



**Canadian Evaluation Society
Credentialed Evaluator Designation Program**

**EVALUATION REPORT:
EXECUTIVE SUMMARY**

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Introduction

After several decades of debate about professionalization within the evaluation community, the Canadian Evaluation Society (CES) officially launched the Credentialed Evaluator (CE) professional designation in June 2009 with the goal of promoting ethical, high quality, and competent evaluation in Canada. Through the Professional Designation Program (PDP), which was founded on the three pillars of standards, competencies, and a code of ethics, CES intends to contribute to the professionalization of evaluation and to bring clarity to key evaluation concepts and definitions, while also enhancing the reputation of the field among CES members and prospective clients (Love, 2015). Specifically, the PDP aims to increase identification of practitioners as professional evaluators and the recognition of evaluation as a distinct profession, enhance the evaluation knowledge, skills, and professional development of applicants as well as the alignment between the CES competencies for Canadian evaluation practice and educational curricula, and increase the value of and demand for the CE designation.

Since the establishment of the CE designation in 2009, CES has iteratively discussed the potential strengths and drawbacks of the program while also inquiring about areas for future growth. In June 2015, CES commissioned the Claremont Evaluation Center at Claremont Graduate University to design and implement a formative evaluation to help them improve the design, resourcing, uptake, and outcomes of the PDP. In collaboration with an evaluation steering committee created by the vice president of CES, the evaluation team developed several evaluation questions related to the evaluation principles of effectiveness, relevance/utility, efficiency, unintended impacts, and sustainability.

Methods

The evaluation team collected data from a wide variety of stakeholder groups to respond to the evaluation questions. Two online surveys were created and disseminated to obtain input from evaluators who were current members of CES ($N = 1,576$ invited, $N=706$ responded) and from evaluators whose membership with CES had lapsed or who had never been CES members ($N=1,800$ invited, $N=336$ responded; lapsed only). In addition, 83 invitations were disseminated to CES leadership, the CES Board of Directors, CES Credentialing Board (CB) members, commissioners of evaluation in Canada, employers of evaluators in Canada, potential/prospective partners for CES (with respect to the CE designation), and individuals who had spoken out critically in the past regarding the credential. In addition, our team reviewed secondary data sources where available. We obtained a high response rate from CES members (45%) as well as from interviewees (78%). A relatively low response rate was achieved with non-CES members (19%).

Results

Effectiveness: Achievement of near-term intended outcomes. Although the CE designation has been underway for only a relatively brief time period, it is clear that progress is being made towards several short- to mid-term intended outcomes examined in this evaluation, including the level of awareness of the CE designation among key target audiences, the recognition of evaluation as a profession and expected evaluator competencies among key target audiences, the alignment between educational curricula and the CES competencies, and the extent to which CEs identify as professional evaluators. Despite these achievements, several opportunities for

improvement exist. Greater attention is needed on activities aimed at increasing the extent to which non-evaluator audiences (specifically commissioners and employers of evaluation) are aware of and value the designation and the related competencies. Additionally, preliminary indications from this evaluation suggest further efforts are warranted to better understand the alignment between courses offered specifically for professional development in evaluation (particularly for federal public servants) and the CES competencies.

Effectiveness: Barriers and facilitators to realizing intended outcomes. The perceived relevance/utility of the CE designation is mixed for evaluators and those who request their services. Evaluators did see some potential benefit to acquiring the CE designation with respect to marketing or more generally to their careers. However, the current lack of acceptance or support of the CE designation in their workplaces presented barriers to applying. Evaluators who may be eligible for the CE designation but have not applied also saw the costs and time associated with the application process, as well as questions about how they would likely benefit from expending these resources, as deterrents. Employers and commissioners of evaluation typically viewed the CE as a “nice to have” item and considered many factors in addition to the CE when making decisions. In some cases, particularly within the federal government, there are already policies and procedures in place that the individuals with whom we spoke perceived as obstacles to making the CE a requirement for hiring, selecting contractors, or supporting the pursuit of the CE among current employees. The desire to support the designation as a means to move the field towards professionalization and promote greater recognition of evaluation has been a strong motivating force for evaluators to apply for the CE as well as for organizations to find means to integrate recognition of the CE in their current operations.

Efficiency. The application process was viewed as efficient from the perspective of two key stakeholder audiences—applicants and CB members. Applicants who submitted through the fast-track process were much more likely to view the level of effort involved as acceptable than were those who applied through the regular mechanism. CB members, however, varied in their opinions regarding the fast-track process. Although the application process was viewed as efficient overall, there remain opportunities for improvement. For example, the CES board could consider: (a) streamlining the competencies portion of the application; (b) providing more information, such as upcoming submission deadlines and feedback on application status; (c) providing more examples for applicants; (d) making professional development easier to access; (e) offering additional face-to-face meetings and more rigorous training sessions for CB members; and (f) improving the transparency of application review procedures.

Unintended impacts. Stakeholders had mixed responses regarding the occurrence of several potential positive and negative unintended impacts that we specifically inquired about. Less than half of the evaluator respondents who had received the CE designation felt it improved their marketability or helped them achieve some career goals. Approximately half of the CEs viewed the application process itself as a means for learning how to improve their work and felt that the value they obtained from acquiring the designation was worth the resources they expended. The majority of participants in this evaluation did not report observing any negative effects of the CE designation to date.

Sustainability and growth of the CE designation. The sustainability of the CE designation is dependent upon a number of factors including retaining the designation among evaluators who

have already received it, attracting more evaluators to apply for the designation, ensuring that the CB can maintain current levels of effort or higher, and ensuring sufficient revenue to support anticipated expenses associated with the designation. Individuals who have been through the maintenance process find it to be reasonable, but many new CEs need clarification about the process required to maintain the designation. Major areas of concern relating to the sustainability of the CE designation relate to the ability to attract applicants as well the extent to which it can be financially supported in the future given its current demand. Several opportunities exist for sustaining or growing the designation, including increasing CES membership; building or expanding partnerships with government, educators/universities, and international organizations; and engaging more actively in marketing efforts.

Conclusions and Recommendations

Overall, the evaluation findings suggest that the PDP is making strides in achieving several of the near-term intended outcomes. However, these achievements sit against a backdrop that indicates continued progress may be at risk. Throughout the report we point to several areas where improvements can be made, and we hope that a thorough review of this document will help CES to improve several processes. Following are some specific recommendations about the most pressing issues that need attention to facilitate the success and sustainability of the current program.

Recommendation #1: Consider tailoring the existing offering to increase its value among consumers of evaluation services.

One question that may be helpful in addressing this recommendation is “What do *these* stakeholders need from evaluators within *this* context, and how might we work with them to tailor the PDP efforts to address these needs?” Currently, the CES competencies and the CE designation itself are broad and generic. In many ways this is a strength of the current work. In being so broad, however, it seems that the designation loses appeal for some. Interviewees often suggested that that tiers or specializations could enhance the value of the CE designation. For example, this may include creating tiers that indicate the level of expertise (e.g., beginner, intermediate, advanced, expert), differentiating between those who manage versus implement evaluations, and offering specializations based upon type of evaluation approach.

When interviewees commented on the general fit between CES competencies and their organizations’ needs, we typically heard that the competencies were so broad that they were fine. Others noted, however, that there were particular things about their context that were not captured well in the current competency set. For example, in the federal context there was a suggestion that the competencies seemed more tailored to external rather than internal evaluators. Such suggestions are *specific to the context* within which evaluation occurs. If CES was able to work closely with a few key partners in tailoring the current offering perhaps these stakeholders would find more value in the product.

Recommendation #2: Improve the transparency and accountability of the current process.

Stakeholders raised questions throughout this evaluation about the quality of the process used to determine who receives the CE designation. Such questions emerged among stakeholders external to the review process as well as within CB membership. For example, slightly less than half ($n = 80$, 44%) of current and former CE designation applicants believed that the CB

implements a high-quality review process and almost an equivalent number ($n = 78$, 43%) reported that they did not know if a high-quality review was implemented by the CB. CB members were hesitant to state that they conducted a high-quality review process, often because they lacked the information to state this with certainty. We did not examine the level of quality in the review process as part of this evaluation; however, our findings suggest that there could be benefits to doing so in the future. Regularly gathering and sharing information about the quality of the review process is important for increasing the current level of transparency in the process, for identifying areas for improvement, and for being accountable to the evaluation community. Such efforts can help the CB to better understand where improvements can be made and allow external parties to formulate an accurate understanding of the extent to which they can trust this credential.

Recommendation #3: Create a clear value proposition for consumers and evaluators.

The findings from our evaluation suggest that a major barrier to increasing the uptake of the CE designation among evaluators relates to a relatively limited demand for it among consumers of evaluation services. In addition, consumers of evaluation services with whom we spoke indicated that they were somewhat hesitant to *require* the CE as part of their processes for hiring evaluators or selecting evaluation contractors given the relatively small pool of CEs at this time. Such dynamics have the potential to create a vicious cycle. One potential way to help disrupt this dynamic is to create a very clear value proposition for both consumers and evaluators.

Evaluators often indicated that their lack of clarity about how the CE would benefit them prevented them from applying. Such questions can be answered empirically, thus, we encourage CES to design mechanisms for obtaining ongoing, systematic data about the experiences of those who receive the CE designation or to follow up in the near future with efforts to systematically evaluate its added value for evaluators. Such efforts may increase the level of interest in applying for the CE by providing tangible evidence to prospective applicants when benefits of the CE designation have outweighed the costs, when it has enhanced employment opportunities, and when it has been helpful to new evaluators.

Consumers may also increase their interest in and level of commitment to the CE designation if a clear value proposition is developed and shared. We were able to speak with a small group of employers and commissioners as part of our evaluation, and this provided an initial snapshot of their viewpoints. Future evaluations could focus on garnering insights from a much broader group of employers and commissioners in order to systematically document their experiences working with CEs. Should findings from such an investigation produce positive results, this could be used to create a value proposition tailored to consumers of evaluation and may increase their level of commitment to, interest in, and demand for the CE designation.

The CES is to be commended for taking the first step towards professionalizing evaluation—particularly given that these efforts have largely been taken with volunteer time—and soliciting an evaluation to provide formative insights. This has clearly been, and continues to be, a controversial topic in the international evaluation community. Irrespective of the position one holds regarding the professionalization of the field or how it should be approached, the lessons learned from CES's efforts should be useful to our field.