (2)

KEY COMPETENCIES AT THIS STAGE – essential for a researcher

- ✓ Understanding counterfactual analysis, causal relationships and programme effects, including gross, net and causal effects
- ✓ Assessing counterfactual approaches, such as randomisation, comparison groups, difference-in-differences, propensity score matching and regression discontinuity design
- ✓ Understanding methods for selecting an appropriate control or comparison group
- ✓ Defining indicators and selecting relevant variables for analysis

FORMULATING CONCLUSIONS AND RECOMMENDATIONS

KEY COMPETENCIES AT THIS STAGE – essential for a commissioner

A commissioner should assess whether the recommendations are precise, realistic, useful, feasible and linked to decisions that the institution can actually make.

- ✓ Synthesising findings into clear conclusions
- ✓ Linking findings to the objectives of the intervention
- ✓ Translating findings into practical recommendations
- ✓ Identifying the conditions needed to implement recommendations
- ✓ Prioritising recommendations according to importance, urgency and feasibility

COMMUNICATING AND USING THE RESULTS

KEY COMPETENCIES AT THIS STAGE – essential for a commissioner

A commissioner should ensure that findings do not remain only in the report, but are **discussed, understood and used** by relevant decision-makers and stakeholders.

- ✓ Reviewing the research report and other communication outputs, such as briefs, leaflets, infographics and videos
- ✓ Visualising data and findings in a clear and accessible way
- ✓ Communicating findings to different audiences
- ✓ Facilitating discussion and reflection on the findings
- ✓ Supporting the use of findings by decision-makers and stakeholders
- ✓ Adapting language and messages to the needs of different audiences

CROSS-CUTTING COMPETENCIES

- ✓ Ethical awareness, integrity and independence
- ✓ Critical, reflective and evaluative thinking
- ✓ Ability to engage stakeholders and support participatory approaches
- ✓ Knowledge of relevant standards and principles, including human rights, equity and gender equality
- ✓ Ability to combine research, strategic and practical perspectives
- ✓ Sufficient methodological literacy to assess the quality of contractors' proposals and work
- ✓ Effective management of the evaluation / impact assessment process
- ✓ Safeguarding ethics, confidentiality and data protection
- ✓ Ability to assess the significance, credibility and limitations of findings
- ✓ Commitment to the quality, learning value and use of research findings

INDUCING ENVIRONMENT

KEY COMPETENCIES AT THIS STAGE – essential for using the findings

- ✓ Independence, integrity and ethical conduct
- ✓ Commitment to the quality and use of evaluation findings
- ✓ A learning-oriented organisational culture, recognising that impact assessment is also a social and political practice
- ✓ Understanding that impact assessment is not only about collecting data, but about producing well-founded conclusions that support decision-making, learning, accountability and change
- ✓ Seeing impact assessment not as criticism of someone's work, but as an integral part of the public policy cycle