



PROPOSED POSITION ON QUALIFICATION IN EVALUATION AND POSSIBLE ROLE FOR IDEAS

IDEAS Certification Working Group¹

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1. BACKGROUND

1.1. Context

There is a growing demand for more professionalization and qualification of evaluators, including possibly certification. This demand arises from governments (at national and sub-national demand), donors and international organizations, providers of evaluation services as well as evaluators themselves.

The profession of evaluator is young. There is no professional order of evaluators. There are a number of national and regional evaluation associations as well as one international evaluation association, IDEAS.² However, apart from a few of them, many have still limited memberships and activities.

IDEAS is wondering what should be its position vis-a-vis evaluator qualification, and what could be its role and that of other institutions.

IDEAS 2009 survey results (122 responses out of 250 members) indicate that:

- 91% of respondents say a Competencies Framework for International Development Evaluators is needed;
- 61% believe a skill set on evaluation design is most important element of competencies;
- 92% strongly agree or agree that a Competencies Framework for International Development Evaluators will promote professionalization ;
- 66% see a role for IDEAS to develop its own competencies framework for international development evaluators;
- 78% see a role for IDEAS to determine skills that international development evaluators should possess;
- 83% see a role for IDEAS to identify evaluation training related to the competencies;
- 40% support the idea of IDEAS playing a key role in a certification system;
- 60% think that IDEAS needs higher recognition to be in charge of a credentialing system.

There is a strong endorsement to develop and establish a professional competency framework for international development evaluators. The agreement is weaker but still considerable for IDEAS as a certifying institution.

1.2. Existing qualifications in monitoring and evaluation

Two (2) countries have a credentialing system for evaluators:

- Canada: the Canadian Evaluation Society (CES) has designed and implemented the CES Credentialed Evaluator or Professional Designation Program (PDP) since 2011 and had certified 132 professionals up to 2013. This Certification considers one level only. Certification is based on education, competencies, and experience (<http://evaluationcanada.ca/site.cgi?s=5&ss=16& lang=en>);
- Japan: the Japan Evaluation Society (JES) has developed a Certified Professional Evaluators (C.P.E.) 6 day Training Program. The program includes three (3) levels (basic, middle, advanced). Certification is based on training plus exam, not experience (http://www.idcj.or.jp/9evaluation/CPE4_0.html).

² Evalpartners identified 158 VOPEs, out of which 135 are at national level, while 23 at regional and international level. See <http://www.mymande.org/evalpartners/international-mapping-of-evaluation>.

The United Kingdom Evaluation Society (UKES) and the European Evaluation Society (EES) are developing credentialing systems for their members.

The USA (AEA) considered credentialing, but decided against it because there was strong opposition from their membership.

1.3. Other relevant initiatives

There are also university certification programs in evaluation, including among others:

- Claremont Graduate University non-residential Certificate of Advanced Study in Evaluation: 16 weeks of distance-based evaluation courses + 1 week of professional development workshop + Attendance of AEA conference + competence-based exam; taught in English
<http://www.cgu.edu/pages/670.asp>
- University of Minnesota Program Evaluation Certificate: 1 semester coursework
<http://www.cehd.umn.edu/olpd/grad-programs/ES/programeval-cert.html>
- University of Victoria online Graduate Certificate (4 semesters) and Graduate Diploma in Evaluation (certificate + capstone project)
<http://www.uvic.ca/graduatestudies/programs/home/programdescriptions/programs/evaluation-certificate.php>
- Georges Washington University 3 course-based Certificate Programs of The Evaluator's Institute: Evaluation practice, Advanced evaluation practices; Analytic evaluation methods; Master Evaluator Certificate (MEC) awarded after completion of two course-based certificates: the Certificate in Evaluation Practice and the Certificate in Advanced Evaluation Practices, and after completion of a portfolio of experience developed with the guidance of a mentor; 30 days; taught in English
<http://tei.gwu.edu/certificate.htm>
- University of Ottawa Graduate Certificate Program in Program Evaluation; 1 year full time equivalent; taught in English or French;
http://www.socialsciences.uottawa.ca/crecs/eng/grad_cert_prog_eval.asp
- Carleton University's Diploma in Public Policy and Program Evaluation (or DPE); can be completed in 15 months while working full time.
<http://www5.carleton.ca/sppa/academics/grad-diplomas/public-policy-and-program-evaluation/>
- International Program in Development Evaluation Training (IPDET) sponsored by IEG/World Bank and Carleton University in Evaluation; taught in English; 2 weeks (80 hours) core program + 2 weeks of workshops among choice of 26 2-3 day workshops at intermediate or advanced level; taught in English; French version offered (PIFED) by ENAP started in 2011.
<http://www.ipdet.org/>
<http://international.enap.ca/international/1434/Presentation.enap>

- University Certification in Monitoring and Evaluation awarded by the IDEA international Institute and University Laval; graduate program; three 2 weeks certifications respectively on monitoring, evaluation management, and information systems for M&E; taught in English, French, and Spanish
http://www.idea-international.org/en/expertise/capacity-building/university-certifications/index.html?sword_list%5B0%5D=certifications

The newly accredited CLEAR centers in the LAC and Asia regions are also planning to offer university certifications in the future.

There are also several diplomas in Monitoring and Evaluation offered by several universities around the world, for example the Pontificia Universidad Catolica del Peru.

There are also a number of Communities of Practices (CoPs) that have an interest in evaluation qualification. Among them are networks of practitioners in Results-Based Management (RBM) in the public sector, including networks in Monitoring and Evaluation, which the World Bank and Regional Development banks are supporting. The most dynamic ones are in Latin America (Comunidad de Profesionales y Expertos en Latinoamérica y el Caribe en Gestión para Resultados en el Desarrollo - CoPLAC-GpRD, including the Red de Monitoreo y Evaluación - REDLACME) and in Asia (Asia-Pacific Community of Practice on Managing for Development Results (APCoP).

2. QUALIFICATION OBJECTIVES, TARGET GROUPS, AND RELEVANT COMPETENCIES

2.1. Objectives

The objectives pursued in this qualification process are the following:

- Guarantee a certain level of education, experience and specific competencies of an evaluator to a potential client interested in hiring her/his services
- Help promote the career of qualified professionals
- Promote the professionalization of evaluation
- Promote IDEAS notoriety and membership (which would be a requirement for qualification)

2.2. Type of professionals to be qualified

There are two kinds of potential target groups:

- **Evaluators** that conduct evaluations of policies, programs and public projects, typically individual consultants or professionals who work within firms;
- **Commissioners of evaluations** who are working within the public sector or for a donor organization and manage/monitor programs and projects and hire outside consultants to conduct evaluations, typically Monitoring & Evaluation Department managers, technicians working in M&E Departments, and technical program managers.

These are two groups with different competency requirement. The first group has more capabilities in qualitative and quantitative analysis (e.g. organization of surveys and data analysis). The second group requires a minimum of technical skills in evaluation per se (e.g. enough to assess the quality of an evaluation design or report), but they should have also competencies in project monitoring, procurement

of evaluator consultants; management contract and communication of the results of the evaluations for decision-making and accountability within the public sector.

In IDEAS are present both kinds of professionals.

2.3. Competencies in evaluation to be qualified

While everybody agrees that evaluation requires a range of competencies, there is no unique vision about what those should be. Two organizations have made an effort to establish a set of competencies.

Canadian Evaluation Society

The CES considers five (5) domains of competencies in evaluation:

- Reflective practice competencies: fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth;
- Technical practice competencies: specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting;
- Situational practice competencies: application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied;
- Management practice competencies: process of managing a project / evaluation, such as budgeting, coordinating resources and supervising;
- Interpersonal practice competencies: people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.

IDEAS

The IDEAS competencies framework is based on several premises:

- There is a core set of competencies that all who are development evaluators or development evaluation managers should look to, wherever they work;
- The core competencies are the same whether the development evaluators or development evaluation managers work for a bilateral development organization, a developing country ministry, a large or small non-profit, or a university;
- Each organization will have its own context-specific competencies to add to this core set;
- There are different sets of competencies for international evaluation commissioners and evaluators.

The identified Competencies for Commissioners of international development evaluations include the following:

- 1.0 Understands and Upholds the Integrity of the Evaluation Process
- 2.0 Understands and Acts on the Need for Communication throughout the Evaluation Process
- 3.0 Supports Evaluation Access to People and Records and the Public's Right to Information
- 4.0 Respects the Terms of Agreement
- 5.0 Pursues Action on Recommendations from an Evaluation
- 6.0 Supports Monitoring and Evaluation

The identified Competencies for Managers of international development evaluations include the following:

- 1.0 Professional Foundations
- 2.0 Monitoring Systems
- 3.0 Evaluation Planning and Design, and costing
- 4.0 Managing the Evaluation
- 5.0 Conducting the Evaluation
- 6.0 Communicating Evaluation Findings
- 7.0 Promoting a Culture of Learning from Evaluation

IDEAS has also proposed a Code of Ethics for evaluators.

3. OPTIONS FOR QUALIFICATION OF PROFESSIONALS IN EVALUATION

Several options exist for qualification, which carry out different implications. The following table outlines key options for qualification of professionals in evaluation and is adapted from Gussman Associates Inc. (2005)³.

3.1. Licensing

Table 1: Characteristics of Licencing

Definition	Qualifying institution	Implementation Strategies/Options	Time horizon	Pros	Cons
Licensing authority tests candidates to national standards and issues license giving the holder a legal right to perform certain duties	Licence typically granted jointly by public authorities and professional associations /boards	<ul style="list-style-type: none"> • Setting up national standards • Conducting negotiations with relevant government bodies • Setting up licensing agency • Organizing collection of fees and renewals • Setting up redress mechanism 	8-10 years	Adherence to stringent standards would ensure evaluators have desired skills	<ul style="list-style-type: none"> • Need to negotiate with relevant government bodies and professional groups • Administrative complexity and high costs • Enforcement and monitoring needed • Potential for legal challenges • Need for redress body/mechanism

³ T. K. Gussman Associates Inc. (2005) *Improving the Professionalism of Evaluation*. Final Report, May 31, 2005, Prepared for the Centre of Excellence in Evaluation, Treasury Board Secretariat, Ottawa, <http://www.tbs-sct.gc.ca/cee/prof-eval-eng.asp>

3.2. Certification

Table 2: Characteristics of Certification

Definition	Qualifying institution	Implementation Strategies/Options	Time horizon	Pros	Cons
<p>Designation earned by a person to assure qualification to perform a job or task with the following objectives: to apply professional standards, increase the level of practice, and protect the clients. In practice, granting of a statement testifying to an individual's qualifications to perform certain duties. It is often taken to mean exam based certification. It implies that the individual is being certified as competent</p>	<p>Professional society or educational institute or IT vendor (not the government)</p>	<ul style="list-style-type: none"> • Setting up standard tests • Agreeing upon educational requirements • Establishing certification body • Managing the certification process and renewal 	<p>5-7 years</p>	<ul style="list-style-type: none"> • Less onerous than full licensing • Ensures minimum quality among practitioners • Could create more certainty for evaluators 	<ul style="list-style-type: none"> • Difficulty to agree upon requirements in terms of competencies • Complex to set up, and manage over time • Requires significant administrative capacity and financial means • Expected resistance from current practitioners who might not meet the set requirements • Legal challenges can emerge about competence evaluation

3.3. Credentialing

Table 3: Characteristics of Credentialing

Definition	Qualifying institution	Implementation Strategies/Options	Time horizon	Pros	Cons
Assurance in the form of letter or certificate given to an individual that the candidate has undertaken appropriate and sufficient educational and practical experiences	Professional association or Community of practitioners (CoP)	<ul style="list-style-type: none"> • Agree on a set of core competencies • Agree on the minimum standards of training and experience requirements in the set of established competencies • Manage issuance and renewal of letter of credentials 	3-5 years	<ul style="list-style-type: none"> • Can be easier to obtain agreement on a more flexible set of requirements, which could be adapted to the specifics of each region of the world • Less demanding in terms of administration and management than certification • Can be financially sustainable • Still carries the notion of qualification of professionals, although in a weaker sense than certification 	<ul style="list-style-type: none"> • Need to obtain and maintain commitment of volunteers of professional association or CoP to contribute to the operations of the credentialing mechanism • Need to secure minimum financing of the professional association and CoP to set up and manage the credentialing mechanism • Need to ensure coordination at global level for minimum common standards across regions • Not as strong qualification of evaluators compared to certification

3.4. Accreditation of training certification programs

Table 4: Characteristics of Accreditation

Definition	Qualifying institution	Implementation Strategies/Options	Time horizon	Pros	Cons
<p>Qualification of the training program that will then qualify the professional, i.e. a recognized professional group or institution evaluates an instructional program offered by a training institution against agreed standards. That training institution then certifies that the program graduates meet the standards.</p>	<ul style="list-style-type: none"> • The professional group (professional association or Community of practices – CoP) for the qualification of the program • The training institution (university/training institute) offering the accredited program provides a training certification for the student that passed the requirements of the program 	<ul style="list-style-type: none"> • Establish accreditation standards of training program (in particular enabling and testing the participant about the achievement of a certain level in various competencies • Examine various training programs and accreditate the ones that meet the established standards • Training institutions offer the accredited programs and check that participants have achieved the set level of competencies 	<p>2-3 years</p>	<ul style="list-style-type: none"> • Delegates the responsibility of qualifying the testing of competency skills to training institutions • Simpler to manage • More sustainable financially • Creates greater certainty for evaluators and commissioners of evaluations 	<ul style="list-style-type: none"> • Need to obtain and maintain commitment of volunteers of professional association or CoP to contribute to the operations of the program accreditation mechanism • Need to ensure coordination at global level for minimum common standards across accredited training programs

3.5. Conclusion

Licensing and certification are complex and long processes and appear to raise the specter of potential legal challenges, especially in an international context. Licensing is out of question with the perspective of the involvement of government and professional board in each participating country. Certification can be considered in the long run. It would imply an agreement on how to test specific competencies which would be hard to obtain internationally (it is already hard to agree at national level!) and would require substantial administrative capacity to administer it and/or significant financial means to sub-contract the administration to a certification agency.

Credentialing and accreditation of training certification programs appear more feasible, especially at an international scale. This solution is also quite widespread in other areas of social sciences. Both are less demanding in terms of agreement on qualification criteria and administrative capacity. Credentialing appears like a “weaker” version of certification and a logical first step that could evolve in the long run towards a certification. Accreditation of training institutions is already a common practice in many disciplines and could be relatively easily expanded to cover evaluation training programs.

4. PROPOSED BUSINESS MODEL AND PLAN OF ACTION

4.1. Proposed business model

The recommended business model is to propose to stakeholders and evaluators a menu of options combining credentialing of professionals and accreditation of training certification programs. Those options would involve a varying number of actors depending on the option: IDEAS, interested regional or national associations (EAs) and Communities of practices (CoPs), and training institutions.

A first main category of options would put one interested EA or CoP in a given region or country as the leader of the credentialing process in this part of the world, IDEAS playing a support role. The specific option would be defined by the leading EA or CoP, but would meet some general criteria set by IDEAS. If the EA so desires and has the administrative capacity (e.g. CES, JES), the credentialing process could be a certification process. Key elements of the business model for this category of options are presented in Table 5.

Table 5: Key Elements of a Business Model for Evaluators Credentialing Led by an EA or CoP

Element	Responsible institutions
1. General standards proposed for: (i) Credentialing of Commissioners of international development evaluations and Managers of international development evaluations; (ii) Accreditation of training institutions that combine both education and experience criteria	IDEAS
2. Adaptation of general credentialing standards proposed by IDEAS by to set their specific credentialing standards, but that will meet IDEAS general standards	Interested regional or national evaluation association (EA) or interested regional or national Communities of Practices (CoP) ⁴
3. Recognition by IDEAS that the specific credentialing standards of a given evaluation association or CoP meet IDEAS general standards. This would be recognized in a memorandum of understanding between IDEAS and the interested EA or CoP	IDEAS – Interested EA or CoP
4. Accreditation of Training Institutions (TIs) in terms of meeting both general IDEAS standards and their own specific standards	Interested EA or CoP
5. Training Certification in evaluation granted	Accredited Training Institution (TI)
6. Credentialing of Commissioners of international development evaluations and Managers of international development evaluations	Interested EA or CoP
7. If the EA or CoP has an established valid MoU with IDEAS, the credentialed commissioner or manager would automatically be credentialed by IDEAS	IDEAS

A second category of option would be to have IDEAS lead the credentialing process itself. This option seems attractive for regions and countries where EAs and CoPs do not exist or do not have yet the capacity to undergo the challenges implied by the first category of options. IDEAS would play a leading role in defining specific criteria for qualification and credentialing evaluators and commissioners of evaluations. The credentialing would be based on a test of knowledge and capacity for application as well as a minimum number of relevant work experiences over a certain period. Three levels of credentialing could be considered: professional – advanced – expert. Given IDEAS limited administrative capacity, the administration of the qualification process *per se* would be sub-contracted to an established reputable institution already engaged in the business of qualification and certification such as a training institute (e.g. PMI) or a private firm even if senior evaluators members of IDEAS would contribute to the grading of the application part of the test as well as assessing the relevance of experiences presented. Key elements of the business model for this second option category are presented in Table 6.

⁴ A variety of Communities of practices could be interested. Among the likely candidates, CoPs for Results-Based Management (RBM) or Management for Development Results (MfDR).

Table 6: Key Elements of a Business Model for Evaluators Credentialing Led by IDEAS

Element	Responsible institutions
1. Designing specific standards and tests for credentialing of Commissioners of international development evaluations and Managers of international development evaluations. This would involve: <ul style="list-style-type: none"> (i) developing a bank of questions for testing both categories of target groups on minimum knowledge requirements on competencies identified by IDEAS; (ii) developing and administering a bank of senior evaluators members of IDEAS who would grade the application part of the test as well as assess the relevance of experiences presented; 	IDEAS
2. Administering the credentialing process, including the test	Qualifying agency with support from senior evaluators from IDEAS
3. Credentialing of Commissioners of international development evaluations and Managers of international development evaluations	IDEAS

4.2. Advantages and requirements of the proposed business model

It builds upon the comparative advantages of each entity:

- IDEAS: good at establishing overall standards. The credentialing by IDEAS would bring international recognition. IDEAS would also act as a qualifying body for those unable to have access to the first category of options, but the administrative burden would be reasonable thanks to the sub-contracting arrangement with the qualification agency;
- Regional or national evaluation association or CoP: knowledge in terms of evaluation needs and institutions in each region or country and notoriety/credibility in the region or country. Some of those EAs and CoPs have the administrative capacity and financial means to play a leadership role as per the first category of options;
- Universities and training institutes: hold the competencies to organize and manage certification programs.

It is a flexible scheme that allows considering a diversity of evaluation approaches and regional specificities while respecting overall general standards of quality.

It would also be progressively established based on the interest of specific regional and national evaluation associations and communities of practices. Pilots can be made and the process adjusted and improved over time.

One requirement of the second option is that IDEAS has the financial and administrative capacity to play a leadership role. This implies significant membership and financial support from national and international organizations.

4.3. Desired characteristics of credentialing body and training institution

Credentialing body

- Neutral: no vested interest in qualifying evaluators: not government-controlled
- Largely representative of the evaluation stakeholders (including evaluators, commissioners of evaluations, academics, etc.)
- Competent: consider evaluation in development context
- Relevant: competencies valid overall, but adapted at regional level
- Capacity: human resources ready to contribute time for credentialing system

Training institution

- Core set of qualified trainers (with education and experience in development evaluation): not only external consultants
- Time availability of trainers to be involved certification programs, including in developing countries
- Proven track record in organizing and delivery training certifications in development evaluation

4.4. Possible qualifications to be credentialed as a professional

The required qualifications would include a combination of education and experience:

- University training (minimum Bachelor's degree);
- Minimum competencies in evaluation for evaluators or evaluation management for commissioners of evaluations as demonstrated by training in a classical academic program in evaluation or in an accredited certification program;
- Minimum professional experience in evaluation for evaluators or evaluation management for commissioners of evaluations as demonstrated by a minimum work period spend on evaluation related activities and the presentation of a few key mandates conducted in evaluation.

4.5. Maintaining credentialing system and training program accreditation

Credentialed professional

- Minimum practice (time, competencies used) over certain period as evidenced by evaluation reports and supervisor/client reference letters;
- Payment of fee by the professional to maintain credentialing over the period

Accredited training program

- Reporting on program structure and modalities (including testing of participant level of competencies), number and profile of participants, and evaluation by participants of training program over a certain period
- Payment of fee by the training institution to maintain program accreditation over the period

4.6. Challenges to be addressed

Engaging in the proposed business model requires addressing a number of challenges:

- 1) Checking for interest of stakeholders for the credentialing and accreditation system: IDEAS, regional and national EAs and CoPs, training institutions, evaluators and commissioners of evaluations and readiness for voluntary implications of its members;
- 2) Further designing the business model, including credentialing and accreditation processes, roles and responsibilities, institutional mechanisms for collaboration and coordination between IDEAS, EAs, CoPs, training institutions, standards, incentives for the scheme (both supply and demand side), compliance procedures, inspection framework, communication, etc. This should be based on a review of existing credentialing and accreditation systems and processes to develop them;
- 3) Determining the financial parameters for attractiveness and sustainability of the credentialing and accreditation system, including setting credentialing and accreditation fees;
- 4) Providing access of evaluators around the world to the credentialing system which implies accrediting a variety of training programs around the world;
- 5) Setting up Credentialed professionals and Accredited training programs databases and organizing their management, security, and update;
- 6) Checking for legal issues linked to the credentialing and accreditation system.
- 7) Adding value to the credentialing and accreditation system by generating products from those that have this quality seal.

4.7. Proposed Plan of Action to establish credentialing and accreditation system

The initial proposal was validated by IDEAS board in May 2013. Since the option of exploring credentialing and accreditation is going to be pursued by IDEAS rather than the certification option, it is therefore suggested to rename the Certification Working Group (CWG) the Qualification Working Group.

The proposed Plan of action over the next (3) years (June 2014 – May 2017) is indicated in Table 7.

Table 7: Proposed Plan of Action 2014-2017 for establishing credentialing and accreditation system

Activity	Responsible actors	Period	Output
Validate proposal with IDEAS membership to check for their interest and commitment to participate	IDEAS Board	July-August 2014	<ul style="list-style-type: none"> Validated proposal
Contact main regional and national evaluation associations and CoPs to check interest for participating in credentialing and accreditation process	IDEAS QWG members	Sept. - October 2014	<ul style="list-style-type: none"> Interested EAs and CoPs identified
Establish preliminary technical and financial proposal of business model for credentialing and accreditation system, including both categories of options	IDEAS QWG members	Sept. - October 2014	<ul style="list-style-type: none"> Preliminary document on technical and financial proposal of business model for credentialing and accreditation system
Propose choice of 2 pilot EAs and CoPs and technical and financial proposal of business model for credentialing and accreditation system to IDEAS board	IDEAS QWG leaders	November 2014	<ul style="list-style-type: none"> 2 pilot EAs and CoPs (ideally one EA and one CoP) proposed Business model for credentialing and accreditation system
Choice of 2 pilot EAs and CoPs and technical and financial proposal of business model for credentialing and accreditation system and nomination of IDEAS members responsible for designing those pilots	IDEAS Board	December 2014	<ul style="list-style-type: none"> 2 pilot EAs and CoPs selected Technical and financial business model approved IDEAS members responsible for designing those pilots nominated
Design of credentialing and accreditation system pilots for selected options	Nominated IDEAS members – Representatives of pilot EA and CoP	2015	<ul style="list-style-type: none"> 2 credentialing and accreditation system pilots designed
Validation of credentialing and accreditation system pilots designed	IDEAS Board - pilot EA and CoP Boards	October – December 2015	<ul style="list-style-type: none"> 2 credentialing and accreditation system pilots validated
Implementation of credentialing and accreditation system pilots	IDEAS – pilot EA and CoP	2016	<ul style="list-style-type: none"> 2 credentialing and accreditation system pilots implemented
Intermediary evaluation of pilots, including analysis of lessons learnt, and adjustment of business model	IDEAS – pilot EA and CoP	Early 2017	<ul style="list-style-type: none"> Intermediary evaluation of pilots conducted
Expansion of business model to other interested EAs and CoPs	IDEAS – other interested EAs and CoPs	2017 and on	<ul style="list-style-type: none"> Credentialing and accreditation systems designed and implemented with other EAs and CoPs