Exploring UEval Through Case Study:

A Community-Engaged and Pedagogy-Informed Evaluator Education Initiative

by

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Abstract

The globally increasing need of evaluators implies a growing demand for effective evaluator education that aims to increase the competency gains of its learners to prepare them for effective evaluation practice. Research about the role of pedagogies in evaluator education towards enhancing learner competency gains is rarely discussed. UEval 2019 was a one-week, in-person and community-engaged evaluation institute at the University of Alberta. UEval brought learners from community and university together to co-create evaluation plans for seven community-based, real-life and diverse cases. The purpose of this multiple-methods case study is to explore UEval learner experiences related to competency gains and understand the role of UEval pedagogies in informing them. All study data were secondary, including the quantitative source of 45 self-assessment questionnaire. The questionnaire items comprised of the 36 Canadian Evaluation Society professional evaluator competencies divided into five competency domains. The results from the descriptive and inferential statistics revealed that the effect of time on these perceived learner competency gains was statistically significant. The secondary qualitative data were comprised of 44 learner final reflections and a focus group with seven facilitators. The following four case themes emerged: (a) learning with and from one another, (b) learner perceived competency gains, (c) learners modeling community-engaged evaluation practice and (d) learners building their evaluation capacity. I situated the findings within the context of current scholarship to understand the similarities and unique aspects of UEval to other evaluator education initiatives. The subsequent three case learnings emerged from the case themes: (a) group process is essential for practical evaluator education, (b) the interdependence of diverse perceived learner competency gains in practical evaluator education, and (c) relevant and multiple pedagogies enrich the group process in practical evaluator education. Uniquely, the

combination of the three pedagogies of UEval, experiential co-learning, community-engaged, and competency-based approach enriched the learner activities and aligned them with the relevant course outcomes of perceived professional competency gains and community-engaged co-creation. The insights from the study will contribute to teaching and scholarship in evaluator education, the professionalization of evaluation and the understanding of organizational evaluative needs of participating community partners.

Preface

This thesis is the original work of Ana Karbabian. This research project received research ethics approval from the University of Alberta Research Ethics Board; project name “Evaluating an Innovative Model of Experiential Co-learning,” Pro00090927, April 9, 2021.

"It startles us all to find our perplexities in the lives of others."
Robert Stake, *The Art of Case Study Research*

"Evaluation is like a box of chocolates. You never know what you're going to get." It was the afternoon of our first day in our case study groups. We went around the room, one by one, introducing ourselves and filling in the sentence "Evaluation is like....". In the moment, Forrest Gump's famous words seemed like the perfect metaphor to describe my feelings about the evaluation journey I was about to embark upon and for so many reasons still seems to ring true for me."
UEval 2019 participant

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Chapter 1: Introduction

This chapter delineates the key aspects of the study, such as its rationale, purpose and contribution to the evaluation field. In the first part of the chapter, I introduce societal evaluative needs and scholarly gaps informing the need for effective evaluator education towards preparing competent evaluators in community contexts. I also discuss the emerging understandings of effective evaluator education as training that prepares evaluators for effectively engaging in professional practice. Specifically, the role of competencies, values and course pedagogies in informing case-based learning as a course activity, and learner competency gains as a course outcome. As well, I share the purpose of this study and research questions from the discussed gaps. In the second part, I will describe the study case, UEval 2019, an evaluation institute at the University of Alberta, its participants, time and place alongside its pedagogies, activities, and outcomes. Lastly, I share my positionality, or my personal views on research and teaching, that influenced this study and end the chapter with a thesis overview.

The Global Need for Training Competent Evaluators

The growing global demand for competent evaluators has been attributed to the increased health and social programs, practices, and policies in need of evaluation (Boyce & McGowan, 2019). In a COVID-fatigued world rife with historical and contemporary societal inequities (Gullickson, 2020; Neubauer & Hall, 2020), higher education institutions are called upon to build the evaluation capacity of university students and community partners for conducting effective and socially responsible evaluation (Janzen et al., 2017; Kajner, 2013). Evaluation Capacity Building (ECB) can be defined as enhanced learner competency gains through increased evaluative knowledge, skills, and attitude (Labin, 2014). Indeed, recent scholarship shows the significant societal need for evaluation training. For instance, university students have

expressed the need for hands-on evaluation training that will provide them with workforce relevant competencies as future evaluators (Boyce & McGowan, 2019; Gokiert et al., 2017). Likewise, the evaluative focus of some organizations, globally, is more on accountability for funders to sustain their ongoing programs and less on staff professional development or program improvement (Boyce & McGowan, 2019; Rogers et al., 2019). Therefore, the staff of community-based organizations seek relevant learning opportunities because the burden of most organizational evaluation falls on individuals unequipped for their evaluative roles (Janzen et al., 2017; Suiter et al., 2016). These evaluative gaps suggest the need for evaluator training that is effective in preparing learners for professional practice.

The historical lack of research about the many aspects of evaluator education currently persists, including the lack of a unified definition of evaluator education (King & Ayoo, 2020; LaVelle et al., 2020; Nowariak, 2014). King and Ayoo (2020) differentiate evaluator education as a sub-type of evaluation education specializing in preparing learners to be evaluators. Some research (Chouinard et al., 2017; Gullickson, 2020) has indicated that data guided discussions about the interdependence of evaluation practice and evaluator education are few. Similarly, other research (Boyce & McGowan, 2019; Gullickson et al., 2019; LaVelle et al., 2020) pointed out that data guided conversations about the theoretical and practical aspects of the course pedagogy that contribute to teaching, learning and competency gains are rare. Poth et al. (2020) study is one such pedagogy-informed example from the Canadian evaluation context. The authors employed Canadian professional competencies as intended course outcomes and measured self-assessed learner perceived changes as evidence of learning. Considering that the instructor's pedagogy guides the many elements of the course design, delivery and assessment (LaVelle et al., 2020), this lack in scholarship is surprising and pressing (King & Ayoo, 2020;

Poth et al., 2020). Accordingly, studying the case of an evaluator education initiative like UEval, a one-week evaluation institute at the University of Alberta, will contribute to further understanding the role of pedagogies in informing learner experiences related to competency gains. That is, the study aims to provide evidence that UEval was effective in developing professional Canadian evaluator competencies.

Informing Emerging Understandings of Effective Evaluator Education

Many evaluation courses described in the literature have definite course outcomes, although only few initiatives employ a competency-based approach explicitly. Competency-based approach to evaluator education is valuable and relevant in informing evaluator education. That is, it offers exciting possibilities for effective education because of its close alignment with the professional competencies of evaluator member organizations (Gullickson et al., 2019; S.M. Johnson, 2018). Professional competencies have the dual role of informing evaluator education as well as the professionalization of the evaluation field (Garcia & Stevahn, 2020). Through competency gains, effective training can reduce the gap between the learner's pre- and post-training competency levels (Dewey et al., 2008) about how to conduct and use evaluations (Labin, 2014; Preskill & Boyle, 2008). Also, competency gains can enhance evaluative thinking as a component of ECB, when learners shift their mindset about the inherent significance of evaluation as a systematic inquiry (Buckley et al., 2015). The competency-based approach is showing promising outcomes towards preparing learners for their profession (Gullickson et al., 2019; S.M. Johnson, 2018; Poth et al., 2020) through ensuring that the current professional competencies are employed as intended course outcomes (Poth et al., 2020).

Values also inform evaluator education and the professionalization of the field. That is, while the instructor's values inform the pedagogy of the course (LaVelle et al., 2020), the values

associated with the evaluator and evaluand inform evaluation practice and professionalization (Gullickson & Hannum, 2019). Experiential, co-learning and community-engaged pedagogies enhance learner competency gains and can be used alongside the competency-based approach or vice versa (Bakken et al., 2014; Poth et al., 2020). Experiential, co-learning pedagogy means learners learn with *and* from each other, while working on practical cases. Social learning theory rooted in constructivism informs this pedagogy and posits that learning is inherently a social activity during which learners reflect on and apply their learnings (Farnsworth et al., 2016). On the other hand, the community-engaged pedagogy can be defined as learners working together as equals on community-informed cases (Janzen et al., 2017).

The recent rise in community-engaged scholarship has also coincided with the emergence of the community-engaged evaluator identity of working alongside stakeholders as a co-creator (Janzen et al., 2017; Shulha et al., 2016). This evaluator role addresses the current societal need for community-engaged evaluations (Janzen et al., 2017; Teitelbaum, 2020). The co-creator role focuses on the moral, relational, contextual, and political aspects of evaluation, in addition to the technical (Bakken et al., 2014; Janzen et al., 2017). These multifaceted aspects of evaluator identity imply the need for an effective and value-laden evaluator education through relevant pedagogies. Therefore, the effective evaluator education also prepares evaluators for effective professional practice through equipping them with practical and contextual knowledge and skills needed in community contexts (Gokiert et al., 2017; Nowariak, 2014). In doing so, it addresses the apparent lack of modeling the complexity of real-life evaluation situations in classroom learning (Mignone et al., 2018).

Case-Based Learning

The experiential, co-learning and community-engaged pedagogies inform community participation in case-based learning, one of the main UEval course activities. Practical, case-based learning is a type of simulation learning that mostly takes place in the classroom (Nowariak, 2014). Case-based learning includes real-life evaluation cases and community members from community organizations as part of student learning (Bakken et al., 2014; Mignone et al., 2018; Suiter et al., 2016). The community coming to the classroom for reciprocal, case-based learning strongly models real-life contexts (Bakken et al., 2014). As well, this type of learning can prepare evaluators adequately for practice because it enhances interpersonal and situational competencies essential for professional practice, but hard to foster in the classroom (Davies & MacKay, 2014; Dewey et al., 2008; Galport & Azzam, 2017; S.M. Johnson, 2018; Nowariak, 2014). Garcia and Stevahn (2020) emphasized the centrality of competencies in the situational and interpersonal domains in informing a holistic evaluation practice, such that the evaluator's "ability to appropriately understand the evaluation context and skillfully interact with a variety of stakeholders … may be key to enacting methodology" (p. 110).

Despite the significant pedagogical role of competencies in informing evaluation practice and evaluator education (Garcia & Stevahn, 2020), there are only a few evaluator education initiatives that employ competency-based approach and adopt professional competencies as formal course outcomes (McShane et al., 2015; Poth et al., 2020). The recent literature on evaluator education provides examples of practical and collaborative learning opportunities that positively influence learner competency gains (Kaye-Tzadok & Spiro, 2016; Mignone et al., 2018; Nowariak, 2014; Suiter et al., 2016). In contrast, other authors describe evaluation

pedagogies that will contribute to learner competency gains (Bakken et al., 2014; Oliver et al., 2008). However, their conclusions of how the course pedagog(ies) contribute to learner experience and competency gains are theoretical and not data driven (LaVelle et al., 2020; Oliver et al., 2008). Therefore, the field would benefit from a more fulsome description of the underlining pedagogies for a competency-based approach to evaluator education that results in competency gains.

The Purpose for this Research

The purpose of this research is to describe a case, UEval 2019, an evaluation institute at the University of Alberta, Canada, bounded by specific time, people and places to contribute to our understandings about how to design, deliver, and assess effectiveness in evaluator education. A case study approach is appropriate for this study to achieve the purpose of describing the study phenomenon within its context, while also framing the UEval 2019 case boundaries by its place, time, and people. The study participants were comprised of the UEval learners and facilitators. All the data used in this study was secondary and already collected through a larger study. To generate a comprehensive description of the case we drew upon the secondary analysis of qualitative and quantitative data sources generated as part of the course. Accordingly, the learners' perspectives of competency gains and experiences was complemented with a post-course focus group with course facilitators. To create the case description, the study phenomenon brought together learner experiences with their competency gains. Specifically, to explore how the experiential-learning, community-engaged and competency-based pedagogies of UEval informed these-learner experiences related to perceived competency gains.

The quantitative and qualitative methods of the study helped provide diverse perspectives towards describing the case and answering the research questions below (Hammond, 2005).

A quantitative pre-post questionnaire was used to identify perceived changes in professional competency gains, while qualitative methods were used for a detailed understanding of the pedagogies that may have contributed to learner experiences related to perceived competency gains. The professional competencies employed were the evaluator competencies of the Canadian Evaluation Society (CES, 2018). I employed descriptive and inferential statistics to understand the changes in learner perceived professional competencies, while I also derived case themes through an iterative process common in qualitative research.

The overarching research question guiding this study was the following: What can the learner perceived competency gains and experiences tell us about the instructional pedagogies used in the UEval course? Two sub-questions were explored: What gains in competencies do UEval learners report at the end of the course? (quantitative). What unique pedagogical features do UEval learners and facilitators describe as influencing learner experiences and competency gains? (qualitative).

Research Case: UEval

Background: Development and Steering Committee

UEval took place at the University of Alberta from June 3-7, 2019, with learners attending from the community and university (Gokiert et al., 2021). A total of 52 learners participated in UEval, including 17 community learners, 31 university students and four auditors. UEval was developed and piloted in response to identified community and university needs for evaluation capacity building opportunities in Alberta. The institute is partially modeled after the Summer Institute in Program Evaluation at the University of Manitoba. Aligning its curriculum with CES competencies, UEval included blended learning comprised of online pre-learning followed by a week of classroom instruction. The UEval curriculum was the result of the

learning advisory committee co-creation among community members, university faculty and the local evaluator member organization.

Another unique aspect of the course included inviting community partners to the institute to co-create evaluation plans of community-based cases alongside graduates, undergraduates, auditors, and open studies students to bridge the capacity gap in evaluation between university and community (Gokiert et al., 2021). The intersectoral community learners represented local community-based organizations from the public and private sectors. The learning advisory committee selected seven case studies from the participating organizations as relevant to the needs of the learners and outcomes of the course. These case studies apprised the case study group work with the goal of learners collectively co-creating a final evaluation plan. The case study topics were diverse from care of seniors, campus food security, early childhood development, adult literacy and public washrooms. See also Gokiert et al. (2021) for a detailed description of the background and development of UEval 2019.

Underpinning Pedagogies

Through its competency-based, experiential, co-learning, and community-engaged pedagogies, UEval provided a unique capacity building opportunity. UEval also used community-engaged co-creation between university students, university faculty and community stakeholders as a model that enhances learning. The community-engaged as well as experiential, co- learning pedagogy rooted in constructivism positioned learners and instructors as equal co-creators (Bhola, 1998) on experiential and community-based cases. Therefore, these pedagogies and activities allowed for the application of evaluation theory to practice in learning (Farnsworth et al., 2016). Specifically, UEval brought the community and their cases to the classroom to foster experiential, collaborative and peer-to- peer co-learning. In doing so, it led to reciprocal

co-creation between the academia and the community, beyond the traditional one-way academic outreach. In this context, when interdisciplinary and intersectoral learners meet to co-learn around community-based cases, they bring diverse perspectives about complex problems. These foster overarching ways of thinking and provide opportunities to generate new understandings of evaluation theory in practice. Therefore, the combination of these pedagogies enhances learner competency gains and prepares UEval leaners for evaluation practice in the community context.

Intended Course Outcomes. Eight intended course outcomes listed below were articulated in the course syllabus. These outcomes aligned with several of the CES competencies:

- Articulate the basic principles of evaluation in a community context.
- Describe general concepts, models, and applications of evaluation in a community context.
- Develop evaluation plans for different evaluation purposes in a community context.
- Articulate the benefits and limitations of different evaluation methodologies in a community context.
- Engage stakeholders when co-creating an evaluation plan in a community context.
- Formulate and present an evaluation framework within a community context.
- Recognize and critically examine ethical issues when planning an evaluation in a community context.
- Describe how to disseminate evaluation data to support knowledge mobilization in a community context.

Delivery and Course Assessments

Blended Learning. UEval provided online instruction opportunities of four modules, two weeks prior to the in-class week (Gokiert et al., 2021). The blended curriculum was based on a recognized need for a classroom learning environment that was less didactic and more engaging. Learners completed four interactive online modules through e-class, a Moodle learning service. Online modules were hosted on a web-based platform, ISeazy. These modules provided learners with a foundational understanding of evaluation theory and practice to prepare them for the in-class sessions. To further enhance their learning, the learners completed interactive quizzes at the end of each module, as well as participated in online discussion forums about each module. The content of the modules was tailored to meet the varied learner needs, since UEval learners possessed differing levels of evaluation knowledge or experience.

The intended outcomes for each of the modules and articulated in the course syllabus can be seen in table 1.

Table 1

Pre-Institute Online Learning Modules

Topic	Content
Module 1: Introduction to Evaluation	Goals, types, general concepts, models, and applications of evaluation
Module 2: Developing an Evaluation Plan	Theory of change, logic models, role of evaluators, and ethics
Module 3: Collecting Data for Evaluation	Qualitative and quantitative approaches to data collection, data analysis, and ethics
Module 4: Using Evaluative Data & Knowledge Mobilization	Types of use, evaluative implementation and reporting strategies, and dissemination

Classroom Learning. The institute instruction involved a mix of didactic lectures alongside experiential activities in the mornings and facilitated case-study group work in the afternoons (see Figure 1) (Gokiert et al., 2021). “In the mornings, the co-instructors delivered

lectures complementing the pre-institute online modules and prepared learners for their case-study activities. Experiential learning exercises followed; in pre- assigned groups, students co-constructed knowledge, sharing ideas of how lecture content applied to a local, multi-stakeholder

Figure 1

UEval at a Glance

***UEval*: Institute at a Glance**

Course Objectives

By the completion of the course, learners will be able to:

- Articulate the basic principles of evaluation in the community context
- Apply appropriate evaluation designs to different evaluation purposes in a community context
- Engage stakeholders when creating or co-creating an evaluation plan in a community context
- Formulate and present an evaluation framework within a community context
- Recognize critical ethical issues when planning an evaluation in a community context

Pre-Institute Learning Modules (via eClass) May 20 – June 2, 2019			
Module 1: Introduction to Evaluation	**Module 2:** Developing an Evaluation Plan	**Module 3:** Collecting Data for Evaluation	**Module 4:** Using Evaluative Data & Mobilizing Knowledge

Classroom Learning (Faculty of Extension) June 3 – June 7, 2019				
	Plan (1) Engaging stakeholders & vulnerable populations (2) Evaluation purpose, approach, and type (3) Ethics		**Do** (1) Evaluation methods (2) Data collection (3) Ethics	**Use** (1) Knowledge mobilization (2) Using evaluative data (3) Ethics	**Share** (1) Group presentations (2) Peer feedback (3) Student evaluations (4) ECN reflections
	Day 1: Stakeholder engagement	**Day 2: Evaluation process**	**Day 3: Methods & Data collection**	**Day 4: Knowledge mobilization**	**Day 5: Presentations**
8:30am–12pm	Lecture & Activities	Lecture & Activities	Lecture & Activities	Lecture & Activities	Group work & Presentations
12-1pm	Lunch	Lunch	Lunch	Lunch	Lunch
1-4:30pm	Activity & Introduction to case studies	Activity & Group work on case studies	Group work on case studies	Group work on case studies	Presentations & Evaluation
5-7pm	Public keynote event on evaluation				
	Assignments due by 4pm on Friday, June 28th, 2019				

illustrative case study used throughout the week." (p.287).

Each case study team was comprised of a total approximately eight participants, including six learners, a facilitator and one or two key informants (Gokiert et al., 2021). The facilitator guided them through the consensus building and co-creation of the final evaluation framework with other learners and the key informants. Some of the key informants, who provided learners with the needed answers about the context of the case, were also enrolled in the institute as learners. Similarly, to help them stay on track with their tasks, the groups used a

student handbook to guide their group activities and discussions. Upon course completion, each participating organization received an optimized version of a final evaluation plan put together from the plans of several learners from each case study group.

Learner Assessments. The UEval learners completed several graded assessments prior, during and after the institute (Gokiert et al., 2021). The pre-institute activities and assessments included learners introducing themselves through on-line postings and responding to two other introductions, in addition to responding to their classmates after each module. The learners completed a pre- and post- CES professional competency questionnaire at the beginning and end of the course. On the last day of the institute, all seven case study groups prepared a 20-minute final presentation about that served as the basis for the final evaluation plan assignment. The same day, learners completed a peer assessment about each other's participation in group work throughout the week. UEval learners also submitted a 1,500-word individual written reflection about their experiences and learnings of the course, within two weeks post-institute. For the final evaluation plan, the learners were permitted to work individually or in smaller groups of two or three to adjust their case study group work, as they saw fit. The final evaluation plan comprised the most weighted assessment of the course.

Positionality of my Triple Roles

In this study, my research orientation alongside my multiple roles with UEval as a learner, researcher and a co-facilitator furthered my interest in this study and informed my positionality. I participated as a learner in UEval 2019 and as a graduate research assistant and a co-facilitator in UEval 2020 and 2021 online deliveries. The researcher's worldview includes their epistemology and ontology, or assumptions about knowledge and the world (Mills et al., 2006). Through my transformative lens, I perceive research and evaluation as opportunities for

social change and inclusion. As an individual and a qualitative researcher, my transformative worldview intersects with UEval's community-engaged and constructivist theoretical frameworks. Constructivism centres on the negotiation of meaning or perception as an inherent part of human existence (Lincoln, 2003). Therefore, I subscribe to the constructivist and case study approach's understanding of the researcher as an instrument (Tracy, 2010). As well, I agree with the constructivist and case study approach's understanding of the role of the researcher as a close collaborator with participants to tell their stories (Baxter & Jack, 2008). Also, since the subject of my thesis is an educational initiative, it is apt to mention that I view educational interactions as value-laden social and pedagogical activities.

The constructivist understanding of the researcher as instrument means that my strengths and biases have informed the research process (Tracy, 2010). These various UEval roles and my background as a qualitative researcher helped me bring a rich insider's perspective that benefited my qualitative research. Equally, these roles and my familiarity with the case did not allow me to "put aside [my] many presumptions" (Stake, 1995, p. 1), and may have introduced bias that would not have been present otherwise. The bias possibly positioned me as extremely close to the data with preconceived, instead of generated, meanings. To reduce it, I memoed the experiences of my readings and my emerging understandings of the data. As well, I chose inductive data analysis and multiple methods to help me understand in depth the participants' meanings. Despite these strategies, meaning making in qualitative inquiry remains multilayered, nuanced and messy.

Finally, this thesis writing has helped me examine my own convictions and biases around the profession of evaluation. Despite my immediate fascination with evaluation, the professional role of passing judgement on a program orchestrated by other humans also implied

opportunities for professional misuse (Guba & Lincoln, 1989). My mindset about evaluative judgment has shifted after reading many of the sources I used for this thesis, as I came to synthesize my own conclusion about evaluation practice. Much like the responsibility of assigning meaning to the words of others in qualitative research, now I perceive evaluative judgement as a professional, sociopolitical and cultural responsibility that relies on a host of competencies and values.

Thesis Overview

After this introductory chapter, in chapter two, I will situate the need for my study within relevant evaluator education literature. In chapter three, I will describe the case study approach including its suitability for addressing my research questions and the participants and procedures involved in the secondary analysis. In chapter four, I will present my case description drawing upon the qualitative and quantitative findings. In chapter five, I will discuss my case assertions derived from my findings considering relevant literature to address my research questions. Lastly, in chapter six, I will advance important theoretical and practical implications from this study for evaluator education as well as discuss study limitations, future directions, and conclusions.

Chapter 2: Review of Literature

The purpose of this literature review is to situate this research study in relation to the current scholarship on evaluator education and evaluation practice. In the first part of this chapter, I will discuss the components and outcomes of effective evaluator education, which prepares learners for evaluation practice through competency gains. I will finish the first part by discussing the current literature on the three promising pedagogical approaches used within UEval: experiential co-learning, community-engaged, and competency-based approach. I will then discuss how aspects of these pedagogies have been used previously in evaluator education. In the second part of the chapter, I will discuss the professionalization of the evaluation field, mainly evaluation capacity building. I will continue by discussing changing values influencing the professionalization of the evaluation practice and highlight the evolving nature of the evaluator identity from an expert to a community-engaged co-creator. Hence, emphasizing the need for evaluator education to prepare learners for professional and community-engaged practice. I will conclude the chapter by emphasising the need for this study.

Effective Evaluator Education

Evaluator education is one way to increase capacity and prepare competent and motivated practitioners and scholars (Gullickson et al., 2019; S.M. Johnson, 2018). The unregulated nature of evaluation practice in most jurisdictions reinforces the need for competency-based credentialing through effective evaluator education (Davies & Mackay, 2014; Gullickson et al., 2019; S.M. Johnson, 2018). Even trained evaluators face complexity in their work, with a required focus on stakeholder needs and ethical practice (Gullickson et al., 2019; S.M. Johnson, 2018). In its simplest form, effective training can be summarized as “a plan of action to advance someone's learning” (Gullickson et al., 2019, p. 25). Evaluator education can be considered

effective if its activities, outcomes, and pedagogies align with learner needs for competency gains (Gullickson et al., 2019; LaVelle et al., 2020). In evaluation practice, these translate to enhanced learner competency gains relevant to the learners' professional practice (see Chouinard et al., 2017; Galport & Azzam, 2017; Gullickson et al., 2019; S.M. Johnson, 2018).

At the individual level, evaluation capacity building can be defined as competency gains of learners in evaluation knowledge, skills, and attitude (Kaye-Tzadok & Spiro, 2016; Labin, 2014; Preskill & Boyle, 2008). Crucially, learner competency gains need to be accompanied by the practical discernment and astuteness of when, where and how to coordinate efficiently one's professional competencies (Chouinard et al., 2017; Galport & Azzam, 2017). That is, to equip learners to manage current workplace expectations and demands successfully (Davies & Mackay, 2014; Galport & Azzam, 2017). Similarly, it aims to introduce learners to their respective professional organization and standards and socialize them into the profession (Davies & MacKay, 2014; Gullickson et al., 2019). To conclude, effective evaluator education prepares learners in alignment with learner needs, professional competencies, and employer expectations (Dewey et al., 2008; Galport & Azzam, 2017; Gullickson et al., 2019; S.M. Johnson, 2018).

Pedagogies Informing Evaluator Education

In evaluator education, a common pedagogy that addresses evaluator education needs and concerns is not tenable because the discipline is transdisciplinary and highly contextual (LaVelle et al., 2020; Nowariak, 2014). Poth et al. (2020) employed the Context, Input, Process, Product systems level evaluation to elaborate on the contextuality of evaluator education. Since evaluator education is contextual, the instructor's employed pedagogies, activities and assessments are unique to each course (LaVelle et al., 2020). Like evaluation and evaluation capacity building, every evaluator education initiative resides in a unique context or system,

therefore reflecting the values of the instructor, institution, and even diverse professional affiliations (Boyce & McGowan, 2019; King & Ayoo, 2020). Scholars agree that evaluator education centres on value-laden pedagogies that inform teaching and learning (King & Ayoo, 2020; LaVelle et al., 2020; Poth et al., 2020). Understanding values is significant because they help contextualize evaluator education (LaVelle et al., 2020) as well as inform evaluation practice (Garcia & Stevahn, 2020). The values of the instructor influence their choice(s) of pedagogy and the resulting course design, delivery and assessment (Lavelle et al., 2020).

One definition of pedagogy in the context of evaluator education is "the philosophical and empirical decisions that instructors make when teaching evaluation" (Lavelle et al., 2020, p. 1). Pedagogy includes what and how behind teaching the learners (LaVelle et al., 2020). The what is comprised of the environment in which teaching, and learning occurs as well as the instructor's intentions towards the course content, or the intended curriculum (King & Ayoo, 2020). A few of the common topics taught include introduction to the field, data collection and analysis methods, evaluation theory, evaluation practice, and ethics (LaVelle et al., 2020). On the other hand, the how implies the instruction of the curriculum that can be employed to strategically target course delivery, or teaching and learning activities, experiences as well as environments (King & Ayoo, 2020; LaVelle et al., 2020). The instructor's choice of learning activities as pedagogical tools influence student interactions in the classroom (LaVelle et al., 2020). Learning activities can be defined as how the instructor perceives the pedagogy unfolding in the classroom. Mainly, they need to deliberately align with the instructor's chosen course pedagogy and outcomes (LaVelle et al., 2020). Depending on their worldview, some instructors may perceive learning as an experiential and co-learning activity to enhance the learners' experience with their peers and environment (LaVelle et al., 2020; Poth et al., 2020), therefore,

emphasizing the use of certain activities in the classroom over others. Also, course assessments play a significant role in apprising the instructor about the extent of student learning (LaVelle et al., 2020; Poth et al., 2020). The instructor can also employ course assessments as a data collection tool for changes in leaner competency gains (Poth et al., 2020). For instance, in some initiatives, instructors used the final evaluation plan as an assessment tool for multiple learner competency gains (Gokiert et al., 2021; Mignone et al., 2018; Poth et al., 2020; Suiter et al., 2016).

E. Wenger-Trayner[1]'s (2013) social learning theory and its constructivist roots serve as the foundational theoretical framework that informed the UEval curriculum design and delivery. Through a social learning theory lens, learning is viewed as a social rather than an individual process. E. Wenger-Trayner (2013) postulated that the learner's negotiation of the meaning of their participation in relation to other learners is an inherent activity of social learning. Constructivism emphasizes the existence of multiple realities because individuals construct their own perceptions or meanings of events (Charmaz, 2006). Therefore, humans continuously try to understand and negotiate their experiences through assigning meaning to them (Guba & Lincoln, 2001). Consequently, learners exercise meaning making by aligning their new learnings with their own pre-existing knowledge and applying them to their current context (Farnsworth et al., 2016). As such, the focus of social learning is learner participation, engagement and reflection to enhance the meaningfulness of learner experience and camaraderie (Buckley et al., 2015). Below I will provide examples of the three pedagogies that have intersected with effective evaluator training in the literature: the competency-based approach, experiential, co-learning, and community-engaged.

[1] E Wenger and E-Wenger-Trayner mentioned in the text and references refer to the same author

Competency-Based Approach. Despite the role of competencies as a common framework in evaluation practice (Poth et al., 2020), not many scholars have studied competency-based evaluator education (McShane et al., 2015; Poth et al., 2020). A competency-based approach includes the instructor's use of professional competencies as intended course outcomes, with the expectation of gradual learner gains of these competencies within a specific timeline (Poth et al., 2020). The professional evaluator competencies comprise a framework of technical knowledge, "methods of inquiry, and accepted procedures" (Dewey et al., 2008, p.270). Over the past few decades, evaluation practice and professionalization have evolved from methodological and technical characterization to relational (Dewey et al., 2008). This shift has called for a stakeholder-centred evaluator stance informing their evaluation practice. Mainly, that the evaluator possesses respect and intercultural competence to be inclusive of traditionally marginalized groups (Dewey et al., 2008). Professional competencies can take on the dual roles of representing current professional standards, but also serving as a pedagogical framework for evaluator education (Garcia & Stevahn, 2020). As such, they constitute a common and evolving framework for evaluators, educators, and employers (CES, 2018; Galport & Azzam, 2017). Therefore, one description of effective evaluator education can be competency-based and aligns with the evolving professional competencies (Davies & MacKay, 2014; Dewey et al., 2008; Garcia & Stevahn, 2020). Choosing this approach does not exclude the need for a relevant pedagog(ies) to guide instruction. For instance, Poth et al. (2020) mentioned adopting experiential and adult education pedagogies alongside the competency-based approach. Scholars agree that a comprehensive working knowledge for evaluation practice hinges on the intersection of a myriad of personal and professional factors, including the development and use of competencies (Lee et al., 2007; Shulha et al., 2016). Professional evaluation organizations, such

as the American Evaluation Association (AEA, 2018), have assigned professional evaluator competencies as a step towards professionalization. In Canada, CES is the professional organization of evaluators that focuses on the professionalization of the field nationally (CES, 2014). CES originally compiled professional evaluator competencies in 2010 and revised them in 2018 (CES, 2018). The 36 CES competencies are divided into five competency domains: reflective practice, technical practice, situational practice, management practice and interpersonal practice. The articulation of these competencies was used towards informing the voluntary professional designation of the Credentialed Evaluator in Canada (King, 2015). Significantly, CES was the first professional organization to create and administer a professional credential for evaluators (King, 2015). Japan and Thailand are the two other jurisdictions, globally, that oversee a monitored professional evaluator designation for external school evaluators (Gullickson et al., 2019). Evaluation practice relies on the interaction with stakeholders and real-life cases (Nowariak, 2014). Therefore, an ongoing call exists in the literature about the need for practical training opportunities targeting interpersonal and situational competency gains (S.M. Johnson, 2018; Lee et al., 2007; Nowariak, 2014). The scholarly focus on these practical competency domains is because of the "practical wisdom" (House, 2015), "sixth sense" (Stevahn & King, 2016) or "soft skills" (Suiter et al., 2016) that evaluators need in the workplace, but may not often be practiced or learned in a classroom setting (S.M. Johnson, 2018).

Experiential, Co-learning Pedagogy. Research shows that, hands-on, experiential co-learning enhances learner engagement in evaluator education (Boyce & McGowan, 2019; Darabi, 2002; Kaye-Tzadok & Spiro, 2016; Oliver et al., 2008). Experiential education entails the purposeful engagement of learners in activities directly related to their learnings (Association for Experiential Education [AEE], n.d.). For instance, the instructor can employ problem-solving

and application to enhance the taught concepts using simulated or real-life cases (Lavelle et al., 2020; Oliver et al., 2008). This necessitates active and reflective learners who take ownership of or engage in their learning experience (AEE, n.d.; Darabi, 2002; Lavelle et al., 2020). Participating in discussion with their peers is one way that the learners can understand, process, and make sense of their learnings (AEE, n.d. Bakken et al., 2014). In this context, the instructor needs to be comfortable taking on the role of a facilitator and a fellow co-creator rather than a conduit of knowledge and expertise (Bhola, 1998). Therefore, facilitation and experiential co-learning in teaching of evaluation empowers learners to think through and discuss their learnings independently, while also seeking the instructor's guidance or expertise when needed (Mignone et al., 2018; Nowariak, 2014; Oliver et al., 2008).

Experiential learning inherently relies on co-learning or learners collectively learning from and with one another (AEE, n.d.). In constructivist capacity building, co-learning means learners construct new knowledge and apply it to their context (Bhola, 1998; Buckley et al., 2015). Constructivist co-learning emphasizes an egalitarian co-creation and learning partnership that values the input of all participants as equal (Bhola, 1998; Farnsworth et al., 2016). In an evaluation course with similar teaching activities as UEval, Suiter et al. (2016) provided applied learning opportunities for learners and highlighted these real-life case studies and community partners of varied expertise as key contributors to enhanced learning.

Community-Engaged Pedagogy. Community-engaged pedagogy enhances the experiential, co-learning activities through community partners and university students co-learning as equals on community-based cases. In examples of evaluator education that is community-engaged, participating stakeholders from the community join the classroom as "interdependent co-learners and co-investigators" (Suiter et al., 2016, p. 553) working on

community-based cases (Bakken et al., 2014; Mignone et al., 2018; Oliver et al, 2008). The attendance of community partners in the training ultimately contributed to mutual capacity building of community and university through reciprocal learning. The goal of these courses is mutual capacity building through university students and community learners offering their expertise during the co-learning process (Janzen et al., 2017; Mignone et al., 2018; Suiter et al., 2016). In an evaluation course with a similar community-engaged pedagogy as UEval, Bakken et al. (2014) found that the community-engaged aspects of their curriculum led to reciprocal learning and enhanced learner gains because the classroom activities modeled the experiential skills necessary for effective evaluation practice. Equally, community partners had reciprocal opportunities in learning with and from the academic knowledge of students and faculty (Bakken et al., 2014). To conclude, the enrollment of community in evaluator education courses as co-learners builds their capacity through modeling for the learner's evaluation practice in the community context.

Through its community engaged pedagogy and the resulting community participation, UEval addresses the calls in the literature for incorporating values in evaluator education (Gullickson & Hannum, 2019; Lavelle et al., 2020; Thomas & Madison, 2010). Pedagogical values can influence the learner's values, which can then shape their understanding of the values of other individuals or groups (Gullickson, 2020). First, the choice for community-engaged values of UEval is timely because the equitable inclusion of stakeholders is an ongoing issue in practice (C.M. Johnson, 2015). One study (Sturges, 2011) concluded that evaluators perceived their professional role as an opportunity to contribute to social change. However, in a more recent study (C.M. Johnson, 2015), practicing evaluators reflected on their struggle and bias of privileging powerful stakeholders with vocal demands over others with lesser resources or

representation. Second, evidence about community-engaged pedagogy facilitating competency gains has been rarely mentioned in the literature. McShane et al. (2015) compared the competency gains of two groups of undergraduate learners enrolled in an evaluation course: one who interacted with community partners and the other with no such interaction while participating in the course. The authors found that the first group of learners demonstrated greater uptake of technical, situational, and interpersonal competencies than their peers in the second group. The study focused on these three competency gains because of their relevance to the course assignments. Community-engaged pedagogy in evaluator education is better understood when considering the evolution of community-engaged scholarship in academia.

Community-Engaged Scholarship. Traditionally, the epistemology of academia has been privileged, dominant and exclusive (Fear & Sandmann, 2016; B. Wenger-Trayner et al., 2019). Therefore, academics were considered the creators and conveyors of knowledge, while individuals from outside of academia were viewed as the receivers (B. Wenger-Trayner et al., 2019). In recent years, there has been a gradual move away from this exclusive academic epistemology to a more inclusive one. Due to the perceived benefits of engagement as a contributor to social transformation, democratic engagement efforts of higher education institutions have gradually increased in recent years (Janzen et al., 2017). Universities express democratic engagement as a wider institutional commitment to promote a public culture of democracy throughout academia and society (Kajner, 2013). Academics can incorporate democratic engagement through education and research with community-engaged approaches, otherwise known as engaged scholarship (Kajner, 2013) or community-engaged scholarship (Morrison & Wagner, 2017). Socially transformative values inform community-engaged scholarship as a way of thinking, doing, and engaging (Kajner, 2013). Community-engaged

scholarship revisits the traditional academic knowledge co-creation through knowledge democracy (Kajner, 2013). Therefore, socially transformative education and research provide opportunities for egalitarian knowledge co-creation.

According to Janzen et al. (2017) community-engaged scholarship needs to exhibit the following three characteristics. First, epistemologically, and ontologically the academics are respectful and attuned to the research needs of communities (Janzen et al., 2017; Kajner, 2013). Academics who practice community-engaged scholarship perceive community members as knowledge-rich partners who actively contribute and complement their theoretical knowledge (Janzen et al., 2017; Kajner, 2013). Therefore, when partnering with communities, academics need to exhibit a posture of humility and an attitude of continuous learning about the needs of the communities (Kajner, 2015). Traditionally, the experiential knowledge of the community was suppressed, in contrast to the institutionalized dominant discourse in government or academia (B. Wenger-Trayner et al., 2019). The second characteristic of community-engaged scholarship is employing participatory methods of engagement inclusive of community voices. As knowledge democracy informs community-engaged scholarship, the academic and experiential epistemes are no longer polarized (Kajner, 2013). The third characteristic includes the extent to which the engagement efforts of academics or universities espouse social transformation as their end goal (Fear & Sandmann, 2016).

Professionalization of the Evaluation Field

The professionalization of evaluation can refer to the ongoing development of professional competencies (Schwandt, 2018a). As well, the daily application of competencies and values in practice (Gullickson, 2020) that can inform the professional evaluator identity, as I will discuss

below. Similarly, evaluation capacity building can be influenced by current professional practice and standards, and in turn influences organizational evaluation (Labin, 2014).

Evaluation Capacity Building

Evaluation capacity building can be defined as an overarching and intentional process that aims to equip individuals and organizations to practice and use evaluation. Evaluation capacity building is imperative because of organizational and societal barriers to democratizing evaluation (Bakken et al., 2014; Janzen et al., 2017; Teitelbaum, 2020). Democratizing evaluation means increasing access to evaluation literacy and evaluative thinking, both necessary capacities in organizational evaluation (Cousins et al., 2014; Rogers et al., 2019). Janzen et al. (2017) refer to the significance and urgency of learner capacity building since the onus of most of the internal organizational evaluations falls on the shoulders of untrained staff. In some cases, these staff take on these imposed evaluative roles "with no prior knowledge or enough support" (Janzen et al., 2017, p. 163). Since these practitioners may comprise a large group at the societal level, then one indicator of successful capacity building initiatives is engaging them through evaluator education (Janzen et al., 2017). Therefore, addressing this need for ongoing evaluative learning means increased internal organizational capacity and less dependence on external evaluators (Sorrells, 2018).

External and internal drivers of ECB influence organizational evaluation influence how much time and effort the organization invests in evaluation and ECB (Labin, 2014). Teitelbaum (2020) discussed the way staff in organizations still view evaluation as onerous, "a necessary condition" to keep their programs running (p. 2). In an environment where community-based organizations compete for limited resources (Rogers et al., 2019), external drivers of ECB include the funder-focused agenda of accountability and demonstrating effectiveness of

programs (Rogers et al., 2019; Suiter et al., 2016; Teitelbaum, 2020). On the other hand, internal drivers for ECB included data driven program information, implementation, and improvement for community-based organizations (Rogers et al., 2019; Suiter et al., 2016). These often-competing demands imposed upon some organizations with limited resources, point to a larger need for building organizational evaluative capacity (Rogers et al., 2019).

ECB can take place through educational initiatives that "aim to increase the motivation, knowledge, skill, or structural resources" of individuals and organizations (Labin et al., 2012, p. 308). These initiatives rely on the strategic teaching and learning initiatives that build learner capacity (Preskill & Boyle, 2008). In other words, ECB builds individuals', groups', or organizations' capacity for effective and sustainable evaluation practice and use (King, 2007; Preskill & Boyle, 2008) to enable them to carry out their role and mission effectively (Linnell, 2003). The scope of successful ECB may intersect at one or more of these four interdependent levels: individuals, organizations, networks, and systems (Better Evaluation, n.d.). Theoretically, ECB at the individual level is followed by the learner's transfer of their learnings to their organizational context over time (King, 2007; Labin, 2014; Preskill & Boyle, 2008). Effective teaching and learning imply individuals transferring their built capacity only to the extent of their gains in knowledge, skills, and attitude (Kaye-Tzadok & Spiro, 2016; Labin, 2014; Preskill & Boyle, 2008). This evaluative capacity should be accompanied by relevant and feasible organizational resources and contexts, including supportive leadership and stakeholders (Labin, 2014; Volkov & King, 2007). Cousins et al. (2014) acknowledged that ECB unfolds in organizations with pre-existing environment and capacity to do and use evaluation. ECB intersecting between the organizational and network levels may be defined as influencing changes in the "structure, practice and process within and between organizations" (Compton et

al., 2008, p. 214). In addition, organizations reside within specific networks or communities as well as sociopolitical and economic systems that influence the former (Better Evaluation, n.d.). Understanding organizations or systems influencing organizational learning is relevant because organizational learning comprises the core of ECB (Labin, 2014).

ECB is highly context dependent (Stockdill et al., 2002) and rife with individual and organizational assumptions, expectations, and motivations about the role of evaluation and evaluation capacity building, as pinpointed in Labin's (2014) Integrated Evaluation Capacity Building logic model. Context sensitivity means tailoring ECB training programs for a specific audience based on the selection and implementation of ECB pedagogical strategies (Labin et al., 2012). The employed pedagogical strategies include the type, length, theory and mode of the training and can influence the fidelity of the pedagogical implementation and its training outcomes (Gullickson et al., 2019; Labin, 2014). Organizational ECB factors or mediators, such as the historical role of evaluation in the organization as well as the evaluation of ECB initiatives also influence the implementation of (Cousins et al., 2014; Labin, 2014). Like other evaluations, the evaluation of ECB initiatives includes a plan with specific measurable outcomes (Linnell, 2003; Volkov & King, 2007). ECB is also iterative, where the improved organizational evaluation practices and processes and increased capacity of staff or leadership foster the need for more capacity building (Compton et al., 2008; Labin, 2014). Therefore, ECB requires intentionality and contextuality in planning, implementation, and iteration. Evaluative thinking is an overarching concept of ECB that drives its needs and influences its outcomes (Buckley, et al., 2015; King, 2007; Patton, 2014).

Evaluative Thinking. Sustainable evaluation practice in organizations requires the embedding of evaluative thinking in their processes (Patton, 2014). Evaluative thinking is key to

effective and sustainable capacity building because it enables individuals to consider the why behind evaluation and how to sustain it (Janzen et al., 2017; Wade & Kallemeyn, 2020). Therefore, ECB initiatives should foster deliberate and ongoing organizational promotion of evaluative thinking (King, 2007). Evaluative thinking can be defined as an acquired set of critical thinking skills and worldview that guides individuals or organizations to seek evidence-based practice for program improvement (Buckley et al., 2015; Patton, 2014). Intrinsically motivated evaluation practice and use has been found to be one of the indicators of evaluative thinking (Bakken et al., 2014; Buckley et al., 2015; Suiter et al., 2016). In other words, evaluative thinking helps enhance appreciation for evidence to support specific desirable outcomes in program decision making (Patton, 2014). Alkin and Vo (2018) mention that is not uncommon for evaluators to find that evaluative thinking is a rare organizational occurrence. Like other human skills, evaluative thinking improves with further practice and, therefore, it is a time intensive exercise (Buckley et al., 2015; Patton, 2014). Although evaluative thinking gains can take place at the individual level, they can also be enhanced in a reflective, social learning process (King, 2007). Evaluative thinking and ECB can inform Another aspect of the professionalization of evaluation is its professional practice and identity.

Evolving Professional Practice, Values, and Identity

Learning as an activity contributes to certain aspects of the learners' identity (Farnsworth et al., 2016; LaVelle et al., 2020). Evaluator education contributes to the professional evaluator identity through learner gains of competencies and values during training (Gullickson, 2020; Poth et al., 2020). Equally, Nowariak, (2014) found the novice learners' self-perception of a professional evaluator identity through practical training at the Minnesota Evaluation Studies Institute. This constructed identity resides at the intersections of professional, socioeconomic,

and political influences during a specific historical timeframe (Schwandt, 2002). Therefore, this identity and its professionalization is in flux and influenced by a wide variety of factors, as discussed below.

Like researchers, evaluators have incorporated the academic episteme as their dominant professional epistemology (Archibald, 2020). However, over the past few decades, this stance has shifted with some evaluators embracing transformative values (Archibald et al., 2018). Although formerly overlooked in evaluation practice (Gullickson & Hannum, 2019), in recent scholarly discussions values are described as inherent to professional practice and evaluator identity (Garcia & Stevahn, 2019; Gullickson & Hannum, 2019; House, 2015). In current evaluation practice and evaluator education efforts, there is an overemphasis on methodology and reporting facts compared to the role of values (Gullickson & Hannum, 2019). Values serve as the biographical, cultural, social, academic, professional, and political filters of the evaluators' professional lens, through which they view and perform their roles in evaluation practice (Chouinard et al., 2017; Garcia & Stevahn, 2019; Gullickson, 2020; Gullickson & Hannum, 2019). Various evaluators perceive differently the role of values in their practice (Archibald et al., 2018) because value commitment depends on the philosophical paradigm of the evaluator (Archibald et al., 2018; Fox et al., 2017).

According to Program Evaluation Standards, acknowledging values or how values inform practice explicitly in practice provides opportunity for transparency and mutual learning between the evaluator and stakeholders (Yarbrough et al., 2010). Evaluators who associate themselves with the transformative paradigm incorporate transformative pedagogical approaches in their practice (Archibald et al., 2018) to encourage stakeholder engagement and evaluation use, beyond evaluative judgement (Janzen et al., 2017). One relevant definition of evaluation practice

is evaluative "judgement based on values" (Gullickson, 2020, p. 2). This means that the practice of evaluation goes beyond evaluative judgement about the merit, worth or significance of programs to embracing values as equally essential in informing evaluation practice (Gullickson, 2020). In addition to evaluator's values, other values are associated with the context and stakeholders of a program (Freeman & Vasconcelos, 2010; Gullickson & Hannum, 2019). To demonstrate the significance of values in evaluation practice, I will briefly share the findings of a study Garcia and Stevahn (2020) about the necessity of values in stakeholder-centred evaluation practice. The study focused on understanding how experienced evaluators used situational and interpersonal competencies in their daily practice (Garcia & Stevahn, 2020)

The authors interviewed 13 experienced evaluators and AEA members and identified sevens study themes. In addition to these themes, the study revealed three unexpected findings or dispositional elements that informed how these evaluators interacted with stakeholders and viewed their own professional evaluator identity. The first dispositional element included the participant evaluators' "deep commitment to serve programs well." This suggested that the participants perceived their professional roles as going beyond making judgement with stakeholders to helping programs and stakeholders through a "service-oriented mind-set." The second disposition was building trust with stakeholders. The third disposition was the evaluators' "humility as a learner" to understand stakeholders and their contexts, regardless of their years of experience. Therefore, values in evaluation practice implies the need for professional discernment alongside understanding evaluative contexts (Gullickson & Hannum, 2019). The evolution of evaluation practice in recent decades has resulted in a professional identity shift from the expert bystander to co-creator (Cook, 2020). To conclude, it can be implied from these

dispositions that the participating evaluators possessed egalitarian and empowering notions of stakeholders, like a community-engaged worldview.

Identity Shift from Expert to Community-Engaged Evaluator. As mentioned previously, the discipline of evaluation has gradually aligned with the epistemological and methodological changes that were ushered into community-engaged research (Archibald et al., 2018; Janzen et al., 2017). In practice, this has translated from a transactional expert-based approach with stakeholders to a relational or community-engaged one. The expert-based approach means that the evaluator communicates evaluative knowledge and skills as an external source of expert knowledge (Bakken et al., 2014). In this instance, the focus of the evaluator is more on the technical elements of the program and less so on the relational and contextual specifics (Janzen et al., 2017). On the other hand, community-engaged values with democratic ideals inform how evaluators perceive their professional role *and* the role of stakeholders as co-creators (Lund, 2015; Schwandt, 2018a). This, in turn, influences their method of interaction used with stakeholders to empower them (Butterfoss et al., 2001; Garcia & Stevahn, 2020).

This professional identity has come a long way from the first three generations of evaluators that focused on the concerns of managers rather than stakeholders (Guba & Lincoln, 1989). Unlike their predecessors, many fifth generation or current day evaluators view organizational staff as "co-responsible, competent" partners who contribute to the well-being of their organization (Lund, 2015, p. 4). This might help elicit a cooperative attitude of staff to volunteer relevant knowledge about their programs (Lund, 2015). Therefore, the community-engaged evaluation focuses on empowering stakeholders to reflect on their learnings and apply them to their current conditions and aims for social transformation (Bakken et al., 2014; Janzen et al., 2017). The relationship builder role allows the evaluator to use relationship and narratives

to examine and understand how the history of the community has shaped their present moment, including current programs and stakeholder participation, and how it might impact their future (Teitelbaum, 2020). One apt description of evaluators is those who "document history, assess progress as well as shape the future" (CES, 2016). To conclude, evaluation practice and evaluator education continuously inform one another, through competencies as pedagogy informing learning but also learning informing evaluation practice and professionalization.

Need for this Study

The study examined how the course pedagogies addressed the mutual capacity building of university students and community partners to prepare them for evaluation practice in the community context. Through engaging the community as co-learners in a university course, UEval addresses the lack of individual and organizational evaluation capacity in the community. Equally, through working on real-life, community-based cases and with community partners, it equips university students with practical and contextual knowledge and skills necessary in practice. As mentioned previously, the experiential, co-learning and community-engaged pedagogies were significant in complementing the competency-based approach of UEval. Understanding the extent to which certain competencies can be developed within the institute timeframe and experience is significant. Therefore, Canada would benefit from greater professionalization of the field of evaluation because it would increase organizational and individual efforts for ECB and evaluative thinking, while building professional practice and identity. The following guiding research questions will help address these gaps with a case study approach: What can the learner perceived competency gains and experiences tell us about the instructional pedagogies used in the UEval course? Two sub-questions were explored: What gains in competencies do UEval learners report at the end of the course? (quantitative). What

unique pedagogical features do UEval learners and facilitators describe as influencing learner experiences and competency gains? (qualitative).

Chapter 3: Case Study Methodology

The purpose of the methodology chapter is to provide adequate information for the study to be replicated. Data mostly relied on secondary analysis of learner final reflections, facilitator focus group and learner pre-post surveys. The data sources were brought together to generate a case description from which I hope to gain insights to guide evaluator education, mainly about the contributions of each of the three underpinning pedagogies to learner experiences and perceived competency gains.

Rationale for the Intrinsic Case Study

This study unit of analysis is the study case, UEval 2019, bounded by place, people and activities. My choice of a case study qualitative approach is apt because I am interested in understanding the study phenomenon, UEval learner experiences related to perceived competency gains, within the context of a case (Baxter & Jack, 2008). The pedagogies of UEval comprise the context surrounding this phenomenon. In a case study approach, the researcher reveals "the essence of the phenomenon" within its context because they may perceive those contextual conditions informing the study phenomenon (Baxter & Jack, 2008, p. 545). That is, they aim to understand and describe the "how" and "why" the phenomenon operates within its context (Baxter & Jack, 2008, p. 545). Although a case can have definite boundaries of a system, such as time and space, it can be dynamic and complex (Stake, 1995).

As a researcher, I am interested in both the uniqueness and commonality of UEval (Stake, 1995). My purpose of studying UEval is "particularization, not generalization," such as constructing a theory (Ridder, 2016; Stake, 1995, p. 8). That is, although my study might contribute to understanding the role of pedagogies in enhancing learner experiences and competency gains in evaluator education, my focus remains on the lessons that I can learn about

my phenomenon and the case (Ridder, 2016). Ultimately, my purpose is to understand the unique elements of UEval as a case and its similarities with other evaluator education initiatives (Ridder, 2016; Stake, 1995). The Sub-type of the UEval case study can be considered an intrinsic case study. Stake (1995) defines the researcher's intrinsic interest in the case as a characteristic of intrinsic case study (Stake, 1995), and as an emerging evaluation capacity building enthusiast, I was deeply interested in the case.

This study is part of a larger project that developed and implemented UEval and was funded through the Teaching and Learning Enhancement Fund at the University of Alberta. The larger project received approval from the University of Alberta Research Ethics Office (pro000090927). UEval learners provided their written consent to participate in the research study by completing and signing an informed consent form during the week of the institute. Seven facilitators and 45 of the 52 UEval learners provided consent for the study.

Case Participants

UEval's sampling is based on a convenience sample where enrolled learners and facilitators in the course were invited to participate in the larger study. As shown in table 2, the 45 UEval learners included different groups of learners from community and university.

Table 2

Participant Demographic Information

Learner Enrollment Type	n = 45	%
Community	17	37.77
University		
Graduate	22	
Undergraduate	4	
Auditors	2	
Total for University	28	62.23

All undergraduates were in their final year of study, while most of the graduate students were at the master's level, with few in PhD programs. The learners came from seven different faculties and 15 disciplines on campus. Examples included Anthropology, Human Ecology, Agriculture, Women and Gender Studies, Health Sciences, Earth & Atmospheric Sciences, Extension and Open Studies. Community learners represented local community-based organizations from the public and private sectors. The facilitators included three professors from the university, two senior graduate students with expertise in evaluation and one evaluation consultant. All the facilitators, except for one of the evaluation consultants, participated in the UEval Learning Advisory Committee.

Case Data Sources and Analysis

Case studies often draw upon multiple data sources and even perspectives to develop naturalistic descriptions of these bounded systems. UEval provided an optimal setting in which to do this.

Qualitative Data Sources

The case study approach aims to garner multiple viewpoints from different data sources to understand the phenomenon and case in depth (Baxter & Jack, 2008). The study case themes were generated using two qualitative data sources. Two different groups of participants contributed to these data sources: the UEval learners for the written reflections and the facilitators for the focus group, respectively. Also, to describe the phenomenon further and to provide evidence for the effectiveness of UEval, I employed a quantitative data source, which I will discuss later in this section.

Learners' Written Reflections. The purpose of the written reflections was to understand and describe how the learners viewed their experiences within the three course pedagogies. The

narrative voices of the learners in their written reflections made this data source apt for a case study approach that aims to enable participants to tell their stories (Baxter & Jack, 2008). For the learner reflection assignment, the learners needed to reflect on their course experiences and learnings, as per the assignment rubric. In the first section, they reflected on perceived changes in two CES competencies, in any competency domain and at any point in the course. Second, they were required to reflect on and described the in-class group process and, third, to identify any three instrumental course learnings of their choice. The learners focused on specific instances and settings in which their learnings took place throughout the course. These included online postings, classroom lectures, in-person class work, readings, and the public lecture. All three sections were equally useful for exploring what the learners identified as the crucial aspects of the experiential, co-learning pedagogy that enhanced their learning. The data was saved on a secure, encrypted database and was anonymized and downloaded for secondary analysis. Although 45 UEval learners provided informed consent, the total number of analyzed reflections were 44 because one of the auditors completed the pre-post questionnaire, but did not submit a final reflection, as it was not a course completion requirement

Facilitators' Focus Group. The purpose of the focus group was to understand the experiences and perspectives of facilitators about their roles, the role of the learners, key informants and case-based learning in UEval. A focus group is another qualitative data source that can be useful for gaining insight into the facilitators' viewpoint on the study phenomenon. Focus groups can be a rich source of socially constructed knowledge (Creswell & Creswell, 2018). The richness of this collective data is because individuals construct meanings within a specific group dynamic (Gibbs, 1997), although not all participants share in the discussion comfortably or equally (Mayan, 2009). A research coordinator led the 2-hour focus group with 7

facilitators, 2-weeks post-institute. The focus group questions included facilitator perceptions of their own training and preparedness, learner preparedness, challenges in facilitation and the role of the key informants. The focus group was not audio recorded; instead, the research coordinator took extensive notes during the meeting and tried to capture the conversation as verbatim as possible. The data was saved on a secure, encrypted database.

Qualitative Data Analysis

All the written reflections and facilitator focus group data was analyzed to answer the qualitative research question of what unique pedagogical features do UEval learners and facilitators describe as influencing learner experiences and competency gains. Initially, I used qualitative content analysis to identify, code and categorize patterns within textual data (Mayan, 2009). The case study methodology of categorical aggregation, or in the case of this study sub-theme aggregation, informed the data analysis. This aggregation includes looking for multiple instances of an event in the data and collapsing these to the four study case themes (Creswell & Poth, 2018).

Written Reflection Analysis. I used manual coding to analyze the data by paying attention to recurring patterns, such as words and phrases that are found in the text (Mayan, 2009). Since the reflection was comprised of three sections, I analyzed the three sections separately. For section one, I used printed reflections and highlighted relevant phrases or sections and wrote the corresponding codes in the margins. Afterwards, for sections two and three, I used the comment function in the Microsoft Word document. I decided not to use a qualitative software since I did not have enough data volume to warrant the use. I knew somewhat what to anticipate from the data because the assessment rubric guided the learners' reflection writing. Despite this, my initial coding process was inductive, with no search for specific preconceived

ideas. While coding, I looked for recurring words, phrases or sentences relevant to the qualitative research question, although I kept an open mind for intriguing or unanticipated data. I started the analysis with open coding and looked at the data line-by-line (Charmaz, 2006). For naming my codes, I relied on mostly descriptive but some in-vivo coding (Saldaña, 2016). Descriptive coding meant I assigned a single word or phrase to describe the data, while in vivo coding meant I used the words of participants verbatim to identify and categorize the data (Saldaña, 2016). I summarised and listed my emerging codes, sub-themes, and themes in a codebook. As well, I paid attention to data that diverged from my emerging findings.

In my second cycle of coding, I used "double coding," where I coded a document void of highlighted text or comments from my first coding (Baxter & Jack, 2008). I followed an iterative process common in content analysis, where I compared and revisited the relationship among the codes, sub-themes, and themes (Mayan, 2009). I described the relationship among sub-themes to generate themes that weaved through the data (Baxter & Jack, 2008). This continued until I reached the end of data analysis or point of saturation (Mayan, 2009). The final analysis resulted in four case themes and 13 sub-themes. Lastly, I depicted the connections among case themes to arrive to my assertions about the case (Baxter & Jack, 2008).

Focus Group Analysis. I analyzed the focus group data following my analysis of the written reflections. I used a word document and wrote the corresponding codes as comments in the margins. Like the written reflections, I decided not to use a managing software because of the brevity of the focus group summary notes. I followed the same pattern of analysis and coding as in the written reflections. In my inductive data analysis, I looked for emerging patterns as well as data that diverged from these. I compared and contrasted my findings within the same data source as well as the generated codes and sub-themes from the written reflections. Although

initially I treated both data sources similarly and did not emphasize one over the other, the 44 reflections provided depth and diversity of ideas about the phenomenon more so than the facilitators' focus group. Therefore, the learner reflections came to be the study primary data source, while the focus group was complementary.

Quantitative Data Source

Learners' Competency Self Assessments. The learners completed the only quantitative data source of this study, a pre-post evaluator professional competencies self-assessment questionnaire. The purpose of the questionnaire was to measure the perceived changes of learner competencies in all 36 CES competency levels from time 1 (pre) to time 2 (post). To answer the quantitative sub-question of what gains in competencies do UEval learners report at the end of the course? the non-experimental pre-post design was used. A simple non-experimental design may include one cohort of participants with no comparison group (Mathison, 2005). The design measures the changes from an intervention through comparing pre- and post- data (Creswell & Creswell, 2018). These measurable changes usually refer to changes in scores of a variable, such as learner competency levels, and can help infer the effectiveness of an intervention (Mathison, 2005).

The learners completed the same questionnaire twice: first, prior to the start of UEval's in-class portion, and second, three days following the completion of the in-class portion of the course. The learners accessed the questionnaires through their university login information on eclass, an online Moodle system regulated by the University of Alberta. They completed the questionnaires on SurveyGizmo, a secure web-based survey software. A reminder was sent on the due date for all learners to complete the post-questionnaire. The questionnaire was comprised of 36 questions that were divided into five competency domains with a varying number of

competencies per domain: eight in reflective practice, ten in technical, seven in situational, six in management and five in interpersonal. Participants responded to the questions using a Likert type scale with four options: minimal, some, moderate and high. The data was saved and anonymized one a secure, encrypted database, and downloaded for secondary data analysis.

Quantitative Data Analysis

The quantitative research question of the study was answered using descriptive and inferential data analyses. The anonymized quantitative dataset was imported into IBM SPSS Statistics Macintosh, Version 26 for analysis. In SPSS, the participant answers were converted from Likert ratings to numerical values of one to four, where the lowest rating of "minimal" was represented with 1 and the "high" with 4. Item scores were summed to obtain an overall competency gains score in each competency domain. Descriptive statistics was used to measure the changes in the dependent variables of self-assessed competency ratings across the five competency domains, pre- and post. The frequencies, mean, standard deviation, ranges, skew, and kurtosis of learner self-assessment scores of competencies across domains were calculated (Creswell & Creswell, 2018). Histograms and p-plots of the residuals were generated. The study variables included two categorical independent variables of time 1 and time 2, in addition to a total of 10 continuous dependent variables: five dependent variables in time 1 and time 2, each. These five variables represent the five evaluation practice domains from the questionnaire: reflective practice, technical practice, situational practice, managerial practice, and interpersonal practice.

The inferential statistics included a repeated measures multivariate analysis of variance (MANOVA) and one post-hoc repeated measures univariate analysis of variance (ANOVA). A MANOVA is warranted when the study has two or more independent variables or factors (Field,

2018). Since the study employed a factorial design, the interactions and effect of the independent variables of time 1 and time 2 on the outcome variables was explored. Outliers and assumption of normality were addressed, and the MANOVA excluded participants (n=9) with missing data points and therefore, these analyses were run for (n=36). The post-hoc repeated measured ANOVA was used to identify which independent variables had a statistically significant relationship with each of the outcome variables

Strategies for Enhancing Rigour and Validity

Cronbach's alpha was calculated to assess the reliability of the five subscales on the CES questionnaire. The alphas ranged from good to excellent ($\alpha = 0.85 – 0.87$) indicating that the five CES subscales on the questionnaire were internally consistent.

I made qualitative rigour a priority in this study through several activities during my data analysis. My specific measures of rigour included credibility and dependability. Credibility means that the researcher can substantiate that their analysis claims are derived from linking the data to analysis (Charmaz, 2006; Mayan, 2009). First, I employed thick description as a strategy to establish credibility in my writing; that is, provided enough evidence for the reader to form an independent assessment about the findings (Charmaz, 2006; Tracy, 2010). Second, I chose data triangulation, or multiple data sources, to help provide an in-depth description of UEval as a case (Tracy, 2010). Third, I shared my emerging findings with my supervisor on several occasions.

Dependability refers to the ability to review the rationales behind analytical decisions through keeping relevant documentation. Accordingly, I kept a hard copy and a digital audit trail in notebooks, Microsoft Word, and audio recordings about all my research decisions (Mayan, 2009). Also, I wrote reflective and reflexive memos to help me create connections between existing ideas and emerging data (Charmaz, 2015). Memoing my thoughts about

emerging data was instrumental in the many data re-sorting efforts among codes, sub-themes, and themes; this helped me differentiate the different levels of data. As well, several of my memos served as the basis for my writing about the findings. Ideally, member checking of my emerging themes would have been a good verification strategy to confirm if the case themes resonated with the participants (Creswell & Creswell, 2018; Tracy, 2010). However, since I completed secondary data analysis, this was not possible.

Chapter 4: Findings

This chapter presents a summary of the findings based on the multiple methods that the study employed to provide a case description. In the first section, the chapter will briefly focus on the quantitative findings, which examined the quantitative research question: what gains in competencies do UEval learners report at the end of the course? In the second section, the chapter will unfold the case description through the discussion of the four study case themes and their sub-themes, which will answer the qualitative research question of what unique pedagogical features do UEval learners and facilitators describe as influencing learner experiences and competency gains?

Quantitative Findings

The quantitative data analysis aimed to demonstrate if different time points had a significant effect on the competency gains of the learners.

Descriptive Statistics

In this section, I summarize the results from the descriptive analysis. The means, standard deviations, frequencies, ranges, skews, and kurtosis were calculated from participants' self-assessments, across the five competency domains. Across all five competency domains, all five reported self-assessment means increased from pre- to post-course. The descriptive analyses for the overall sample are presented in Tables 3 and 4. Outliers were interpreted visually with boxplots and the pre-course technical practice was the only dependent variable with an outlier.

Table 3

Descriptive Statistics for the Overall Sample Pre-course

Variable – Pre-Course (T1)	n	M	SD	Range	Skew	Kurtosis
Self-assessment rating						
Reflective Practice	36	2.25	0.55	1.38-3.75	1.09	1.30
Technical Practice	36	2.03	0.67	1.00-3.80	0.82	0.55
Situational Practice	36	2.42	0.66	1.29-4.00	0.33	-0.58
Managerial Practice	36	2.23	0.73	1.00-3.67	0.23	-0.84
Interpersonal Practice	36	2.70	0.68	1.80-4.00	0.48	-1.00

Table 4

Descriptive Statistics for the Overall Sample Post-course

Variable– Post-Course (T2)	n	M	SD	Range	Skew	Kurtosis
Self-assessment rating						
Reflective Practice	36	3.21	0.47	2.25-4.00	-0.11	-0.64
Technical Practice	36	3.18	0.53	2.00-4.00	-0.42	-0.18
Situational Practice	36	3.25	1.71	1.71-4.00	-0.59	-0.52
Managerial Practice	36	3.16	0.65	1.83-4.00	-0.11	-0.30
Interpersonal Practice	36	3.44	0.48	2.20-4.00	-0.66	-0.37

The minimum and maximums are the lowest and highest possible measured score for each variable and range between 1.00 and 4.00, with continuous scores in-between. As shown in tables 3 and 4, when comparing the reported minimum scores of the five competency domains, there is an increase from pre- to post-course. The pre-course minimum scores in five competency domains ranged from 1.00 to 1.80. In contrast, the post-course minimum scores for the reflective, technical, and interpersonal domains of ranged between 2.00 and 4.00, indicating that no learners perceived themselves as having minimal competencies, while the situational and managerial post-course were less than 2.00 but still higher than the pre-course minimums.

The frequency analysis of learner self-assessment indicates an increase from pre- to post-course, as indicated in tables 5 and 6. In pre-course, most of the self-perceived gains fell between 1 and 3. However, in the post-course, very few participants reported perceiving themselves as having minimal gains from 1-1.99 and most of the self-perceived gains fell between 2 and 4.

Table 5

Frequency Results for the Overall Sample Pre-course

	Reflective	Technical	Situational	Managerial	Interpersonal
1-1.99	33.3%	52.1%	33.4%	43.7%	12.6 %
2-2.99	54.2%	39.2%	50.0%	41.6 %	68.7 %
3-4.00	12.5%	8.7%	16.6%	14.7 %	18.7 %

Table 6

Frequency Results for the Overall Sample Post-course

	Reflective	Technical	Situational	Managerial	Interpersonal
1-1.99			2.1%	2.0%	
2-2.99	43.8%	46.8%	35.4%	51.0%	38.8%
3-3.99	56.2%	51.2%	62.5%	47.0%	61.2%

The positive skew values for all the pre-course scales suggest that the distributions are skewed to the right, as can be seen in Table 3. These positive skews indicate that more participants reported having competency levels below the mean for each competency domain. In contrast, the negative skew values for all the post-course scales in Table 4 suggest that these distributions are slightly left skewed. These negative skews indicate that more participants reported having above average competency gains.

The pre- and post-course kurtosis values in tables 3 and 4 were compared to 3.00. Two positive kurtosis values for the pre-course reflective and technical domains suggests the presence of heavier tail distributions indicating that responses tended to be more clustered around the mean. As shown in tables 3 and 4, the remaining eight negative kurtosis scores in pre- and post-course variables. These imply distributions with lighter tails meaning more participant responses tended to be less clustered around the mean.

MANOVA and ANOVA

To determine if there was a significant effect of time 1 and 2 on competency domains, a repeated measures MANOVA was conducted. All the multivariate test statistics were significant

($p < 0.05$), as shown in Table 7. Therefore, it can be deduced that there is a significant change in the scores of competency domains across time. Following this, a post-hoc univariate ANOVA analysis was completed.

Table 7

MANOVA Multivariate Test Results

Time Effect	Wilk's Lambda	F	Hypothesis df	Error df	Sig
	0.202	24.52	5.00	31.00	0.00

In the post-hoc univariate repeated measures ANOVA the corresponding corrective coefficients were Greenhouse-Geisser $\varepsilon = 16.651$, $p < .05$ for reflective practice, technical 25.03, $p < .05$, situational, 12.26, $p < .05$, managerial 15.58, $p < .05$, and interpersonal 9.82, $p < .05$. Therefore, it can be deduced that there are significant changes in individual dependent variables or perceived competency gain scores across the two different times.

Qualitative Findings

The findings of this study were based on the analysis of 44 written learner reflections and a focus group with seven facilitators. The study used these two data sources to generate four interdependent case themes: (a) learning with and from one another; (b) learner perceived competency gains; (c) learners modeling community-engaged evaluation practice; and (d) learners building their evaluation capacity. These themes and their sub-themes summarized the participants' perspective or meaning of UEval learner experience related to competency gains. Figure 2 shows how the themes, with their corresponding sub-themes, sequentially influence each other and will be described in detail below. I have included illustrative quotes from the learners' written reflections and the facilitators' focus group as evidence of my findings in all the

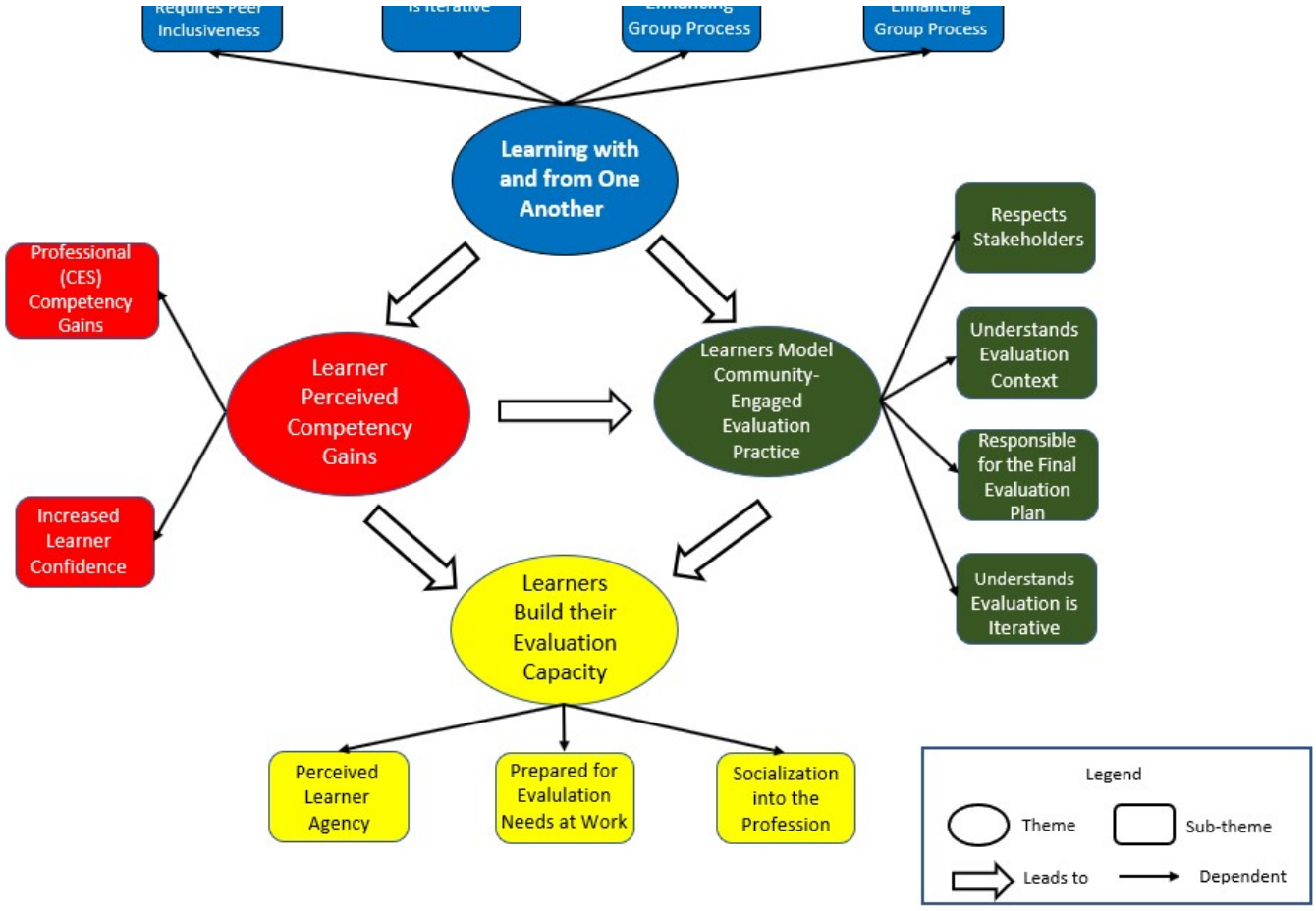
case themes, except the last theme learners building their evaluation capacity. The participants of this theme are solely the learners because capacity building as a topic did not emerge from the facilitators' focus group**.**

Case Theme 1: Learning with and from One Another

Many learners described this theme as collective learning with *and* from one another, during their case study work. That is, they depicted the group process as "contributing"

Figure 2

Relationship Among the Main Themes and Sub-themes



cohesively and "efficiently group work based on equal peer participation and responsibility" that resulted in enhanced peer-to-peer learning. This theme consisted of four sub-themes, mainly,

how the learners depicted that enhanced co-learning centred on an effective group process requires (a) peer inclusiveness and (b) iteration with (c) facilitators guiding and (d) diverse co-learners enriching the group process. Interestingly, one topic of quiet learners' participation emerged under the sub-theme of peer inclusiveness.

The findings suggest that trust building was a common foundation weaved into the case theme and influenced its sub-themes positively. Trust building meant that learners demonstrated good faith towards the intentions and contributions of their peers. In other words, it seems everyone was invested in and contributed equally to the final product. This rendered the group process collaborative.

Group Process Requires Peer Inclusiveness. Many learners depicted their co-learning experience as "inclusive" and centred on the creation of a safe, egalitarian collaborative space by exercising flexibility and respect. Learners depicted the inclusiveness of the ideas, "skills and knowledge of each team member." These learners recognized the creation of a safe space during brainstorming as an "intentional effort" to "make space for each other and draw one's peers into the discussion," while encouraging the "very open flow of ideas." The facilitators reiterated the need for learner flexibility because they perceived some learners as having "rigid" expectations about what is to be learnt, and how it needs to unfold. Learners defined peer flexibility as being "open about the process" and "letting go of some of the [personal] control" and judgement of others to proceed in a less pre-defined way. That is, the learners were flexible in "appreciating that everyone had something to contribute" and understanding the necessity of different working and learning styles towards accomplishing tasks. Additionally, the facilitators described flexibility as the learners' acceptance of their peers "taking ownership of the project." The learners echoed this notion of ownership or responsibility of tasks through their peers' "self-

appointed roles" in group work, or "pulling their weight" in brainstorming, task division and completion. This required that the learners be intentionally "civil" or "friendly and respectful" to "accommodate others' views and tendencies," however different. In return, this enhanced group brainstorming because the learners could contribute or ask questions without fear of "judgement or conflict." For instance, they made each other feel safe and "supported each other when they "voiced misunderstandings" about group or course work. Interestingly, the learners mentioned that through expressing their concerns, they realized "that we all had the same questions."

Group Process is Iterative. Many learners described group process, brainstorming and group work as highly iterative, with a "lot of back-and-forth" between the many components of the final evaluation plan. Some of these included the evaluation questions, type and purpose. One learner concluded the struggle of iterative and "in depth conversations were somewhat frustrating at the time but now I can see the incredible value they added to my learning." The learners described iteration as crucial for cohesive and effective group work to "accommodate revisions" and "refine" ideas. According to the learners, iteration helped "achieve the advantage that the group brought" because they came to realize that "flexibility and a willingness to change course was not only helpful, but necessary." In addition, through the trial-and-error iteration the learners came to "understand the non-linearity of the evaluation process." For instance, the learners concluded that the more they intended to understand the evaluand, the more they needed to rely on the stakeholders and refine the evaluation process. Therefore, the learners had "continued discussions" with the key informant to decide on the aspects of evaluation.

Lastly, inclusiveness and iteration posed the need for group consensus building or orchestrating diverse and sometimes conflicting ideas about the contents of the final evaluation plan. Therefore, the learners described arriving to consensus as one of the core stages of group

process or co-learning. They described their group's paradoxical "challenge" of consensus building of "everyone wanting to create a strong evaluation plan for our organization, but all had slightly different ideas on how that should happen." Many of the learners described the following five group interactions as part of the consensus building process: (a) "listening" actively and empathetically to teammates with no judgement or reservations, (b) providing "constructive feedback" to teammates about their shared ideas, (c) "negotiating" which of the shared ideas should be included in the evaluation plan, (d) "recognizing" each other's' unique strengths and (e) "synergizing" and "maximizing" group ideas and efforts through collaboratively dividing tasks in alignment with learner strengths. Most learners described these five stages as fluid and iterative. For instance, it is possible that some groups might have skipped certain steps or spent more time on one step because of their specific group dynamics. Lastly, despite the advantages of consensus building, some learners found it as a time-consuming and "tiring process" because they "had eight people trying to provide their opinions and insight.

Quiet Learners' Participation. Notably, a minority of learners recognized themselves or their peers as "quiet" learners in group work. They pointed out two reasons that influenced their quiet demeanor. The first included internal or personal factors like learning style, while the second included external factors like group dynamics. Some learners cited personality as the reason for their quietness and reflected on their struggles to "push themselves outside of my comfort zone to speak up." Similarly, another learner described the experience of working with others as "exhausting work for an introvert. I did find myself coveting a quiet space to think and reflect on what I had learned." As well, other learners were quiet because of their further need to reflect on their learnings. For instance, a learner who mentioned having years of experience working in groups remarked on their younger peer's transformation in participation from quiet

and “less experienced” to “making solid contributions” by the end of the week. Contrary to what the learner initially thought, the young peer “was insightful and it was obvious that he had been listening and absorbing the discussions.” Another learner attributed their quietness to feeling “overwhelmed” because of their slower pace compared to their group members, who possessed more evaluation expertise. However, once the learner “fully understood” the purpose of the evaluation plan and organizational context, they gradually “contributed a lot more to the project.”

Remarkably, unlike the learners who cited internal or personal factors, the learners with external reasons for their quietness expressed their disengagement in their learning. The second group of learners portrayed their groups as not achieving effective group process. A learner commented that “the same group dynamics that enhanced my learning became a challenge at times.” Predominantly, this was due to one or two learners creating conflict through directing the group discussions, task divisions, and even mood. As a result, their group dynamics was not conducive to learning because of “clash of personalities” and opinions resulting in “passionate” and “heated” discussions. The learners described ineffective group process as the group having a divisive focus on “managing relationships … rather than completion of the activity.” One learner contrasted their engagement and disengagement in different groups during morning group activities.

> The small groups that I found I learned most in were the groups that had more fun; groups where everyone contributed fairly equally, where there was laughter and curiosity. The groups I took less from were those where one or two people dominated the discussion, discouraging ideas from others. I found that I tended to disengage from those people and so my learning missed the depth it would have had otherwise.

Lastly, there was only one surprising mention of "getting along a little too well" described as a "challenge." That is, too much of a safe space meant that "it was difficult to break the unity with criticism or alternate viewpoints when things are so congenial." Minimal or absent learner participation meant that active listening and respectful feedback, crucial for consensus building, were compromised. In these situations, many learners referred to the critical role of the facilitator in helping the group refocus on their tasks, as I discuss below.

Facilitators Enhancing Group Process. Most learners described the facilitators' critical role in fostering collaborative co-learning. In particular, the facilitators helped the case study groups overcome interpersonal challenges and tangent discussions, while guiding them towards the completion of the plan. The facilitators defined their own role as striking "balance between sitting back versus being too involved." Some learners confirmed this depiction of the facilitator as "providing gentle guidance when we needed but was never obtrusive or overbearing." The facilitator's balancing act echoed what the learners mentioned about their "use of these two approaches." The learners perceived the facilitators as intentional in fostering their independence and helping them "navigate the activities on our own." Some learners described the need for a facilitator because too many suggestions during brainstorming meant that some of their "ideas would at times take us out of the scope of the evaluation work." One learner used the metaphor of "stuck in the weeds" to describe this possibly overwhelming situation and indecision in consensus building. However, when the facilitator recognized this, they supported and helped us stay on track and guided the discussion to focus on a more collaborative approach. One facilitator achieved this through reminding the group that frustrations were "a normal part of the process." Another facilitator asked questions to get at the learners thought processes. Another learner, who also shared feeling stuck indicated that they felt empowered because of their

facilitator's "encouragement to keep digging." The learners perceived this guiding and participatory role of the facilitators as modelling "how fluid community engagement facilitation" with stakeholders needs to be.

Some learners pointed out the semi-structured approach of their facilitator influencing positive team development enhancing learner responsibility and learning. One case study group learner mentioned their facilitator assigning roles for the learners, such as "establishing goals, roles, draft agenda and responsibilities for the week" to "contribute to the team readiness and collaborative co-learning. As a result, most learners self-identified their increased "contribution to the project and discussions" and "engagement." A learner from another case study group concurred that taking on a variety of roles provided a learning opportunity to "explore my own strengths, challenges and learning goals." On the other hand, the facilitators concluded that their role was also somewhat "instructional;" that is, sometimes, it included strategically "telling the answer" for the group to proceed.

Diverse Learners Enhancing Co-Learning. Many learners described the intersectoral and interdisciplinary diversity of UEval learners as influencing group work and enriching learner experiences. The lack of academic pre-requisites to enrol in UEval brought together various types of learners: undergraduates, graduates and open studies learners. Mainly, the learners identified diversity of their peers through their (a) diversity of opinions and professional experiences, (b) diversity of personalities and learning types, and (c) diversity of evaluation expertise. Learners perceived UEval as a unique and enjoyable learning experience because of its inclusion of diverse voices. The case-based learning was perceived as providing opportunities for learners to model each other's behaviour over the week. A learner in a case study team with preassigned and rotating learner roles reflected on modeling the behaviour of peers:

> I remember how calmly and centered [my peer] was performing as a leader and I caught myself thinking – 'this is what a great leader is: guiding team members through activities making sure that they feel supported, encouraged, and appreciated for their contributions'. The next day when it was my turn to be the leader, I tried to maintain that same posture I observed a day before.

As well, a learner described their intersectoral co-learners in what as "community stakeholders who are involved in" diverse fields of human services, such as "community engagement, sustainability, and evaluation." Therefore, working on the evaluation plan in this setting "mirrors the work that is done with stakeholders in community."

Many learners noted that co-learning with diverse peers enhanced their learning experience through reciprocal or peer-to-peer learning**.** They defined peer-to-peer learning as "listening to what the peers had to say" and co-creating though "rich discussions." Specifically, some learners characterized the diverse perspectives of their peers as the "wealth of knowledge that they brought into the group activities." As a result, the learners mentioned about their "shifted thinking" through "gaining new or altered perspectives" about the role and scope of evaluation. Mainly, because "each learner contributed through their individual lens of lived experiences, ethnicity, gender, age, political, social, economic, etc." The learners characterized this diversity as "beneficial" because it "created an atmosphere where we had a lot to offer each other in sharing learnings." For instance, they identified working in several random groups during the morning activities as providing "a different dynamic in which to learn." That is, by participating in multiple groups, the learners had the opportunity to be exposed to as many diverse learners and "draw on many perspectives." As well, this included the varying evaluation experiences of "many different voices in the room; some members had practical experience in

evaluation, some had mostly academic understanding, and some had both. This incredible mix of group members contributed to a successful learning experience."

Another learner described their peer-to-peer learning experience as ongoing (or in progress) saying: "[I was] consistently working with individuals who tackled the problems from a different angle than myself, which truly expanded my strategies as a research student." Similarly, some facilitators concurred that the learner diversity contributed to what they described as a "generally richer learning experience." Unsurprisingly, the learners identified peer-to-peer learning as a factor that contributed to the enrichment of the case study activities, where rich and diverse participant perspectives "strengthened, the evaluation process" and led to an enriched final evaluation plan. A key informant reflected on the diversity of perspectives that informed their final evaluation plan and encouraged evaluation usability: "it is so worth the extra effort to include everyone's thoughts and ideas, as in the end our organization will receive something that … staff members can really see working for our programs and organization."

The learners identified the diversity of their peers as crucial in helping them navigate the inherent complexity and unpredictability of group activities and cases. One learner stated that "the individual experiences and professional background of class members provided contextual expertise that was essential to understanding the complexity of the activities." Learners defined complexity of the community-based cases as that which "requires collective thinking about the human experience from many lenses." For instance, this collective thinking included their peers' shared "creative ideas" and "insight" based on their "past experiences." Another learner reflected on the significance of having intersectoral and interdisciplinary learners in addressing complexity in evaluative co-learning.

> These connections from across sectors is critical for innovative ideas and enhancing one's own 'systems thinking' skills… Through engaging with colleagues from a variety of sectors, it opens up new ways of analyzing complex problems and the possibility for solutions to these complex problems.

The facilitators concurred that the learners needed to appreciate flexibility because of the "community-based aspect" of the course. Therefore, the case study activity with diverse learners modeled to the learners "those complex and dynamic living systems in which evaluation and implementation processes are often taking place." Many learners referred to diversity as helping the group be "adaptive to the unpredictability" of the group process and "expect messiness to exist as the evaluation proceeds." Another learner depicted "evaluation … within complex systems" as "unchartered waters" that "require active and iterative application to understand what works, why it works, when it works and for whom." As many learners indicated, this unpredictability implied the need for "flexibility" to navigate the "messiness" of community contexts, such as not knowing how stakeholders will respond to the evaluation. As one learner commented about their role in their workplace: "changing expectations are precisely the items that can make projects go off the rails. I now have a much-heightened sensitivity … and will redouble my effort to make sure that expectations are uncovered … and addressed properly." Thus, diversity contributed to enriched co-learning, which answers the sub-research question of specifically what aspects of the experiential, co-learning pedagogy influenced learner experience related to competency gains.

Case Theme 2: Learner Perceived Competency Gains

Many learners talked about learning from and with each other as leading to their perceived competency gains. This theme is defined as a noticed improvement in their overall

comprehension of evaluation and application of learnings. When revisiting some of the course content, many learners reflected that they had learned a lot from UEval with one learner commenting "[they were] pleased to see how much they now understand compared to the first time they went through these slides." Similarly, despite having lingering questions about evaluation, learners talked about their changed perception; for example, one learner described this change "in the way I think and what I know about evaluation." This theme was comprised of two connected sub-themes of (a) professional CES competency gains that led to (b) increased learner confidence, which I will describe below.

Professional (CES) Competency Gains. Many participants identified the technical competency domain as their main category of gains. A learner echoed that "the amount of information taught helped me understand the evaluation process, models, tools and process of conducting/planning an evaluation plan." Many participants referred to competency 2.1, "clarifies the purpose and scope of the evaluation," as the source for a "deeper understanding and appreciation of the process of evaluation." Through this competency gain, the learners understood the scope and purpose of evaluation, and aligned them with their evaluation questions and methods. One learner indicated that the logic model exercise "opened a door for me" to align all the evaluation components. Learners specified this alignment as "critical" in their "understanding these technical requirements of evaluation."

Another competency gain that many learners mentioned under the technical competency domain was understanding the different data collection sources and methods. As one learner referenced that their gains enabled them "to think about data collection more holistically and to make decisions on what sources … would best support the evaluation questions." Several learners identified the guest lecture about methods as the main source for distinguishing between

multiple and mixed methods. Reflecting on the same lecture, other learners mentioned revising their views about qualitative and quantitative data sets as distinct because they were "challenged to think about how qualitative data could be used in a quantitative matter to further support evaluation objectives." Lastly, based on the same lecture, another learner mentioned that they were "excited to test new methods" of data collection instruments because "surveys have felt like the only option to me for a long time." Additionally, many learners frequently mentioned their technical competency gain of putting together a coherent evaluation plan: "In the past I've had experience with specific elements of evaluation independent of each other, but this course has taught me how to integrate these pieces into one process and better understand how they're all inter-related and connected."

As well, the learners referred to perceived gains in the situational competency domains. Repeatedly, they referred to the competency gain of understanding the role of contexts and stakeholders within this domain. For instance, through working with the key informant, learners pointed out their "exposure to these organizational barriers" that "provided an opportunity to explore all of the different scenarios, therefore, contributing to a plan that was set up for success." In addition, another group of learners mentioned their learning about contexts and stakeholders through the different stakeholder mapping activities. One learner contrasted their new understanding of stakeholders in community context to their former experience of working with stakeholders in a business context. That is, the same experience of stakeholder mapping helped them arrive to a different conclusion about stakeholders: "this was my first time thinking about stakeholders from these various angles of influence and power, lived experience, etc."

Many of the learners expressed their gains in the reflective competency domain when contemplating the factors that influenced their recently altered perception of evaluation practice.

> I have embraced many myths about evaluation throughout my career, such as nobody has time for it, it's only for funders, we know what we do is working, high participation equals impact, and the list goes on. Only more recently, have I begun to think deeper about evaluation and to question what has always been done.

Similarly, another learner from the university expressed their gains in the reflective competency domain when they reflected on their understanding of the role of evaluation versus research:

> Prior to this course, I felt that evaluation was a subset of research. However, I realized that this view was a product of my academic training. I am much more convinced that, in the community context, evaluation needs to be at the forefront and that the evaluation design and process has equal weighting as the research design and process.

The learners pointed out that the different group exercises in the five stages of consensus building called for the employment of different types of competencies**.** For instance, the learners frequently cited active listening and clear and tactful feedback with their peers as their gains in the interpersonal domain: "developing listening skills, while also working on being direct when it came to making suggestions or communicating my ideas on the subject matter." As a result, the learners mentioned that "the group work in-class and the case study group allowed me to communicate and interact with various individuals and enabled me to understand their reasoning and point of view." Also, the learners identified competency gains based on group activities as situational and managerial. For instance, consensus building relied not only on understanding the stakeholders' viewpoint, but also assessing their strengths. Many learners mentioned their informal leadership role of maximizing group efforts through employing their peers' strengths in alignment with the needs and objectives of the group work.

Many learners referred to specific competency gains informing others in different competency domains. For instance, in the context of the case-based group work**,** the logic model activities targeted technical competency gains, or "provided an opportunity to critically examine … the evaluability of the organization." Equally, the logic model activities also served a tool that "helped" the learners "understand" situational and interpersonal gains of how the evaluation "would result in mutually negotiating agreements, sharing understandings, and consensus building." Some learners expressed their preference of alternative ways of learning, such as through the non-linear, tree-shaped logic model. They identified the tree as a "very useful tool" and "creative approach" to help them "visualize the relationship between inputs, outputs, outcomes as well as external influencing factors." Other learners mentioned that the tree visual enhanced their learning because "all the pieces come together in a more logical way – like a puzzle." Another example that many learners provided about the relationship between activities and competency gains was understanding knowledge mobilization better because of stakeholder mapping: "the circular stakeholder mapping tool was a valuable asset when combined with the knowledge mobilization chart. These tools allowed me to strategically consider how and when to communicate key messages to different stakeholders." To conclude, the learners identified real time group work with peers and key informants made it possible for technical competency gains to occur alongside other competency domains like situational, interpersonal, managerial, and reflective.

Increased Learner Confidence. Most learners described their perceived learner competency gains as increasing their confidence to conduct, share and use evaluation. A learner described this explicit relationship between competency gains and confidence as such: "because I have gained context for the different methods, I am more confident in my decisions." Also, many

learners explained or equated being confident to feeling capable. For instance, a learner mentioned that "all of the communication tools and discussions we had in class left me feeling confident in my abilities." Another learner reflected about how through their newfound capabilities they were "able to make direct and ongoing connections to many areas of the work that I do and that my mind was jumping to many practical applications." Therefore, by the time the learners came to feel confident, they perceived themselves as capable and equipped to face evaluation in the workplace. Notably, many learners who described having increased confidence happened to already conduct evaluation in their workplace. In contrast, only one learner referred to their learnings influencing their thesis on evaluation. This discrepancy maybe because workplaces provide opportunities for direct application of learner gains from an experiential course.

The concept of increased learner confidence makes more sense when understanding the learners' perception of evaluation, pre-UEval. Many participants indicated that prior to participating in UEval, they perceived evaluation as a "nebulous" and even "all consuming" and "intimidating" activity, with no clear scope. Some learners attributed this intimidation to their lack of evaluation literacy or "the theoretical and foundational knowledge needed to ground their work in evaluation." By the same token, other learners suggested that they did not know where to start with their evaluation efforts, which they described as "instinctual" and "amorphous," at best." As one learner shared, although they might have known something about evaluation prior to UEval, it was all unclear or incoherent.:

> As a result of this course, I have a better idea of how all the pieces fit together. Before taking this course, I had lots of the "pieces" of evaluation, but I did not have a cohesive

picture of how the pieces fit together. This course took the muddled idea I had about evaluation and clarified it. For me, this clearer understanding is the biggest key learning.

UEval learners' understanding of the scope of evaluation helped them perceive evaluation clearly and no longer as "amorphous," indistinct or mystified. Several learners referred to their knowledge of how to put together a final evaluation plan as their "strong foundation" for this new scope. In addition, many learners wrote that based on this clarity they envisioned themselves as proactive and efficient. Some learners went from associating confusion with logic models to describing them as "a useful tool because they now understand," but also "feel more confident about creating their own." Other learners planned early and purposeful plans for data collection and knowledge mobilization, as opposed to "not having a plan for using the information gathered." A learner confirmed this when writing that "one of my most influential learnings is that evaluation doesn't have to be intimidating. When you are clear on your intention and can identify scope, you can plan an effective evaluation plan that isn't all consuming."

Case Theme 3: Learners Model Community-Engaged Practice

Many learners reflected that the collaborative work in group process influenced their perception of themselves as community-engaged evaluators. Learners defined community-engaged practice as their stakeholder-centred worldview and approach of working with stakeholders *and* for their benefit. Mainly, they viewed their future professional selves as evaluators with a specific community-engaged focus because of participation in co-learning. In other words, they felt prepared to navigate evaluation within community contexts. Therefore, the study findings suggested the learners internalized their role of a community-engaged evaluator as a perceived professional identity based on their perceived competency gains and the community-engaged worldview. I will elaborate on this identity through the description of four sub-themes,

or how this evaluator (a) respects stakeholders, (b) understands evaluation context, (c) is responsible for the final evaluation plan, and (d) understands evaluation is iterative.

Like the group process theme, trust was the common foundation weaved into community-engaged evaluator identity and its sub-themes. For instance, the learners commented about the significance of trust building through iterative discussions in the community context. Also, the findings suggested that the learners reflected on extrapolating this trust from the case study work with stakeholders into their current organizational context.

Respects Stakeholders. The learners described the community-engaged evaluator as respectful in their relationship with stakeholders by "ensuring voices are properly represented" because "without such stakeholder engagement, the evaluation will be hindered, and the results of the evaluation may not be acted upon." Another learner described their learnings about the inclusion of stakeholders as the "stance that stakeholders are active participants in the evaluation process, and that information doesn't just go one way; … the reciprocal process and the potential for sharing information in all directions was an appreciated learning from the course." Another learner echoed this when they mentioned that "an in-depth and balanced evaluation includes all perspectives and this can only be achieved through collaboration, open input and respectful consideration of all perspectives, as well as addressing change when it happens." Learners also expressed respect when they considered their professional role as "being good stewards of our relationships" with stakeholders, whom they perceived as "vital to [their] organization's sustainability."

Also, learners referred to other aspects of respecting stakeholders through including them in decision making about methods and knowledge mobilization: "how would people feel most honored and respected during collection of data, and afterwards in the dissemination phase?"

Therefore, the learners concluded that despite its accompanying challenges, "respect for the perspectives and viewpoints of others cannot be tokenistic" because tokenism can negatively influence "the content and balance of the resultant evaluation plan," including its "authenticity, reflectiveness and accuracy." Lastly, the learners also referred to the inclusion of stakeholders' knowledge and viewpoint as a form of respect. For instance, one case study group accommodated their stakeholders' worldview in their group work by knowingly adopting the community-based philosophy of the stakeholder: "the group process reflected in this case study was community-driven, with the philosophical spirit of Ubuntu which is often translated as 'I am because we are,' or 'humanity towards others.'" The key informant of this group confirmed that "the values of our organization– the story listening and ubuntu – trickled into the group" because they were "completely respectful and so kind to one another."

Understands Evaluation Context. Learners referred to the significance of understanding the stakeholders' community context and unique needs for their evaluation framework. They depicted the centrality of context in evaluation practice, knowing that "every evaluation effort is highly contextual, with different nuances that call for certain sets of skills, knowledge and even improvisations." During the case study activities, the learners "examined and responded to the natural context within which the program is embedded [and] helped to make sure that their work as an evaluator is extensive and inclusive." Therefore, they were intentional in "probing" and asking the key informant relevant questions about the programs, while "not making assumptions made it very informative and guided the conversations and learning in general." Another learner echoed this probing as a learning moment because the key informant "had not truly pinpointed what they were hoping to accomplish" and this "helped them focus on asking the right questions." Learners referred to how crucial it was to have "insider information" from the key

informant to guide their thinking about "ways to collect the data and share the results." Two key informants concurred this when citing their group's inquiries about the program activities and beneficiaries: "the group was keen on really getting to know us so the work for the week would be meaningful and relevant to our needs." Lastly, some learners thought critically about their workplace evaluation context. For instance, one community learner commented about what they came to perceive as the different evaluation priorities of their workplace stakeholders: "I've had varying success with this in the past. Sometimes our [group of stakeholders] were on board, but when they have their own evaluation plans, they rarely agree to do anything that would interfere with their processes and data collection activities."

Responsible for the Final Evaluation Plan. The learner's responsibility as a co-creator included their accountability towards their peers and the final evaluation plan. The learners suggested that their self-perception of responsibility emanated from their concern about the welfare of stakeholders, or how this may impact the lives of program beneficiaries: "the teaching in this course only reinforces the idea that we need to take the time" with stakeholders "to think about how we can better work together for everyone's benefits." Similarly, a learner who had the opportunity to visit the program site reflected on their experience, while echoing a similar thought:

> I gained more information on how data would be collected for evaluation and the need to consider who would be collecting the data. It also changed my perspective when writing the final evaluation plan. Now I will be considering more how seniors would use this evaluation not just the program funders.

In addition, the learners identified their familiarity with the informant or the organization as contributing to their stakeholder-centred attitude of responsibility. A learner from the community

reflected on the transformation of their peers from grade- to stakeholder-centred. Need to set up quote

> I noticed that over time people began to contribute and help construct the evaluation plan in a genuine way in order to create something useful for the informant. As we got to know one another and hear about the program that we were hoping to support, our efforts became more relevant. This was not a hypothetical problem to be solved. The informant was real, and we could see how meaningful our efforts were. This was a departure from some of our earlier group conversations where it became apparent that for some, the case study was an assignment and grades were the currency.

A key informant described themselves as experiencing an "emotional" moment below when they had realized how deeply invested their peers had become in the final evaluation plan:

> At first, I was worried that the team would rely too much on my input, but once they understood my agency better, they really started taking responsibility for creating framework [plan] content. … I felt so blessed to have this hard-working group of students doing their very best to create a legacy gift for our organization.

The above learner examples align with the competency 1.4 of the evaluator "considering the well-being of human and natural systems in evaluation practice" in the reflective practice domain. That is, the stakeholder-centred attitude is inseparable from an ethical stance towards. Lastly, the participants repeatedly mentioned their sense of responsibility included tailoring the evaluation plan to the context and needs of the stakeholders. That is, a plan "that would best meet the unique needs of project participants." Another key informant related this community-engaged understanding to evaluation use; that is, they perceived their group's choice of tailored data collection methods as "something that we can build on and use in our agency."

Understands Evaluation is Iterative. Many of the learners described the community-engaged evaluator as cognizant and appreciative of the need for iterative discussions with stakeholders. For instance, some learners identified their learnings of how to listen actively and provide constructive feedback with tact as significant for their future interactions in the community context. Few learners perceived being iterative as necessary for contributing to the creation of a collaborative organizational evaluation culture. A learner deduced from group work that "good evaluation questions …involve active negotiations between the evaluator and project stakeholders and is important to understand because community spaces are dynamic." Facilitators affirmed this when discussing the learners' need to understand "flexibility and collaboration" that community-engaged evaluation requires. Therefore, iteration includes refining ideas in the evaluation process, as well as ensures that "each voice is heard," especially in traditionally marginalized communities. A learner stated that "each person in the mapping process has a different perspective and getting the right people in the process is important ... This aligns with what I have heard in Indigenous communities."

Case Theme 4: Learners Build their Evaluation Capacity

The learners revealed that both their perceived learner competency gains and community-engaged evaluator practice contributed to building their evaluation capacity at the individual and organizational level**.** This case theme and its three sub-themes encompass aspects of evaluation capacity building, or evaluation mindset and action towards evaluative change. For example. (a) the learners' perceived agency helped them to (b) feel prepared for evaluation work. That is, they identified evaluative gaps in their workplace and applied their learnings to enhance their organizational capacity. Lastly, the learners described evaluative mindset and change through their (c) socialization into the profession.

Perceived Learner Agency. Many learners described perceived learner agency as their ability to act on their newfound confidence *and* capabilities to influence evaluative change in their given context. A learner shared that "I have realized that I can apply an 'evaluation mindset' to a lot of the work that I do." One learner employed the metaphor of a garden to reflect their awareness of their perceived agency:

> Reflecting on my learning, I have seen my garden grow and blossom. … Both the challenges and the strengths contribute to the whole gardening process and has given me more courage to see my own capacity to work in the garden and ultimately showcase a beautiful healthier garden to enjoy and perhaps even gather a bouquet or harvest a basket of produce to share with others. In summary, my experience through this course strengthened my awareness, understanding and confidence in the evaluation management, skills, and process. My hope is to continue to support and build capacity in community as they discover the richness that reflection and evaluation contribute to their work.

Many learners also detailed "feeling much more capable" to build individual and organizational evaluation capacity through "applying both the tools and knowledge that I learned during the course, as well as the tools that I was familiar with prior, to my work evaluating the programs at my organization." Therefore, the learners depicted their experience as "eye-opening" and their gains applicable and "knowledge in which I feel will benefit me in my advocacy endeavours and cooperative efforts in community engagements." Other learners perceived application of their learnings as introducing change in their existing evaluation approaches and procedures. For instance, a learner stated that they "will not need to lean so

heavily on the strategies they have used most frequently in the past." This thought aligns with another learner's description of their competency gains and altered thinking:

> It has already been quite useful to me to understand the various approaches to evaluation because I have been able to think about our programs and services differently. I have noticed since being back to my regular work, I have been constantly asking myself, why are we doing what we're doing? What do we want to achieve? What do we assume will be achieved and why?

Prepared for Evaluation Work. Many learners shared feeling prepared for their workplace evaluation needs and provided ample examples of developing their individual and organizational evaluation capacity. A learner who was a long-time working professional "noticed that I am already starting to approach my work differently and in a strategic way." As a result, they felt prepared and "equipped to manage the projects I am currently working on as well as contribute my newly learnt knowledge to my team." Another learner explained applying and sharing their learnings to address a specific lack of capacity at their work:

> I already know the first step I will take in putting my new learning into practice is taking our staff team through an exercise of creating our first logic model and I am much more confident of how to do this than I ever would have been prior to taking this course.

One learner echoed this when they stated how, pre-UEval, they were always a "user, never a creator" of logic models at work. Another learner mentioned their funders' expectations of standardized reporting and how their former suggestions of other forms of reporting "was not received particularly well." However, post-UEval, they perceived "making better headway" by navigating their funders' reporting criteria with their UEval evaluation plan: "by presenting them

with a unison alternate evaluation plan, rather than questioning the necessity of different elements of their plan … and I do feel more capable in that respect now."

Similarly, some learners described their increased evaluation literacy as one example of their preparedness for evaluation work and its challenges. One learner referred to their pre-UEval struggle of only partially understanding their workplace theory of change and logic model conversations because they felt they lacked context: "for me it was trying to pick it up bit by bit without having it explained to me in the larger context of an evaluation plan." Likewise, another learner wrote that they perceived their role as equipped to participate in workplace evaluation conversations and efforts: "despite the fact that we have roles in our department dedicated to evaluation, I feel I'm in a much better position to contribute to the design process, engage in conversation and question the way we do evaluation." Other learners provided examples of how, due to their perceived competency gains, they felt equipped to understand and communicate their work projects more clearly, in a way "that will be understood by their team."

Another group of learners mentioned embedding frequent and ongoing evaluation efforts in their organizations as a response to some perceived evaluation barriers in their workplace. For instance, some learners referred to time as a barrier in "understanding that there was value in evaluating program and services but was … too busy to start something." Similarly, another learner recognized the "complexities of their programs" as the barrier that "made building evaluation tools seemed overwhelming." Lastly, another learner expressed a collective concern about evaluation in their workplace: "our team understood that evaluation is necessary, but many regarded collaborative development of evaluation plans as extremely painful." Many learners talked about fostering organizational evaluative culture as a way of addressing such barriers.

A learner concurred that they overcame thinking of evaluation as "reactionary," for their participation in UEval "influenced our commitment to making evaluation as part of practice, by seeking more intentional goals of having it planned versus reactive." Reiterating this, another learner contrasted their pre- and post- training view of the role of evaluation in their workplace:

> Our contracts and grants make it necessary to adhere to a rigorous reporting schedule, as we are responsible for providing our funders with the required information captured through surveys and reporting templates. Looking back, it was short-sighted of us to think of evaluation as a necessary evil, one in which we anticipated with dread every 6 months. We have emerged from a culture of guessing and decision making based on what we believe as best practice … to meaningfully engaging our stakeholders to check our assumptions and inform the work that we do.

Another learner who also worked in a large local organization mentioned that their competency gains helped them tailor their emerging evaluative role to their organizational context with a "rudimentary" understanding of evaluation as "did it work?".

> Complicated and complex projects within the [organization's] context lend themselves more to formative or developmental evaluations. … Those of us who work within the [organization] need to enhance our translation skills to be able to explain the difference between evaluation approaches to those who do not "live and breathe" this work.

Lastly, another learner pointed their manager's support to enable them to apply their learnings and foster organizational capacity building.

> My manager is very interested in these processes, and I have been able to explain the theory behind the processes that I will be using concisely. The collaborative development model that we will be using may then be shared with other teams within [our

> organization] to help embed evaluation practices in a more user-friendly manner than the current processes.

Socialization into the Profession. In addition to the many competency gains, UEval provided its learners with a networking opportunity with a local group of professionals serving their communities in similar fields of human services, healthcare, and evaluation. One learner defined UEval learners as a networking group of peers and explained the significance of peer-to-peer learning in facing similar professional challenges:

> After class I felt like we were muddling through the messiness together. I learned that I need to continue to surround myself with people who "get it" in order to learn vicariously through the failures, mistakes, successes, and triumphs of others.

As well, another learner cited the benefits of learning from and with intersectoral and interdisciplinary peers around community issues: "In learning from individuals in different fields, we come to better see the interconnectedness of issues and the impacts on systems and communities as a whole, rather than in isolation." Similarly, another learner echoed that "along with building my capacity as an evaluator, my contacts in the community and understanding of community issues has increased."

On a similar note, the learners expressed their commitment to build on their experiences of UEval to learn further about evaluation: "I definitely want to continue to learn and process the information, and then mobilize it in the everyday work I do and beyond. To make what we do even better and meaningful and relevant." Likewise, another learner described their commitment and responsibility to ongoing learning as emanating from their UEval learnings:

> I wish we had more time to develop some finesse, but I realize that expecting a drastic change after four days is unrealistic, so perhaps it is up to me now – take this knowledge and try applying it in my work.

To conclude, the qualitative portion of the study generated four final case themes: (a) Learning with and from one another, (b) learner perceived competency gains, (c) learners modeling community-engaged evaluation practice, and (d) learners building their evaluation capacity. This quote aptly summarizes the qualitative findings about the multiple aspects of effective evaluation practice and identity discussed in this chapter.

> While participating in case studies my knowledge and experience in becoming an effective evaluator have grown. I now can state that I understand what various ways to gather useful data in the needs of an evaluation and is effectiveness in the community. With my gathered networking through this course, I feel I am better prepared to understand what an evaluation is, its purpose and usefulness. I can now say I have the capability to with a degree of commitment, prepare my own evaluation plans.

Chapter 5: Discussion

This chapter will highlight some key study findings in depth and discuss connections to the evaluator education and constructivist social learning literature. This research aims to describe a case, UEval 2019, an evaluation institute at the University of Alberta, Canada, bounded by specific time, people and places to contribute to our understandings about how to develop, deliver, and assess effectiveness in evaluator education The subsequent three case learnings emanated from the case themes and answered the study research questions: (a) group process is essential for practical evaluator education, (b) interdependence of diverse perceived learner competency gains in practical evaluator education, and (c) relevant and multiple pedagogies enrich the group process in practical evaluator education As the findings indicated, group process was at the core of enhanced learning and it was also enriched by the multiple pedagogies of the course aligning with its activities and outcomes. Also, the perceived professional learner competency gains in the findings portrayed a holistic picture of multiple competency gains from different domains of technical, situational, and interpersonal building on each other.

Case Learning 1: Group Process is Essential for Practical Evaluator Education

In constructivist social learning, the increased learning or raised consciousness of the individual learner parallels that of their collective group and vice versa (Farnsworth et al., 2016). In this study, participants shared that learner negotiation is the central activity towards achieving effective group process, where learners need to be inclusive and iterative to negotiate as individuals so that they can work effectively as a group. Also, the participants described negotiation as the continuous cycle of meaning making of ideas and events through reflecting on their peers' contributions and responding to them to achieve consensus. That is, the learners

reflected on their own experience and learnings in relation to their peers and activities. The study findings suggested that effective group process required each learner's brainstorming and consensus building that led to the co-creation of the final evaluation plan. These study findings of participant experiences negotiating peer constructions align with the centrality of meaning making in constructivist social learning (Farnsworth et al., 2016). More specifically the constructivist methodology of the dialectic-hermeneutic, also described as the continuous interpretation-debate cycle in inquiry (Guba & Lincoln, 1989). Participants reported that supporting one another through brainstorming and consensus building brought them together as individuals and as a group to enhance their learning and transform their thinking. Participants referred to the effective group process leading to their enhanced learning as individual learners as well as the transformation in mindset and behaviour of the group, as the institute week progressed. Participants described the collective transformation as going from a group of random individuals to a cohesive one that was able to co-create an evaluation plan for the participating organizations. Likewise, the study findings indicated that improved group process influenced their perceived professional competency gains. Hence, the participants expressed feeling collective and equal ownership in the co-creation of the plan.

The findings suggested that while effective, goal-focused negotiation fostered individual learning and collectivism in a group setting, an ineffective, conflict-focused one fostered lack of learning and individualism. For example, some participants in this study characterized conflict-focused group dynamics as failing to achieve group process. Mostly, they described how it took one or two individuals to foster interpersonal conflict, following which the group was divisive and stagnant. This required the group to invest energy in managing the conflict rather than continuing to pursue group tasks. Participants emphasized that their group's focus on conflict led

to feelings of disengagement with each other and created hurdles towards co-creation. Similarly, Suiter et al. (2016) found that most group work was effective in enhancing learning. However, there were a few instances of difficult team dynamics that influenced group process because of differing personalities and working styles. The result of conflict-focused group process was less contribution from participants, partial consensus, and a weakened final evaluation plan. In case learning 3, I will elaborate further how learners described the inner workings of the effective or enriched group process.

Building a Community of Practice

One way that UEval meets its diverse learners' needs of community and university is to socialize them for evaluation practice through building a community of practice. Social learning theorist Wenger (1998) suggested communities of practice (CoP) as an example of peer-to-peer social learning whose members share the goal of gaining and applying knowledge within a specific cultural and historical context. For instance, the intersectoral and interdisciplinary learners of UEval shared the common agenda of learning and applying evaluation to their contexts, despite their differences in education and profession. Based on this definition, I suggest that UEval learners comprise a group of evaluation learners with the characteristics of a CoP. Wenger theorized that CoP participants negotiated their experience in four areas: their sense of competence, identity, community, and practice (Farnsworth et al., 2016). Like CoP participants working together to gain new competencies (Wenger, 1998), UEval participants described their experience of negotiating what they were learning, or their negotiation in competence. Participant examples included their experiences of applying and rectifying newly learned concepts based on their conversations with their peers. As this study indicated, the participants perceived themselves advancing from individuals lacking in confidence in evaluation to

perceiving themselves as competent and prepared for the workplace. These experiences of competence and identity progression directly align with Nowariak's (2014) summary of their findings about the learners of the Minnesota Evaluation Institute: "finally, the student herself, steering a larger bike without training wheels, reflects someone who is more confident in her skills and has a better sense of who she is as an evaluator and where she wants to go" (pp. 60-61).

Also, as this study indicates, the learners discussed aspects of socialization into the profession related to a community of practice. The participants referred to the feeling of excitement in the room of being part of a larger network of learners and practitioners. Participants envisioned themselves as community-engaged evaluators, where the perceived identity is an example of learning as negotiation of the interconnected competence, community, and practice. That is, while the learners negotiate their competence, their identities and their new community of peers continue to be shaped in relation to the topic they learn together (Farnsworth et al., 2016). As well, the participants negotiated community and practice when they perceived other UEval participants as part of a valuable professional network with similar professional interests or values. That is, the learners negotiated in what ways they belong to this community or have a shared identity in common. Therefore, the participants envisioned their future professional selves as joining a real-life evaluation community of practice to rely on the shared experience and wisdom of their colleagues or contributing to the socialization of the profession. The findings from this study, then, support Nowariak's (2014) conclusion that participants found the Minnesota Evaluation Institute as beneficial for networking and future employment prospects.

Case Learning 2: Perceived Learner Competency Gains are Interdependent in Practical Evaluator Education

The quantitative study findings provided evidence of learning to assess the effectiveness of UEval using changes in perceived competency gains of UEval learners from pre- to post-course. Overall, the learners in the current study reported in post-course having moderate to high levels of competency gains across all five domains: reflective, technical, situational, managerial, and interpersonal. The study results showed significant self-reported changes in mean scores across the two time points. These findings are consistent with previous studies showing increase in learner competency gains in experiential, community-engaged and competency-based teaching of program evaluation (McShane et al., 2015; Nowariak, 2014; Poth et al., 2020). The qualitative sources of reflection and focus group findings also indicated an increase in perceived learner competency gains following their participation in the institute.

Many participants mentioned perceived gains in all five CES competency domains and identified them as interdependent, where multiple gains across different competency domains built on each other**.** These multiple gains built on the UEval activities that targeted multiple competencies, such as building the components of the evaluation plan, and consensus building. The interdependence of competency domains during learning mirrors how evaluators employ multiple and overlapping competencies in their practice (Gullickson, 2020). The participants emphasized some domains more than others for community-engaged practice, as I will discuss below. As the participants' experiences in this study indicate, consensus building relied heavily on learners negotiating multiple stakeholder constructions in all its stages. As mentioned earlier, the participants described consensus building as comprised of five progressive stages: (a) "listening" actively and empathetically to teammates with no judgement or reservations, (b)

providing “constructive feedback” to teammates about their shared ideas, (c) “negotiating” which of the shared ideas should be included in the evaluation plan, (d) “recognizing” each other’s’ unique strengths and (e) “synergizing” and “maximizing” group ideas and efforts through collaboratively dividing tasks in alignment with learner strengths requiring diverse set of competencies at each stage.

As the participant experiences in this study indicate, competency gains in the technical domain were essential in addressing their self-identified insufficient evaluation literacy levels. The Participants spoke extensively about their pre-UEval evaluation literacy levels contributing to their perception of evaluation as mystifying. Their gains in the competency domain helped them build the learners’ coherent knowledge necessary in addressing workplace evaluative demands. Many participants characterized their pre-UEval experience of participating in organizational evaluation with other staff as daunting and discouraging. For instance, they felt that they could not contribute to evaluation discussions because they found their colleagues’ use of certain evaluative language and logic exclusionary. Like any other profession, evaluation as an academic discipline and professional practice possesses its own language and values (Gullickson, 2020) that may seem inherently alien to staff who encounter evaluation in their work. In these instances, participants referred to their colleagues, but not external evaluators, when referencing their struggles with evaluation literacy in their workplaces.

The participants’ use of structural language to describe their competency gains represents their improved and coherent understanding of evaluation. The learners repeatedly expressed feeling a sense of clarity because of their technical competency gains, post-UEval. As a result, in contrast to being passive and unsystematic in the past, the learners envisioned themselves as being active and systematic in their future evaluation efforts. Their use of terms like clarity,

structure, and parameters to describe their technical competency gains were in alignment with the course outcomes of CES competency gains. For instance, the CES (2018) technical competency domain includes competencies such as clarifying and framing the purpose, questions, and scope of the evaluation. Similarly, the participants' descriptions align with the Better Evaluation's Rainbow Framework (2014) use of similar structural language to manage, define and frame the parameters and boundaries of an evaluation.

The study findings showed the learners' need for arrival to consensus through enriched negotiation with their diverse peers and the key informant enhanced their perceived gains of soft skills in the situational and interpersonal domains. Therefore, the group process on the community-based cases of UEval encouraged technical as well as situational and interpersonal competency gains of learners. For instance, the study participants referred to the gains in the situational domain about significance of understanding stakeholder context as part of professional and community-engaged practice. These findings of interdependence supported the acknowledgement in the literature that the learner gains of "soft" and "hard" competencies are not mutually exclusive (Gullickson & Hannum, 2019; Nowariak, 2014). The case-based learning with its varying activities targeting multiple competencies answers the ongoing call in the literature for the need for practical training opportunities targeting interpersonal and situational competency gains in evaluator education (S.M. Johnson, 2018; Nowariak, 2014). In other words, the findings from this study suggest that instructors need to balance course outcomes enhancing technical and practical aspects of competencies, since overemphasizing one at the expense of the other will fail to adequately prepare learners for the workforce (Boyce & McGowan, 2019; Gullickson et al., 2019; Lee et al., 2007). Since it is not uncommon for evaluators to learn interpersonal competencies while on the job (Chouinard & Boyce, 2017; S.M. Johnson, 2018),

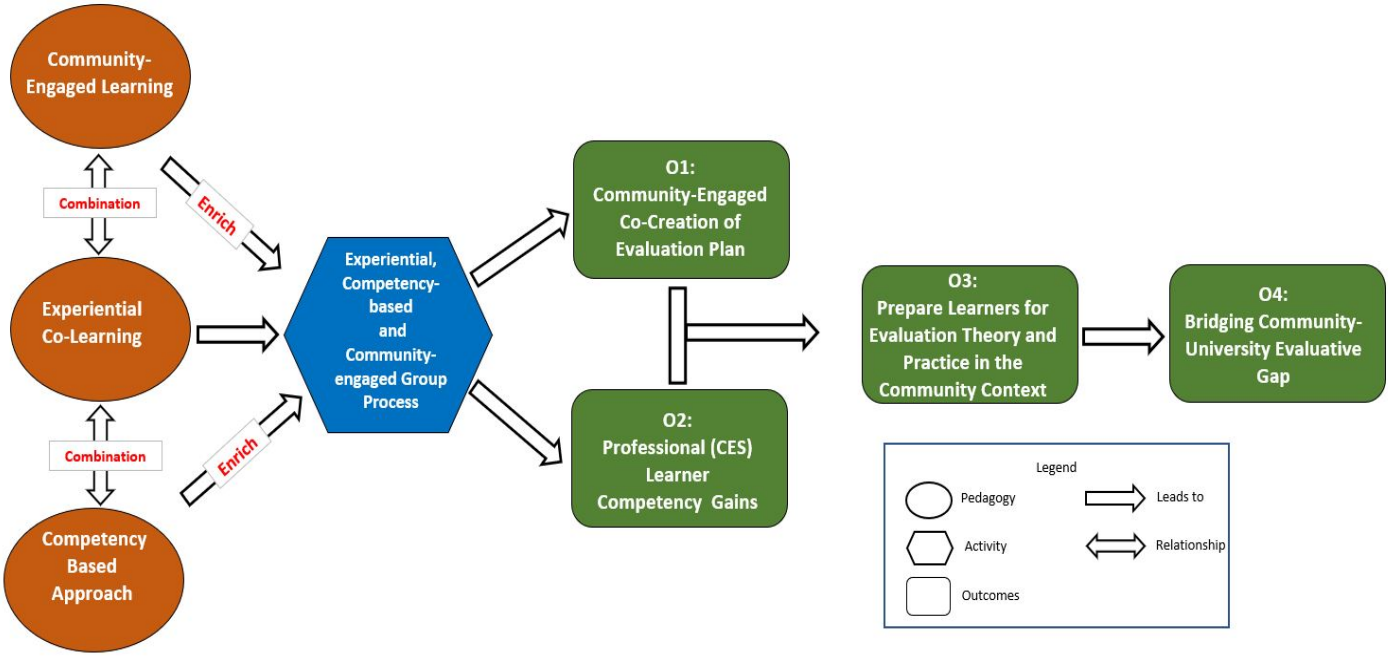
then the experiential, reciprocal and dialogical activities comprise a significant contribution towards enhancing specific competencies and values relevant to the competency-based and community-engaged outcomes of the course.

Case Learning 3: Relevant and Multiple Pedagogies Enrich the Group Process in Practical Evaluator Education

Through using relevant pedagog(ies) in the classroom, UEval meets diverse learner needs by preparing them for effective practice outside of the classroom. UEval incorporates three course pedagogies: experiential co-learning, competency-based approach and community-engaged learning (see figure 3). As the study findings showed, the pedagogical combination refers to UEval's intentional combinations of multiple pedagogies to enhance UEval group process and outcomes. As can be seen in figure 3, each of the three pedagogies on the left represented in the brown colour are associated with the main activity of the course, the experiential, competency-based and community-engaged group process, as coloured in blue and situated in the middle. Importantly, the experiential, co-learning pedagogy alone would have resulted in the experiential group process. However, what is unique about the case of UEval is its strategic incorporation of community-engaged and competency-based with the experiential co-learning to enrich the group process. As I will discuss below, these pedagogies allow for enriched learner negotiation and consensus building towards effective, goal-focused group process, as mentioned in case learning 1. Due to the pedagogical combination, the group process functioned as a medium for enriched learner negotiation with opportunities for learners to improvise on aspects of the final evaluation plan. Understanding pedagogical combination answers the qualitative sub-research question about the learners' and facilitators' description of the course pedagogies influencing learner experiences related to competency gains.

Figure 3

Pedagogical Combination



One way to identify effective teaching is through the alignment of course activities, outcomes, and pedagogies (Lavelle et al., 2020; Oliver et al., 2008). Understanding this alignment helps ensure that the intended classroom design unfolds as the instructor had intended. As mentioned earlier, the combination of the three pedagogies informed learner interactions in group process and rendered the experiential, competency-based and community-engaged group process as a medium for enriched learner negotiation. UEval findings showed that university students and community working together as co-learners on real-life, community-based cases influenced learner experiences positively. Pedagogical alignment indicated the community-engaged pedagogy helped enrich the group process so that it resulted in community-engaged co-

creation of the final evaluation plan, which is outcome 1 (O1), as demonstrated in the green colour on the far right of figure 3. As well, the incorporation of the competency-based pedagogical approach ensured that the learner gains during the enriched group process aligns with intended course outcome 2 (O2) of current professional (CES) competencies. Hence, these pedagogies and the group process prepare learners for the 3rd course outcome of evaluation practice in the community context (O3): prepare leaners for evaluation theory and practice in the community context. In the next section, I will discuss the learners' description of diverse group activities and diverse peer ideas within the enriched group process contributing to enriched final evaluation plan and perceived professional competency gains.

The multiple pedagogies aligning with the group process enriched it through iteration, inclusion and dialogue. As mentioned in case learning 1, the participants found that the litmus test for effective, goal-focused negotiation is the group transformation to a cohesive unit that prepared an enriched final evaluation plan by the end of the week. According to the learners, the enriched group process was comprised of dialogical, experiential, egalitarian and competency-based activities that contributed to their enhanced learning. The study participants discussed how the group process provided opportunities of applying their online and in-class competency gains from theory to practice with their peers. Other examples of enriched negotiation activities included intentionally seeking the input of other learners and refinement of concepts with peers and community partners. Despite being short on time, many learners cited the iteration or refinement of ideas as significant for enhanced learning in the group process, perhaps implying their gained appreciation of collective work emanating from the community-engaged process.

UEval participants recognized the real time and diverse peer participation in their case study groups as significant to peer-to-peer learning, one of the hallmarks of community-engaged

co-creation. The experiential and community-engaged pedagogies guided the learners' equal and inclusive perception of one other by viewing each other's input or constructions as valid and relevant. University students perceived the community and vice versa as their co-learners and equals in responsibility and knowledge. The multiple and diverse peer meanings contributed to peer-to-peer learning, where community and university modeled each other's behaviour and benefited from the others' unique perspectives because of diverse academic backgrounds and professional experiences. The diverse perspectives of eight individuals around the table further enriched the application learnings. Previous evaluator education initiatives (Nowariak, 2014) have had two students assigned per case group. However, the community-engaged process required a relatively large number as well as diverse perspectives to negotiate the contents of the final evaluation. While initially the learners found navigating through many and diverse ideas as challenging, they also shared that working in a group of eight provided them with sufficient opportunities to negotiate meanings and learn from one another.

As well, the participants referred to a second characteristic of community-engaged co-creation: their perceived community-engaged worldview influencing their understanding of the program context with the key informant and future work with the stakeholders. This thesis finding supports the claim in the literature (Chouinard et al., 2017; Gullickson & Hannum, 2019) about the evaluator's values informing their evaluative judgement about the merit, worth and significance of a program. Consensus building with eight learners per case was demanding but equally rewarding learner experience in the group process. The experiential group process was enriched through the addition of the community-engaged and the competency-based approach and resulted in equally rich final evaluation plans and perceived professional competency gains for learners.

Chapter 6: Implications, Limitations and Conclusion

In this chapter, I will situate the implications in alignment with the purpose of the study, which was to describe a case, UEval 2019, an evaluation institute at the University of Alberta, Canada, bounded by specific time, people and places to contribute to our understandings about how to design, deliver and assess effectiveness in evaluator education. Although the implications from this study are presented in relation to the interconnected design, delivery and assessment, some of the ideas are relevant to more than one of the three. Additionally, I will share how these implications have the potential to inform other evaluator education initiatives. Throughout, I will refer to the capacity building and community-engaged aspects of UEval as equitable, inclusive as well as socially transformative (Janzen et al., 2017). I will then briefly mention the limitations of the study and future directions. Lastly, I will end the chapter with some concluding statements about the research.

Design

A course pedagogy with associated learner activities and outcomes can serve as an instructor guide for teaching and learning. Evaluation educators need to be intentional in their course design to create certain types of individual and collective class activities and learner experiences. The study findings revealed that the intentional and co-created design of UEval was useful in enhancing learner perceived competency gains. As mentioned in the introduction chapter, UEval was purposefully unique with its learning advisory committee, comprised of university faculty, community partners and a representative from the local CES chapter, co-creating and designing the institute curriculum. If applicable, inviting colleagues and community to co-create the curriculum will enrich a course design. Community-university partnerships cannot be understated as critical to the success of such co-created designs.

Most graduate courses can be insular with learners attending from the same department. However, through bringing interdisciplinary and intersectoral diverse learners to the classroom for case-based learning, UEval intersects at the three system levels of evaluator education: classroom, university, and community (Poth et al., 2020). UEval was effective in meeting the needs of diverse learners because the activities and outcomes of the institute intersected with the learner needs. UEval as an evaluator education case is unique because it intentionally combined the three pedagogies of experiential, co-learning, community-engaged and competency-based learning. The combination of the pedagogies supported the ability of diverse learners with differing epistemologies to engage in the group process effectively and co-create the final evaluation plan. Like the advisory committee co-creating in the design phase, the learners from university and community co-created the final evaluation plan during the course delivery. Based on the study findings, the way UEval pedagogies informed the course activities and outcomes might be relevant to some instructors, if they intend to integrate relevant pedagogies within their context. First, UEval combined the competency-based approach with relevant pedagogies that align with one another philosophically and methodologically. For instance, the experiential co-learning and community-engaged pedagogies have a stakeholder-centred focus and position learners to be active and equal participants in collective pedagogical activities (Farnsworth et al., 2016; Janzen et al., 2017). Second, UEval also met diverse learner needs because of the pedagogical alignment comprised of its effective group process as the central activity of the course leading to effective course outcomes. The findings showed that the level of individual learner contributions informed whether the group would achieve enriched negotiation and effective group process collectively. As well, the findings about inclusiveness, iteration and equity in in group process align with the inclusive and equitable course outcomes. Peer-to-peer

learning in group process is an indicator of increased learner engagement, where learners from community and university guided each other's learning and to enrich the final evaluation plan as well as enhance learner perceived competency gains.

Through inviting the community to the classroom, UEval legitimizes the traditionally marginalized experiential knowledge (Janzen et al., 2017; B. Wenger-Trayner et al., 2019) rendering the traditionally academic discipline of evaluation as less mysterious and more accessible, as participants pointed out. UEval "collectively created a greater sphere of influence" (McBride et al., 2020, p. 125) in university and community through individual and collective evaluation capacity building. On a more practical level, the institute and its case-based learning was successful in addressing the evaluative needs of university students for experiential and real-life learning with community partners. Equally, case-based learning provided community partners with necessary skills and support to build an evaluation plan for their organization through a formal university course. As an accessible evaluation institute, UEval addresses the evaluative capacity building needs of organizational learning for community and experiential learning for university students. The combination of pedagogies elevated the level of experiential group process to the more enriched experiential, community-engaged and competency-based group process. Therefore, the group process aligned with the course outcomes and learner needs from community and university to prepare them for evaluation in the community context.

Organizational Capacity Building

Many community partners specified their reasons for attendance at UEval was to take on more evaluation responsibility at work or build needed capacity. Some study participants mentioned the significance of garnering the support and approval of their organizational leadership for increased access to organizational evaluative resources and capacity. The study

findings showed how community partners used to perceive evaluation as an annual nuisance when facing externally imposed deadlines, pre-UEval. As this study concluded, community partners experiences increased literacy through diverse perceived professional competency gains, confidence, and perceived agency around evaluation. In contrast, they identified their UEval attendance as a learning and reflective opportunity that allowed them to rethink their traditional perception of evaluation in their workplace from an external imposition to an inherent need. The learners expressed that they no longer feared or disliked evaluation but embraced its intrinsic value as a form of systematic inquiry, post-UEval. Interestingly, many community partners pointed out that individual competency gains alone did not comprise the sole outcome of their learning, but also knowing how and when to use them. The participants expressed their intentions to apply their learnings in their current workplace, post-institute. They mentioned doing so by identifying and addressing areas that lack in evaluation capacity in their workplaces. Since the learners wrote the reflection within two weeks after the completion of the institute, their reflections on workplace application constituted a future projection. Having said that, some participants mentioned already applying their learnings in their workplace, even within the short time frame.

In addition to community partners, UEval also helped build the capacity of graduate students as possible future evaluators and instructors. Alongside faculty members, several graduate students also participated as co-facilitators in UEval 2020 and 2021 offerings and built their capacity as emerging evaluators. By the same token, organizations and university students may benefit from a mutually beneficial second phase of the implementation of the submitted final evaluation plan.

Delivery

Condensed delivery is unique to UEval. The condensed time frame may have advantages for rapid course completion for some community partners and learners. The main course activity was comprised of real-time brainstorming and consensus building with diverse peers and community partners**.** Although many learners characterized the deadline of producing a draft evaluation plan by the end of one week as a positive factor, the short timeframe of the institute also put some group negotiation to the test. For instance, some participants reported struggling to prioritize their own personal learning needs with the immediate and multiple group needs in the afternoons. Therefore, one-week might be short in some contexts and for some learners, as the entire work is done within the group with little time for personal reflection or additional work. Over the course of 4 days, learners had to conserve their energy for the next day's morning lectures and applications prior to working on the case study again. The downside of such rushed learning perhaps is not having had the opportunity to build more interpersonal or facilitation skills.

Having a facilitator guide the learners through the process was essential. Some learners and key informants expressed relief about having the facilitator as a resource. The facilitators guided the learners in the group process, while also co-constructing knowledge alongside them. Facilitators played a negotiating and coaching role in the group process to help facilitate intense learner improvisation and experiences. The facilitators had to be highly cognizant as to when to provide space for independent learning for the group and when to bring their expertise to steer the group to their final target of completion. In addition, facilitators had to pay attention to the mood and interactions among individual learners and the group dynamics to keep them focused on negotiation and consensus building.

Considering a longer course timeline of a typical 13-week semester course might also have its advantages, as has been demonstrated in other evaluation education initiatives (McShane at al., 2015; Poth et al., 2020). In some courses, the community participated outside of the classroom as program and information resource. This arrangement might provide learners with more time to reflect, read and refine the components of the evaluation plan in-between their meetings with their assigned stakeholders. Likewise, this would provide more space for the attending key informants to reflect and provide feedback to the group on the emerging components of the evaluation plan. Although the facilitator role is paramount in UEval because of the time constraints, the need for one might be lessened in a longer course delivery because learners have more time to prepare and reflect on the content of the evaluation plan.

Assessment

In this study, assessment refers to the graded assignments in the course, such as and second, pre-post CES self-assessment questionnaire, learner final reflection assignments and the final evaluation plan. The final evaluation plan served as a teaching tool and provided authentic evidence of the learners' professional competency gains in the course. The second meaning of assessment refers to the study's employment of these assignments for assessing UEval learner effectiveness. This study used the above-mentioned assessments as multiple sources of evidence for the learner perspectives and description of the case**.** Because the data sources were embedded in the assignments of the course, they conveniently required only self-reporting throughout the course timeline. Therefore, secondary data analysis was feasible, as it reduced the participant burden of providing additional participant time for research. Even with this advantage, the time between a condensed course and the final reflection as a research tool was less than ideal. The disadvantage of using reflection as an assessment tool only two weeks after the institute possibly

included learners not capturing everything that they had experienced and learned within one week. Similarly, perhaps the learners under-reported their perceived competency gains in their quantitative self-assessments. As an additional source of evidence of student experience and competency gains, this study employed a second qualitative method of focus group with the facilitators

Study Limitations and Future Directions

Three important limitations need to be considered when interpreting the findings from this study. First, because this study relied on the secondary analysis of existing data collected as part of the assessment of UEval, it was limited to what questions were asked and what participants were able and willing to share in the course reflection, facilitator focus group and self-assessment pre-post survey. Second, although my participation in UEval 2019 as a learner helped me to contextualize the data and the experience of the learners and facilitators, it could not replace the researcher-participant meaning making in primary data generation during iterative data generation and analysis (Mayan, 2009). Primary data generation would allow the researcher to experience the phenomenon with participants through immersing themselves in the research context (Stake, 1995). For instance, because the focus group as a method primarily relies on understanding interactions between participants (Mayan, 2009), the additional elements that may have been captured further through an audio recording or direct participation were missing. In future case research, it is recommended that additional data be collected. For example, conducting follow-up interviews with key informants is necessary to understand if and how their final evaluation plans were implemented. Third, the use of self-reported competency assessment may not have completely aligned with the participant's social reality (Mertens & Wilson, 2012) nor was my sample sufficiently large to compare community and university

learners. In future research, it would be useful to gather data from a larger sample size to examine changes by learner type of community and university. Lastly, s2020 and 2021, UEval was offered online because of the pandemic., it would be interesting to compare the face-to-face versus online deliveries to determine possible differences in the learners' perceived competency gains and experiences.

Conclusion

Evaluation practice and identity are cultural products supported and influenced by a wide variety of factors (Sturges, 2011). Effective evaluator education is the ongoing and necessary medium that contributes to this professionalization, while also being influenced by it. The 2019 UEval in-person pilot was a unique case of an evaluation institute in a specific place and time. As a fast-paced one week institute, UEval employed community-informed, case-based learning, while university students worked alongside community partners to enhance the group process, leading to a community-engaged co-creation of their final evaluation plans. Through inviting the community to the classroom, UEval builds their capacity and helps meet their organizational needs while providing university students the opportunity for experiential, community-engaged and competency-based learning.

This multiple-methods case study aimed at exploring UEval's effectiveness as an evaluator education initiative in preparing its learners for evaluation practice in the community context, mainly, through understanding the study phenomenon of learner experiences related to perceived competency gains. To answer its qualitative and quantitative research questions, the study employed written reflections as one of its qualitative data sources, an apt instrument for a profession that is narratively shaped around the personal and professional stories of evaluators (Schwandt, 2018b). As well, two additional data sources were employed: a focus group with

seven facilitators and a quantitative, pre-post self-assessment questionnaire The following four case themes emerged from these data sources: (a) learning with and from one another, (b) learner perceived competency gains, (c) learners modeling community-engaged evaluation practice, and (d) learners building their evaluation capacity. The subsequent three case learnings emanated from the case themes and answered the study research questions: (a) group process is essential for practical evaluator education, (b) the interdependence of diverse perceived learner competency gains in practical evaluator education, and (c) relevant and multiple pedagogies enrich the group process in practical evaluator education. UEval provides an example of community-engaged and pedagogy-informed evaluator education initiative as well as it leaves opportunities for further probing into how we think, teach and learn about evaluation.

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Appendix A: CES Pre- Post Questionnaire:

Competencies for Canadian Evaluation Practice

1. Reflective Practice competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.

    1.1 Knows evaluation theories, models, methods and tools and stays informed about new thinking and best practices.

    1.2 Integrates the Canadian/US Joint Committee Program Evaluation Standards in professional practice.

    1.3 Integrates the Canadian Evaluation Society's stated ethics in professional practice and ensures that ethical oversight is maintained throughout the evaluation.

    1.4 Considers the well-being of human and natural systems in evaluation practice.

    1.5 Provides an independent and balanced perspective in all aspects of the evaluation.

    1.6 Is committed to transparency in all aspects of the evaluation.

    1.7 Uses self-awareness and reflective thinking to continually improve practice.

    1.8 Engages in professional networks and activities and contributes to the evaluation profession and its community of practice.

2. Technical Practice competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.

    2.1 Clarifies the purpose and scope of the evaluation.

2.2 Assesses program evaluability.

2.3 Clarifies the program theory.

2.4 Frames evaluation topics and questions.

2.5 Develops evaluation designs.

2.6 Uses appropriate evaluation methods.

2.7 Identifies data requirements, sources, sampling, and data collection tools.

2.8 Collects, analyzes and interprets data using appropriate methods.

2.9 Uses findings to answer evaluation questions and, where appropriate, to develop recommendations.

2.10 Produces complete and balanced evaluation reporting to support decision-making and learning.

3. Situational Practice competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.

3.1 Examines and responds to the multiple human and natural contexts within which the program is embedded.

3.2 Identifies stakeholders' needs and their capacity to participate, while recognizing, respecting, and responding to aspects of diversity.

3.3 Respects all stakeholders and strives to build and maintain trusting relationships.

3.4 Promotes and facilitates usefulness of the evaluation process and results.

3.5. Identifies and responds to changes in the context of the program and considers potential positive and negative impacts of the evaluation.

3.6 Engages in reciprocal processes in which evaluation knowledge and expertise are shared between the evaluator and stakeholders to enhance evaluation capacity for all.

3.7 Uses evaluation processes and practices that support reconciliation and build stronger relationships among Indigenous and non-Indigenous peoples.

4. Management Practice competencies focus on applying sound project management skills throughout the evaluation project.

4.1 Provides leadership to the evaluation project.

4.2 Defines work parameters, plans and agreements for the evaluation.

4.3 Identifies and effectively uses required human, financial, and technical resources.

4.4 Coordinates the work of other team members.

4.5 Uses group management and facilitation skills.

4.6 Communicates project progress to all concerned.

5. Interpersonal Practice competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.

5.1. Uses communication strategies appropriate to the cultural, linguistic, social, and political context.

5.2 Demonstrates effective and appropriate written and visual communication skills.

5.3 Demonstrates effective, appropriate, and respectful verbal and non-verbal communication skills.

5.4 Uses a variety of processes that result in mutually negotiated agreements, shared understandings and consensus building.

5.5 Builds partnerships within the evaluation context.