

**Canadian Evaluation Society  
Credentialed Evaluator Designation Program**

**EVALUATION REPORT**

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## 1.0. Executive Summary

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.

## 2.0. 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 CES 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 the 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.

In order to qualify for the CE designation, evaluators must submit an online application that demonstrates evidence of (a) a graduate level degree, (b) 2 years of full-time equivalent evaluation-related work experiences within the last 10 years, and (c) experience and/or education relating to at least 70% of the competencies in each of the five CES Competencies for Canadian Evaluation Practice domains (CES, 2015). Evaluators applying for the CE designation have 3 years to complete the application. Each completed application is reviewed by two members of the Credentialing Board (CB), comprising senior evaluators, who then recommend that the application either be accepted or rejected (Barrington, Frank, Gauthier, & Hicks, 2015). In the event that the two reviewers are not able to agree, the application is sent to a third reviewer. To maintain their designation, CEs must complete at least 40 hours of professional development every 3 years. As of the 2014–2015 annual report of CES, 287 CE designations had been awarded, which represents approximately 18% of the organization's 1,569 members.

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 a formative evaluation to help them improve the design as well as resourcing, uptake, and outcomes of the PDP. Following a formal request for proposal (RFP) process, the Claremont Evaluation Center at Claremont Graduate University was awarded funds to design and implement this evaluation.

In this report, we provide an overview of the general steps we took to develop the evaluation, describe the methodology we employed, and present the evaluation findings and potential implications. The primary intended stakeholders for this evaluation and the current report are the members of the CES Board of Directors. We have organized the presentation of the key findings in a manner that we believe will be most relevant to and actionable by the board. We recognize that the findings will also be of interest to a wide array of stakeholders in the evaluation community, including but not limited to the CES membership, Canadian evaluators who are not currently members of CES, commissioners and employers of evaluators in Canada, and evaluation professional associations across the globe.



### 3.0. Methodology

Given the breadth and depth of the PDP efforts and anticipated outcomes, there were several potential focal points available for this evaluation. In determining how to focus the evaluative inquiry we took efforts to understand what information would be most useful to the CES board members in making decisions about how to improve the PDP in future years, which stakeholders were important and perhaps even critical to reach and effect change in if the near and longer term outcomes of the PDP are to be realized, and how to structure the evaluation so it was feasible to implement within a short timeframe while also producing findings that would be considered credible by the evaluation stakeholders.

Our team structured the evaluation as two phases: evaluation planning and evaluation implementation. The planning phase commenced in early June 2015 and concluded with the finalization of data collection instruments in August 2015. Key activities of the planning phase included engaging a steering committee to assist with all aspects of the evaluation plan, including drafting a logic model of the CE process and intended outcomes, generating and refining key evaluation questions, and reviewing and providing extensive feedback on data collection instruments. Data collection efforts were developed with the intention of accomplishing the following aims:

1. Gain insights from audiences that had not been approached in previous evaluation efforts but who play an important role in the success of the PDP;
2. Measure the perceptions of several audiences to develop a comprehensive picture of how the PDP is performing with respect to the five evaluation principles; and
3. Leverage patterns from existing data to target subgroups of evaluators to delve deeper into potential issue areas that may pose a risk to, or present opportunities for improving, program performance.

Evaluation implementation efforts commenced immediately after the planning phase and included soliciting nominations for interviewees and recruiting participants, as well as collecting, analyzing, and synthesizing data.

#### 3.1. Evaluation Purpose and Questions

The purpose of this formative evaluation was to provide CES with information that could be used to improve the design, resourcing, uptake, and outcomes of the PDP. In alignment with this purpose, our team was asked to address five evaluation principles: effectiveness, relevance/utility, efficiency, unintended impacts, and sustainability. We developed and vetted key evaluation questions with the steering committee to align them with these principles and guide our inquiry (see Table 1). Evaluation questions were slightly modified when appropriate (e.g., we restricted the efficiency question to those most knowledgeable about the process—applicants and CB members).<sup>1</sup>

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<sup>1</sup> Please note that the questions as originally worded are included in this table, but are presented as revised within the results section.

**Table 1. Key Evaluation Questions Listed by Corresponding Principle**

<b>Principle</b>	<b>Evaluation Question</b>
<b>Effectiveness</b>	<ul style="list-style-type: none"><li>• To what extent are there indications that the early and intended outcomes of the PDP are being realized within each stakeholder group?<ul style="list-style-type: none"><li>○ What factors present barriers to (or act as facilitators in) realizing these outcomes (e.g., factors specific to PDP activities such as fast-track vs. regular; factors specific to individuals such as working part-time or full-time as an evaluator)?</li><li>○ Which assumptions are not being met, or are at risk of not being met?</li></ul></li></ul>
<b>Relevance/Utility</b>	<ul style="list-style-type: none"><li>• To what extent is the CE designation currently relevant/useful for Canadian evaluators, evaluation commissioners, employers of evaluators, and external partners?<ul style="list-style-type: none"><li>○ What differences, if any, exist in the relevance/utility of the CE designation among the individuals who make up these groups? What factors contribute to the differences observed?</li></ul></li><li>• To what extent is the current Canadian evaluation context conducive to the CE designation?</li></ul>
<b>Efficiency</b>	<ul style="list-style-type: none"><li>• What aspects of the CE application and review process are or are not operating efficiently for evaluators who have applied for the CE designation, the CB, the CES vice president, the application assistant, the executive director, and the CES board?<ul style="list-style-type: none"><li>○ In what ways, if any, does efficiency vary by the type of CE application process used (e.g., regular or fast-track)?</li></ul></li></ul>
<b>Unintended Impacts</b>	<ul style="list-style-type: none"><li>• What, if any, positive or negative unintended consequences of the PDP have members of the stakeholder groups experienced or perceived?<ul style="list-style-type: none"><li>○ To what extent and how do aspects of the PDP activities contribute to these consequences?</li></ul></li></ul>
<b>Sustainability</b>	<ul style="list-style-type: none"><li>• What features or aspects of the current program require additional attention to increase the likelihood that the PDP will be sustained and grow in the future, based upon the experiences and perceptions of each stakeholder group?</li><li>• How financially viable/sustainable is this program?</li></ul>

### **3.2. Data Collection and Analysis**

The evaluation team collected data through online surveys and semi-structured telephone interviews from several stakeholder groups: (a) evaluators; (b) CES leadership and staff; (c) potential/prospective partners; (d) vocal critics; (e) evaluation commissioners; and (f) employers of evaluators. Evaluators received one of two online surveys depending upon whether they were current CES members or individuals who had never been CES members or whose CES memberships had lapsed in the past two years (For brevity's sake, the latter group is typically referred to collectively in this report as "non-members."). Representatives of all other stakeholder groups were asked to participate in telephone interviews.

In addition to gathering primary data through online surveys and interviews, the evaluation team also requested several sources of secondary data from CES such as financial statements and the PDP CB terms of reference and guidelines. We viewed these as important sources of information when responding to the sustainability question related to financial viability/sustainability and as a potential means for checking or corroborating insights garnered from the primary data.

Table 2 provides a brief summary of how the data collection efforts align with the five evaluation principles CES asked us to examine. Appendix A includes additional details about our evaluation planning and implementation.

**Table 2. Data Collection Strategies by Evaluation Principle**

	Relevance/ Utility	Efficiency	Effectiveness	Unintended Impacts	Sustainability
<b>Online Surveys</b>					
Evaluators					
CES Members	X	X	X	X	X
Lapsed/Non-members	X		X	X	X
<b>Semi-structured Interviews</b>					
CES Leadership		X	X	X	X
Commissioners	X		X	X	X
Employers	X		X	X	X
Potential/Prospective Partners	X		X	X	X
Vocal Critics	X		X	X	X
<b>Secondary Data</b>	X	X	X	X	X

### 3.3. Participant Characteristics

Of the 1,576 CES members and 1,800 lapsed members the evaluation team invited to complete an online survey, approximately 45% and 19% consented, respectively (Table 3). Evaluation participants were given the option of completing the survey in either English or French. The majority of participants completed the survey in English (CES Members:  $n = 639$ , 91%; Lapsed/Non-members:  $n = 322$ , 89%).

**Table 3. Survey Response Rates**

	Invited	Responded <sup>a</sup>	Response Rate
CES Members	1,576	706	45%
Lapsed Members	1,800	336	19%
Non-Members	Unknown <sup>b</sup>	28	NA

<sup>a</sup> Includes individuals who provided consent to participate in survey, including those who responded but were removed from the survey due to selection criteria of membership (i.e., CES member or non-member).

<sup>b</sup> Non-members received the survey link through postings or circulation through CES chapters/CES chapter partners. As a result, we are unsure of the number invited and cannot calculate a response rate for this respondent group.

Survey respondents came from a wide range of locations across Canada and represented all employment sectors. CES members and lapsed/non-members most frequently indicated that they worked or studied in Ottawa-Gatineau (CES Members:  $n = 160$ , 25%; Lapsed/Non-members:  $n = 82$ , 31%) or Ontario (CES Members:  $n = 124$ , 20%; Lapsed/Non-members:  $n = 69$ , 26%). CES members most frequently reported employment in the private sector/consultant sector ( $n = 155$ , 25%), followed by the not-for-profit sector ( $n = 98$ , 16%). The lapsed and non-member survey respondents most frequently reported working within the federal public sector ( $n = 74$ ,

28%), followed by the educational sector ( $n = 51$ , 19%). Additional details regarding the demographic characteristics of survey respondents are provided in Appendix B.

We invited 83 individuals to participate in telephone interviews. All interviews were performed in English. Sixty-five of these invitees (78%) participated, including the CES president, vice president, and executive director (Table 4). Interviewees represented a wide range of stakeholders:

- **Credentialing Board members.** CB members represented a range of local CES chapters with the largest portion from the national chapter, Ottawa-Gatineau ( $n = 5$ , 22%), followed by Ontario ( $n = 4$ , 17%), and Société Québécoise d'Évaluation de Programme ( $n = 3$ , 13%). The majority of interviewees had been on the CB since its inception ( $n = 15$ , 65%). Two individuals had never reviewed an application and one only reviewed an application during the mentoring process (i.e., not independently).
- **Employers and commissioners.** The evaluation team received 46 specific nominations for commissioners and 47 specific nominations for employers (see Appendix C for list of nominees). In several instances, the nominations were for institutions recognized as both commissioners and employers. The sample of commissioners included a mix of entities from the federal and provincial governments. The sample of employers included private consulting firms as well as nonprofit entities and regional offices of the federal government.
- **Potential/prospective partners.** The majority of organizations represented in this category provide academic education or professional development services to evaluators. Policymakers who have a stake in the quality of Canadian evaluations were also included.
- **Vocal critics.** Vocal critics represented a range of perspectives and included individuals who still had concerns about the CE designation, as well as those who had voiced concerns about the designation but either still became CEs or shifted their opinions over time. These individuals worked in a variety of settings and in multiple capacities.

**Table 4. Interviews Requested and Performed**

	Invited	Conducted	Declined <sup>a</sup>	No Response
CES Leadership				
CES Board Members	13	13	0	0
CB Members	29	23	0	6
CES Leadership/Staff	3	3	0	0
Commissioners/Employers	7	5	0	2
Commissioners	8	4	0	4
Employers	6	5	0	1
Potential/Prospective Partners	11	8	1	2
Vocal Critics	6	4	1	1
Total	83	65	2	16

<sup>a</sup> Of the two potential interviewees who declined, one was away and unable to find time to participate; the other did not offer a reason.

### 3.4. Strengths and Limitations

This evaluation examined the first large-scale, national initiative to develop a credentialed evaluator designation program. Important strengths of this evaluation include high levels of participation across stakeholder groups and formal feedback from several stakeholders of the CE designation (e.g., employers, commissioners, potential/prospective partners, lapsed/non-CES members) since inception.

As with any evaluation, there are some key limitations that should be kept in mind when reading the results section of this report:

- **Limited participation from some specific groups.** We experienced low participation from non-CES members as well as provincial government employer/commissioners. Additionally, we were unable to obtain the perspective of the application assistant since he/she was on extended leave and the individual taking his/her place had not yet engaged in application efforts.
- **No formal pilot test of the surveys.** We were unable to formally pilot the surveys due to time constraints. The evaluation team did perform internal testing and reviewed the survey content with the PDP Evaluation Steering Committee; however, several errors were only detected when a broader group of individuals completed the surveys. In some instances, respondents had difficulty interpreting the questions, which may have resulted in a larger proportion of “N/A” or “Don’t Know” responses than would not have occurred if we had conducted a formal pilot test.
- **Limited range of stakeholders engaged in planning phase.** The RFP for this evaluation requested a participatory evaluation. With our consultation, the vice president of CES established a PDP Evaluation Steering Committee to solicit involvement from a small group of diverse individuals (e.g., from academia and provincial government, as well as private consultants). Over the course of the evaluation, it became clear that engaging with additional stakeholder groups may have been helpful. For example, engaging individuals who had previously raised concerns about the CE could have raised different questions during the design stage, or have enabled us to examine these questions from different perspectives.
- **Availability of secondary data for corroboration.** In some cases secondary data requested by our team was unavailable—for example, data regarding performance on service standards. It is unclear whether our requests had a turnaround time that was not feasible to fulfill, if these data were not regularly captured, or if there were broader issues relating to data quality or extracting data from existing systems. Regardless, not having access to such data limited our ability to corroborate across data streams or enhance the comprehensiveness of some findings.

### 4.0. Results

In this section we present the evaluation findings. At the beginning of each section we identify the question(s) addressed and provide a summary table that includes a brief narrative response to the question(s).<sup>2</sup> As part of the summary table we highlight aspects of the program that, based

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<sup>2</sup> Given that data pertaining to the following evaluation question reside in various results sections, we summarize these findings in Appendix E: Which assumptions are not being met, or are at risk of not being met?

upon our findings, need attention in order to improve current procedures or future outcomes. As described in Table 5, we elected to use a three-point rating system to highlight these areas. It is important to note that the ratings we provide are based upon our interpretation of the findings; no benchmarks were set in advance by CES or with the PDP Evaluation Steering Committee. As a result, others may have reasonably arrived at different ratings. We provide a brief statement at the end of each section to note our rationale for our ratings.

**Table 5. Description of Rating System**

Rating	Description of Rating
+	Area of strength—Potential area to leverage for programmatic success.
+/-	Area with opportunity for improvement—Limited action is needed to support programmatic improvement.
-	Area of weakness—Taking action on this item is important for programmatic improvement.

We have typically organized the results by evaluation principle; however, we have elected to present the effectiveness and relevance/utility data differently. The extent to which evaluators or those who seek services from evaluators (e.g., employers, commissioners) view the CE designation as relevant or useful to their work could affect whether the intended outcomes of the designation are realized. Therefore, we present the findings for the principle of effectiveness in two sections: Section 4.1 addresses findings that indicate the extent to which early intended outcomes of the program are being realized, and Section 4.2 presents several factors that could be barriers or facilitators to realizing the intended outcomes of the designation, including its relevance/utility among key audiences.

#### **4.1. Effectiveness—Outcomes**

Although the CE designation is still in the early phases of implementation, one of the primary questions of interest to stakeholders is the extent to which early, intended outcomes of the designation are occurring. Thus, we gathered data to provide insights about the following intended outcomes, which are depicted in the draft logic model presented in Appendix D:

##### **Evaluation Question**

To what extent are there indications that the early and intended outcomes of the PDP are being realized within each stakeholder group?

- Awareness of the CE designation
- Awareness of the CES competencies
- Recognition of evaluation as a profession
- Valuing of the designation
- Demand for the designation
- Alignment between educational curricula and competencies
- Identification as a professional evaluator

In the sections that follow, we describe the extent to which each of these outcomes has been realized to date based upon our available evidence.

## SUMMARY

Although the CE designation has been underway for only a few years, it is clear that progress is being made towards several short- to mid-term intended outcomes examined in this evaluation. Nevertheless, 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. All interviewees from universities who were providing formal training on evaluation considered the CES competencies in some manner within their curricula. 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.

Topic	Rating
4.1.1. Awareness of the CE designation	+/-
4.1.2. Recognition of evaluation as a profession and expected evaluator competencies	+/-
4.1.3. Valuing of the CE designation	-
4.1.4. Employer and commissioner demand for the CE designation	□
4.1.5. Alignment between educational curricula and competencies	+/-
4.1.6. Identification as a professional evaluator	+/-

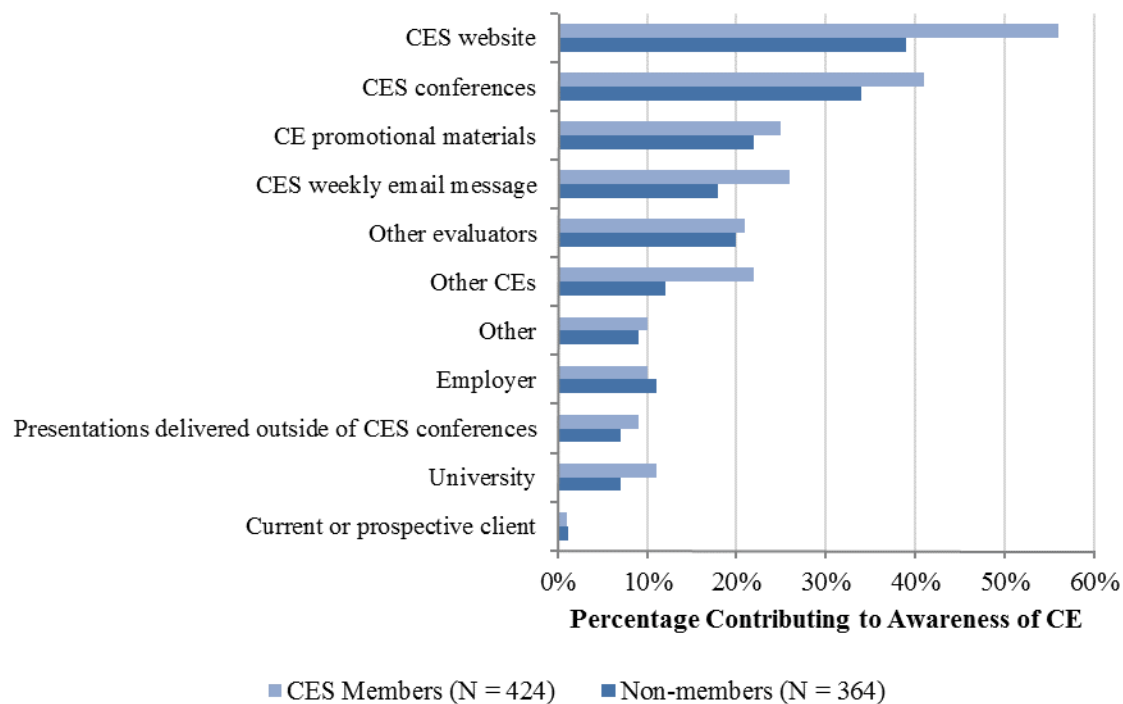
### ***4.1.1. Awareness of the CE Designation***

The PDP intends to increase awareness of the CE designation among several target audiences including evaluators, employers of evaluators, commissioners of evaluation, and potential partners. As part of this evaluation we gathered specific data to examine the extent to which evaluators and employers were aware of the designation. To a lesser degree, we attempted to garner insights about the extent to which commissioners of evaluation and potential/prospective partners of CES are familiar with it.

**Awareness among evaluators.** Analyses of the CES member and non-member survey data indicate a very high level of awareness of the CE designation among evaluators. Almost all CES members who responded to the survey and reported that they had not applied for the CE were aware of the designation ( $n = 397$ , 94%). Similarly, almost all respondents to the non-member survey were aware of the designation ( $n = 284$ , 95%).<sup>3</sup> Evaluators, whether members of CES or not, most commonly reported hearing about the credential through the CES website (CES Members:  $n = 236$ , 56%; Non-members:  $n = 142$ , 39%) or CES conferences (Figure 1).

<sup>3</sup> Six percent ( $n = 34$ ) of non-CES members who originally reported not being aware of the CE designation were shown a short description of the designation and then asked if they remembered hearing about the designation previously. Of those individuals, 52% ( $n = 17$ ) reported that they had in fact heard of the CE designation prior to participating in the survey, bringing the total of non-CES members aware of the CE to 95% ( $n = 284$ ).

**Figure 1. Factors Contributing to Non-Applicant Awareness of the CE Designation**

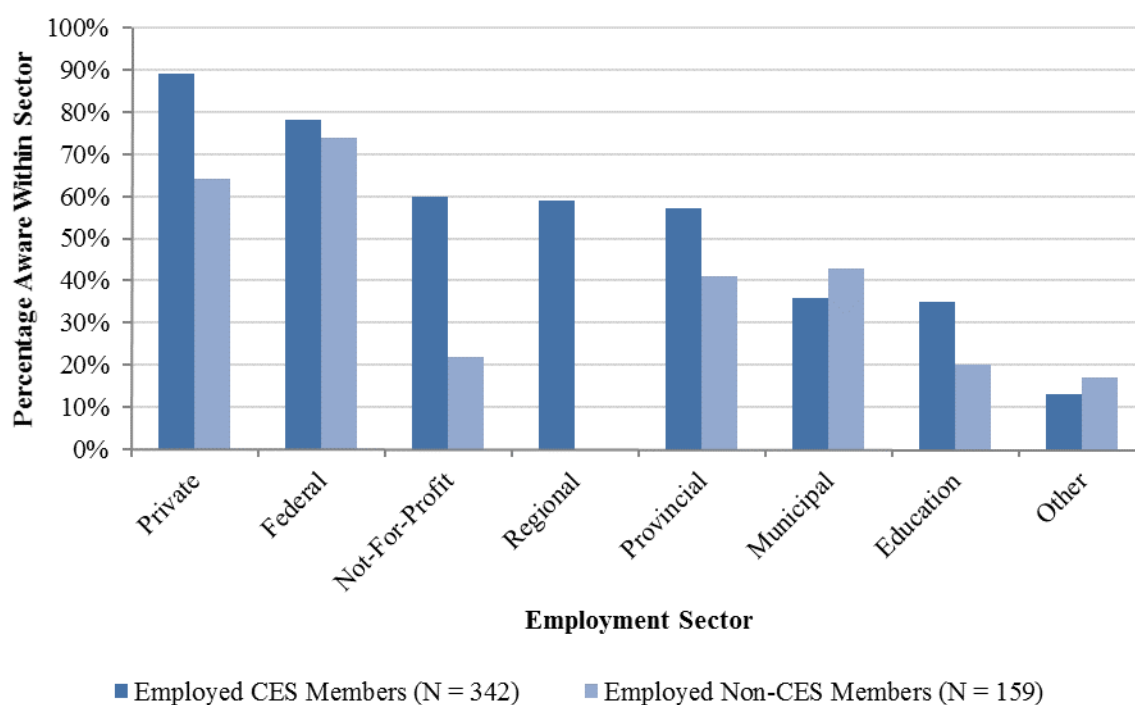


**Awareness among employers.** In general, the level of awareness of the CE designation was strong among employers we interviewed. This is not surprising, however, given that these individuals voluntarily agreed to interviews on the subject. All of the interviewees reported becoming aware of the CE designation through promotional activities initiated by CES or one of the regional chapters. Commonly cited sources included the CES annual conference and chapter information sessions, as well as marketing and promotional materials. In addition to CES, some respondents indicated they learned of the designation through discussions with CEs.

To obtain a broader and perhaps more accurate perspective on the extent to which employers of evaluators may be aware of the designation, we asked evaluators to report on their employers' awareness. Roughly 60% ( $n = 260$ ) of respondents to the CES member survey who were employed by an entity indicated that they believed their employers were aware of the designation. Fewer non-members who reported being employed believed their employers were aware of the designation ( $n = 109$ , 47%) (Figure 2). The reported awareness of the CE designation among employers varied by the sector of employment. A larger percentage of evaluators, whether CES members or non-members, who were employed in the private sector or federal government indicated that they believed their employers were aware of the designation in comparison to evaluators employed in other sectors (Figure 2).



**Figure 2. Perceived Employer Awareness of CE Designation by Employment Sector**



**Awareness among commissioners and potential/prospective partners.** All prospective partners whom we interviewed were aware of the CE designation, with several having pursued and/or received their CE designations. Commissioners were also aware of the designation.

**Rating:** *Area with opportunity for improvement.*

**Rationale for rating:** Awareness of the CE is very high among evaluators, whether they were CES members or non-members. However, proxy reports from evaluators indicate there is opportunity for increased awareness among key target audiences including employers. We did not acquire sufficient data through this evaluation to know whether another key audience—evaluation commissioners—were well aware of the designation.

#### ***4.1.2. Recognition of Evaluation as a Profession and Expected Evaluator Competencies***

In addition to being aware of the CE designation, the PDP aims to increase recognition of evaluation as a profession among those who use evaluation services (i.e., employers and commissioners), as well as among other stakeholder groups that may influence the conduct of evaluation (e.g., potential/prospective partners). Part of recognizing evaluation as a profession is being aware that there is a unique set of competencies for evaluators. We assessed these outcomes primarily by asking evaluators to report on behalf of their employers, but we also gathered data directly from some employers, commissioners, and potential/prospective partners via interviews.

**Expected competencies.** Less than half of evaluators responding to the survey who were employed by an entity noted that their employers were aware of the CES competencies (CES Members:  $n = 172$ , 40%; Non-members:  $n = 82$ , 36%). A larger percentage of CES members employed in the private sector ( $n = 40$ , 77%) and federal government ( $n = 42$ , 58%) believed

that their employers were aware of the CES competencies compared to those working in other sectors. Additionally, a large percentage of CES members working in the education sector did not believe that their employers were aware of the competencies ( $n = 43$ , 61%). The largest percentage of non-members who believed their employers were aware of the CES competencies worked in the municipal public sector ( $n = 16$ , 100%).

Among individuals interviewed, most employers, commissioners, and potential/prospective partners were aware of the CES competencies. Potential/prospective partners were not only aware of them, but also noted that they align well with the work being done within their organizations, the majority of which were academic institutions.

**Evaluation as a profession.** The majority of respondents to the CES member survey ( $n = 293$ ; 67%) and non-member survey ( $n = 129$ , 56%) noted that their employers recognized evaluation as a distinct profession. Several stakeholder groups (i.e., CES board members, potential/prospective partners, vocal critics, and employers/commissioners) shared their perceptions of the recognition of evaluation as a profession in Canada. Overall, interviewees reported that they believe professionalization of evaluation in Canada is a worthy cause to pursue.

We specifically asked CES board members if they believed that the recognition of evaluation as a profession in Canada was increasing, decreasing, or remaining the same. While no one reported a decrease in recognition, the board members were split on whether it was increasing or remaining the same. Many said the recognition of evaluation has been increasing since the inception of the CE designation and cited the mention of it in RFPs and job applications as an asset, as well as increased self-identification as an evaluator as evidence. Although these individuals noted an increase, they also suggested that recognition of the CE was still limited and not where they would like to see it. Other CES board members believed that the level to which evaluation is recognized as a profession in Canada has remained the same.

*~“There is a greater level of professionalization and recognition and professionalization. However, [I] do think that we are fighting an uphill battle.”*

*~“[The CE has helped to] define us [as]different [from] social research or academic or other related professional designations—market research or management consulting.”*

*~“Is it increasing the professionalization? No, I don’t think so....I don’t think it’s decreasing, but I think it’s remaining about the same.”*

**Rating:** Area with opportunity for improvement.

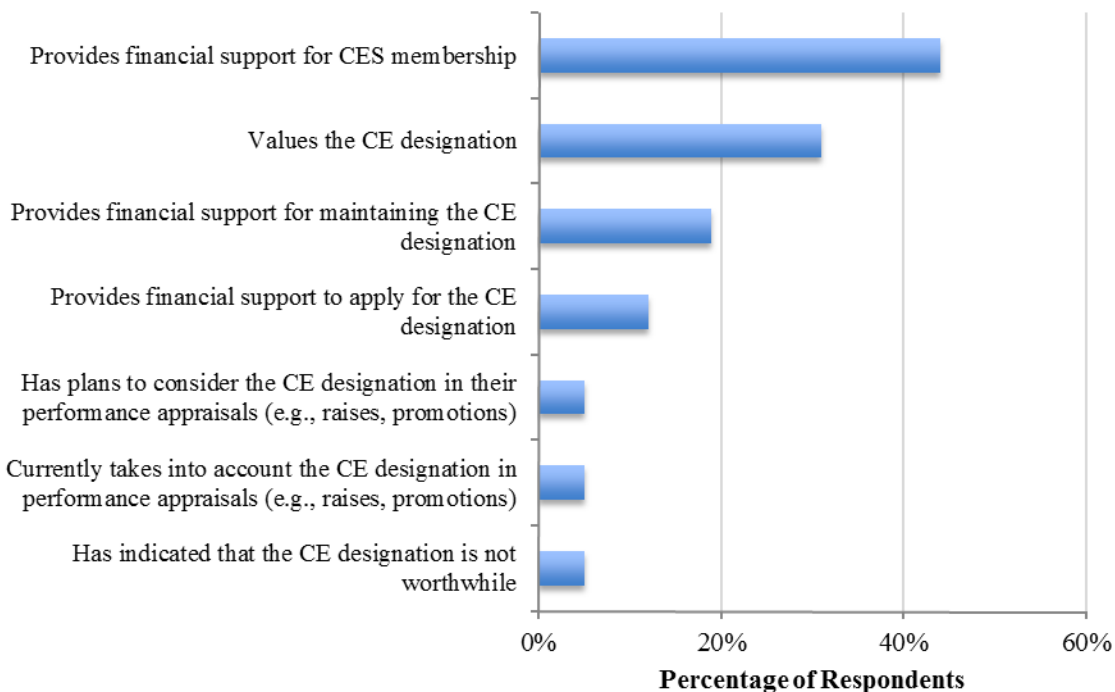
**Rationale for rating:** Proxy reports from evaluators of their employers’ awareness of the CES competencies and recognition of evaluation as a distinct profession did not exceed 70% overall; for the CES competencies this was always less than 50%. The presence of some recognition is positive; however, these survey findings—coupled with mixed reports from other stakeholders regarding the recognition of evaluation as a profession increasing, remaining the same, or decreasing—indicates continued room for improvement.

#### 4.1.3. Valuing of the CE Designation

Awareness of the CE designation and recognition of evaluation as a profession will not necessarily lead to action among intended target audiences—for example, evaluators may not decide to apply for the CE or employers may not change their hiring practices to acknowledge the designation. Based on the draft logic model (Appendix D), an important factor in realizing action is the extent to which stakeholders value the CE designation.

In general, respondents to the CES member and non-member surveys who had not applied for the CE designation noted they were unsure whether their employers valued it (CES Members:  $n = 166$ , 38%; Non-members:  $n = 106$ , 46%). More specific questions regarding employer behaviors that indicate they value the CE designation or membership in CES provided more valuable information. Of the types of support that employers may offer their employees, evaluators (CES members and non-members alike) most frequently noted that their employers provided financial support for CES membership ( $n = 300$ , 44%). Fewer than 20% of evaluators responding to the surveys indicated that their employers provided other types of support for pursuing the CE (Figure 3).

**Figure 3. Types of Employer-Provided Support for CES Membership and CE Designation (CES Members and Non-Members Combined;  $N = 676$ )**



The majority of interviewees from every stakeholder group (i.e., employers, commissioners, potential/prospective partners, and vocal critics) agreed that the professionalization of the field was an important cause to pursue. Several individuals noted that the recognition of evaluation as a profession would be especially helpful in maintaining the reputation of evaluators. With one exception, interviewees representing employers and commissioners reported that professionalization supports the work of their organization. In particular, professionalization is considered important to building an identity among evaluators as well as to, “*increase credibility*

with clients,” and “elevate the role of evaluators within government.” Others indicated that professionalization could improve evaluation practice.

*~“It is important that people have a professional level of competence. ....In academia, we use peer review as a check and balance. Without a check and balance in practice, we try to replace with a process saying that folks have the credential necessary to do the work. I think it is a good idea. I think clients do get some benefits to the extent to which the process is valid.”*

*~ “[It] provides a mechanism that encourages people to get training or improve practice and weed out those that are not willing to do that.”*

While the majority of interviewees believed that professionalism was a worthy pursuit, some potential/prospective partners, employers, commissioners, and vocal critics expressed concern about the current movement. Specifically, some noted that professionalization could result in a barrier for some groups, specifically people new to the field with minimal experience or those who are interested in the field but are unable to pursue another credential. Also, some respondents noted that while some jobs may include evaluation-related activities among employees’ responsibilities, the main focus is not on evaluation. In these cases, they wondered if professionalization would create a barrier for these individuals. Others raised concerns about the feasibility of the professionalization movement. One noted, “*I don’t know what is feasible. I don’t understand the purpose. How we can have a goal without knowing what is feasible and what is our domain reach?*”

**Rating:** *Area of weakness.*

**Rationale for rating:** Survey results indicate that employers are currently unlikely to take actions that demonstrate they value the CE within their organizations. Data from interviews indicate that there is promise here, however, in that most stakeholders support and generally value the professionalization of the field.

#### **4.1.4. Employer and Commissioner Demand for the CE Designation**

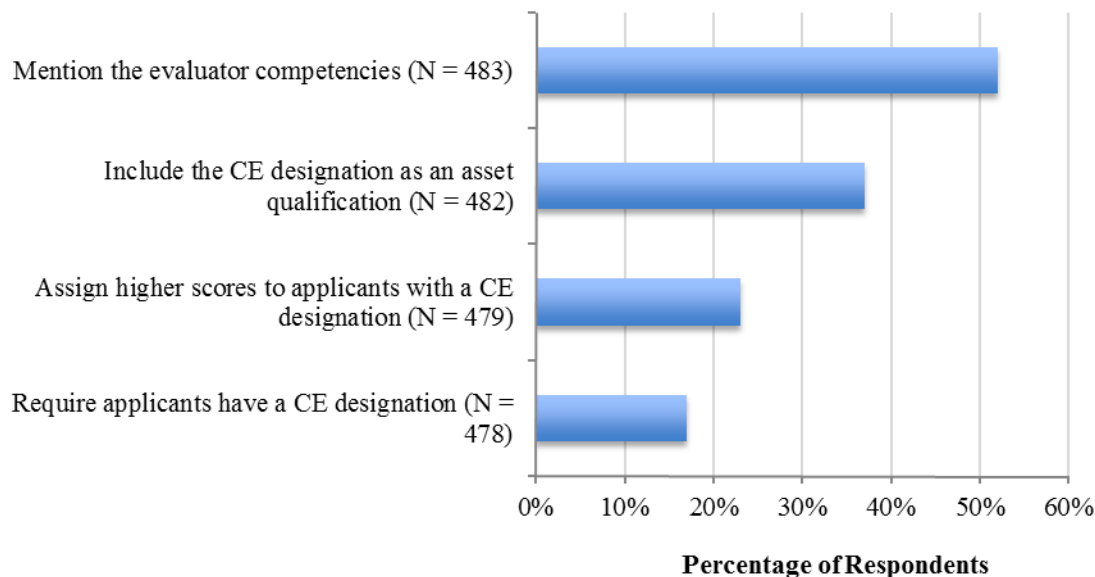
If stakeholders are aware of the credential, recognize evaluation as a profession, and value the CE designation, they may take tangible actions to work with CE designated evaluators (see logic model, Appendix D). In order to obtain an indication of the extent to which employers and commissioners are taking action, we asked evaluators if they have witnessed specific activities in hiring or funding based upon their roles.

Respondents who were employed by an entity were asked to report whether their employers were currently considering the CE in hiring decisions or if they planned to do so in the future. Results indicate that few employers of evaluators were using the CE in hiring practices (CES Members:  $n = 53$ , 12%; Non-members:  $n = 8$ , 4%) or were planning to do so in the future (CES Members:  $n = 55$ , 13%; Non-members:  $n = 6$ , 3%). CES members who worked in the private sector ( $n = 16$ , 30%) were more likely to report that their employers were currently using the CE in hiring decisions compared to those in all other sectors combined ( $n = 43$ , 10%).

Respondents whose job duties involved working to secure external funding or writing RFPs were asked about specific funding practices they witnessed during the previous 4 years. Of the options available, CES members and non-members who held these types of roles most frequently reported seeing funding announcements that mentioned the CES competencies ( $n = 252$ , 52%) and RFPs that included a CE designation as an asset qualification ( $n = 176$ , 37%). Fewer

respondents noted seeing RFPs that included the CE designation as a consideration in scoring ( $n = 108$ , 23%) or as a specific requirement of funding ( $n = 83$ , 17%) (Figure 4).

**Figure 4. Perceived Commissioner Demand for CE Designation (CES Members and Non-CES Members Combined)**



**Rating:** *Area of weakness.*

**Rationale for rating:** Evaluators infrequently noted that several indicators of the demand among employers and commissioners for the CE were present based on their experiences. While mention of the CES competencies and inclusion of the CE designation as an asset qualification is a hopeful sign, the frequency with which evaluators are seeing these actions is still fairly low, indicating there is much room to grow.

#### ***4.1.5. Alignment Between Educational Curricula and Competencies***

The majority of the potential/prospective partners with whom we spoke represented organizations that educate individuals about evaluation, either through traditional university academic programs or professional development. We inquired during interviews about how (or if) participants were using the CES competencies in their work to get a general sense of the extent to which curricula were aligned with the CES competencies—one intended outcome of the CE designation efforts. All potential/prospective partners, with the exception of one entity that primarily provides training for public servants at the federal level reported that they were using the CES competencies to some extent in their coursework. The representative of the entity for which this exception occurred did not elaborate extensively on the use of CES competencies given their role. As a result, follow-up efforts are needed to understand the extent to which professional development in evaluation for public servants incorporates the CES competencies.

Actions taken by these respondents ranged from mapping the CES competencies to the current curricula and adjusting courses to fill identified gaps to briefly familiarizing students within an introductory program evaluation course on the CES competencies. Other actions included but were not limited to listing the competencies at the end of a semester-long introductory evaluation course to reflect upon which items were covered and engaging students in a self-assessment of

their abilities with respect to the competencies. At least one academician noted that they not only covered the competency set with their students, but also reflected upon evaluator competency sets from the federal and provincial governments.

*~“I show my students what they have learned in the course and how that fits into the competencies. When I build my course and when I build new courses I look at them again just to remind myself of what I am trying to accomplish and what I am trying to convey to the students by the end of the semester.”*

*~“I have definitely revised the course, revamped the course, and restructured it actually entirely around teaching core areas around the competencies. So it has definitely impacted how I have taught the course.”*

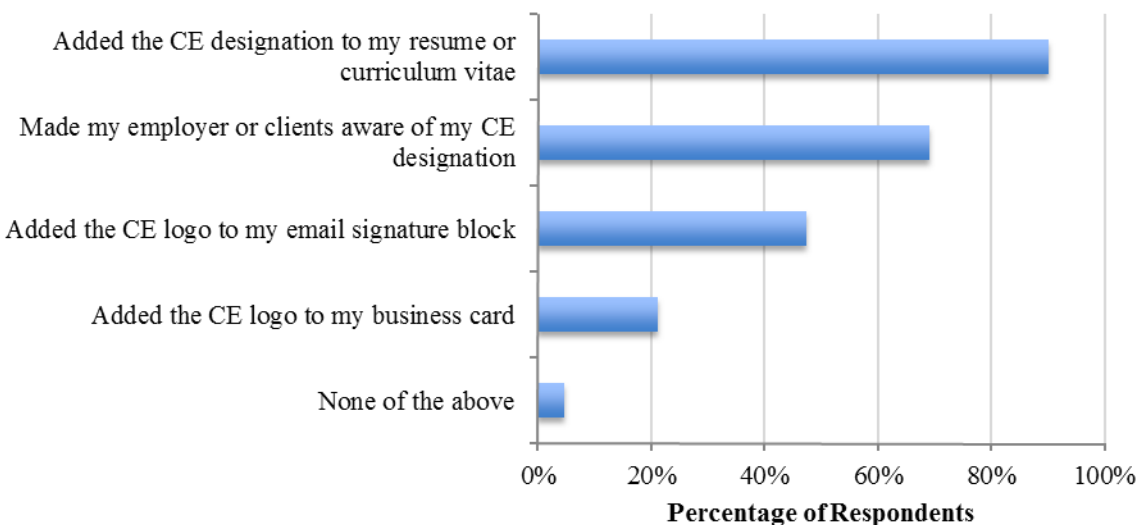
**Rating:** Area with opportunity for improvement.

**Rationale for rating:** The decision to assign this rating was challenging. Extraordinary progress has been made with respect to aligning curricula with the CES competencies—suggesting that this is an area of strength. However, we were unable to fully investigate the extent to which the CES competencies are used within curricula designed to educate public servants. Limited evidence from this evaluation suggests that this may be an area for improvement; as a result CES may wish to gather additional information to see if this claim is upheld.

#### 4.1.6. Identification as a Professional Evaluator

In developing the logic model (Appendix D), stakeholders indicated that another anticipated outcome of the CE designation effort is that CEs will feel more of a belonging to the field and therein increasingly identify themselves to others as evaluators. To examine this outcome, we considered several actions an evaluator might take after receiving the CE designation that would indicate he or she is a professional evaluator (Figure 5). Very few respondents indicated that they had not taken any of the steps listed after receiving their designation ( $n = 9$ , 5%). Almost all reported they had at least included the CE designation on their resume or curriculum vitae ( $n = 175$ , 90%).

**Figure 5. Actions CEs Took After Receipt of the Designation (N = 194)**



We also asked CEs directly how likely they were (relative to before) to describe themselves as evaluators after receiving the CE designation. Approximately one third of CEs ( $n = 64$ , 34%) reported that they were more likely to identify themselves as evaluators after receiving the designation, while the remaining CEs ( $n = 126$ , 66%) indicated that they were neither more nor less likely to do so. This is surprising in light of previous findings from Gauthier, Kishchuk, Borys, and Roy (2015), which indicated that CEs were more likely than non-CEs to define themselves as professional evaluators (72%) or feel more that they belonged to a recognized profession (72%) over the previous four years. These differences may have occurred because our questions asked directly about describing oneself as an evaluator and this change was tied to the receipt of the CE designation.

**Rating:** *Area with opportunity for improvement.*

**Rationale for rating:** CEs do take steps to make others aware that they have received the CE designation. However, in general, few reported being more likely to identify themselves as evaluators than they did prior to receiving the designation. It appears that CEs can take more steps to make others aware of their designation status. Moreover, assuming the baseline rate of describing oneself as an evaluator has not been maximized, there is also opportunity for improvement with respect to defining oneself as an evaluator post-designation.

## 4.2. Effectiveness—Barriers and Facilitators

Several factors can present barriers to or facilitate the adoption of the CE designation among evaluators, as well as serve to strengthen or stymie CES's ability to achieve the intended outcomes of the program. In this section we identify several potential barriers and facilitators, both anticipated and unanticipated, that are currently operating for stakeholders who are central to the success of this program. Some of these relate directly to the relevance and utility of the program, while others speak to the CE designation as part of a complex system of evaluation within Canada.

### Evaluation Questions

With respect to effectiveness:

- What factors present barriers to (or act as facilitators in) realizing the intended outcomes?

With respect to relevance/utility:

- To what extent is the CE designation currently relevant to/useful for Canadian evaluators, evaluation commissioners, employers of evaluators, and potential/prospective partners?
  - What differences, if any, exist in the relevance/utility of the CE designation among the individuals who make up these groups? What factors contribute to the differences observed?
- To what extent is the current Canadian evaluation context conducive to the CE designation?

### SUMMARY

The 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 of or support for the CE designation in the workplace has presented barriers to applying. Evaluators who may be eligible for the CE designation but had not yet applied noted the costs and time associated with the application process.

and pointed to questions about how they would likely benefit from expending these resources as deterrents. Employers and commissioners of evaluation typically viewed the CE designation 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 were already policies and procedures in place that were perceived as presenting challenges to making the CE a *requirement* for hiring or selecting contractors, or to 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 designation as well as for organizations to find means to integrate recognition of it into their current operations.

Topic	Rating
4.2.1. Relevance/Utility	
Perceptions regarding the CE designation’s effect on professional advancement	+/-
Acceptance of the CE designation in evaluators’ work environments*	-
Prevalence of evaluators identifying as evaluators*	+
Prevalence of having qualifications to receive the CE designation*	+
Relevance of the CE to consumers of evaluation services relative to other factors considered in decision-making processes	+/-
4.2.2. Other Potential Barriers	
Application and maintenance procedures*	-
Evaluator perceptions regarding the credibility of the designation*	□
Clarity of benefits associated with having the title of CE*	-
Organizational policies/procedures	+/-
Existing pool of CEs (number and characteristics of)	□
Applicability of CE and CES competencies across contexts	+/-
Clarity about what it means to have a CE designation	-
Perceived quality and credibility of the CE designation	+/-
4.2.4. Facilitators	
Help to achieve career goals (CEs)	+/-
Increase marketability (CEs)	+
Present self as a professional evaluator (CEs)	+

\*Findings from Section 4.2.3 also contributed to these ratings.

#### **4.2.1. Relevance/Utility**

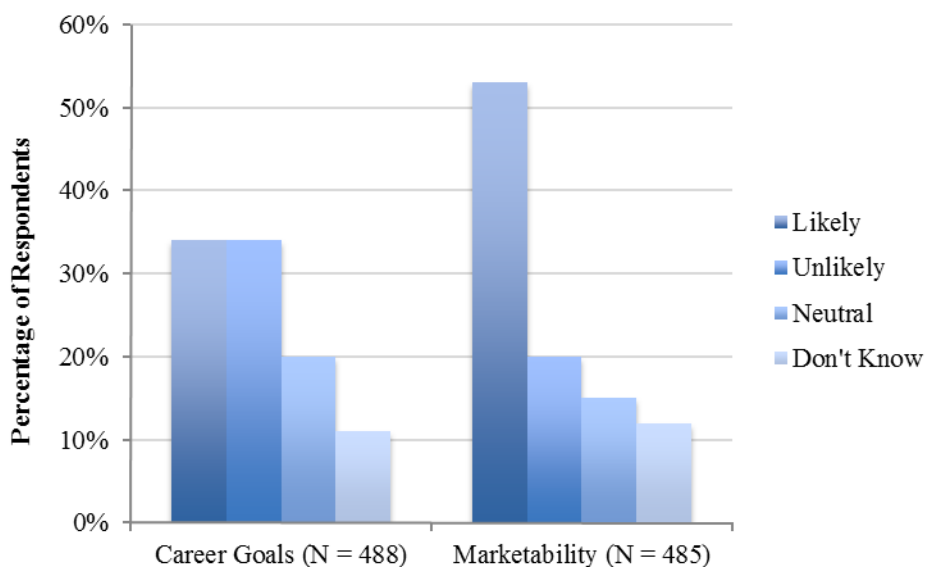
If the CE designation is not seen as relevant or useful among key stakeholder groups, the adoption and promotion of the designation may be slowed down or deemed not possible as it is currently conceptualized. We requested insights from evaluators (CES members and non-members) through the online surveys about several items that indicate the relevance or utility of the designation to them, including: (a) perceptions regarding the CE designation’s effect on professional advancement; (b) acceptance of the CE designation in their work environment; (c) whether the respondent identifies as an evaluator; and (d) the evaluator’s perceived qualifications relative to the CE designation requirements. In addition, we gathered data through interviews



with commissioners, employers, and potential/prospective partners about the extent to which the CE designation was relevant or useful to their work.

Survey participants who were not CEs were asked to indicate the extent to which they believed obtaining the designation would help them attain their career goals and increase their marketability. Respondents were evenly split about the likelihood that the CE designation would help them achieve their career goals, with 34% ( $n = 167$ ) noting it was likely and 34% noting it was unlikely ( $n = 166$ ). Another third of respondents were neutral or did not know if the CE designation would help them in this respect. Slightly more CES members noted it was likely that the CE designation would help to increase their marketability as evaluators ( $n = 257$ , 53%) (Figure 6).

**Figure 6. Reported Likelihood of CE Designation Effects (CES Members)**



We also asked non-members to provide their thoughts about how useful the CE designation would be for their professional careers as well as about the level of importance of several potential factors related to its relevance/utility in their decisions not to apply (Table 6). The majority of respondents reported that the CE would be useful or somewhat useful ( $n = 170$ , 61%).

Of the factors contributing to their decisions not to apply for the CE designation, evaluators most frequently noted its lack of relevance to their work environments. The majority noted as important contributors to not applying the facts that their jobs did not require the CE, there was no financial support from their employers to obtain the CE, and the CE was not recognized in their job environments (Table 6).

**Table 6. Reasons for Not Pursuing the CE Designation Related to Relevance/Utility**

How important is each of the following in your decision <u>not</u> to pursue the CES CE designation?*	CES Members		Non-CES Members	
	N	Important n (%)	N	Important n (%)
<b>Work Environment</b>				
Not required for job	323	225 (70)	94	76 (81)
No financial support from employer	263	153 (58)	66	42 (64)
Not recognized in job environment	306	168 (55)	85	53 (62)
Employer has indicated it is not worthwhile	163	37 (23)	48	19 (40)
<b>Identification as an Evaluator</b>				
I hold other professional designation(s)	257	95 (37)	75	36 (48)
I don't plan to make a career out of evaluation	260	74 (28)	80	34 (43)
I am not involved enough in evaluation	287	81 (28)	89	37 (42)
I am too close to retirement to care	238	62 (26)	80	32 (40)
I don't see myself as an evaluator	267	45 (17)	80	17 (21)
I expect to leave evaluation soon	239	40 (17)	75	25 (33)
<b>Perceived Qualifications</b>				
I don't have enough experience in evaluation yet	289	112 (39)	81	15 (19)
I don't hold a graduate degree	203	38 (19)	65	16 (26)

\* Importance corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is “not at all important” and 7 is “extremely important.”

When examined within sectors, evaluators in the public sector were most likely to indicate that the lack of relevance in their work environment was an important factor. Over 64% of federal sector evaluators providing a response indicated that one of these three factors was important in their decision not to apply—with 83% ( $n = 62$ ) noting that the CE not being required for their job was an important factor. More than 60% of municipal, provincial, or regional public servants also indicated that one of the work environment factors was important to their decisions. In addition, evaluators working in the educational sector frequently rated indicators pertaining to the relevance of the CE in their work environments as important (Not required for job:  $n = 41$ , 71%; Not recognized in job environment:  $n = 36$ , 67%).

Interviews with employers and commissioners of evaluation highlighted some areas of concern with respect to the relevance or utility of the CE designation for their work. Although most were positive regarding the potential value of professionalizing the field of evaluation (see Section 4.1), when making hiring decisions or decisions about funding they noted that when the CE was used as a criterion it was not a make-or-break measure. When asked what was weighed in making these types of decisions, several other factors arose, including but not limited to academic and professional experience, performance on skills/knowledge tests, familiarity with context, and past performance. More than one employer/commissioner noted that the CE did not add extensive value to the decision making process, but it did help to serve as an indication of whether or not an individual or firm was part of the broader evaluation community—typically a “nice to have” criterion.

**Ratings:** *Mixed.*

**Rationale for ratings:**

- *Areas of strength:* The relevance or utility of the CE designation could be limited in circumstances where there is a high prevalence of evaluators who do not identify as

such, or who perceive that they do not have the qualifications necessary to receive the CE. Survey data indicate that these do not tend to present barriers to evaluators applying for the designation.

- *Areas with opportunity for improvement:* Evaluators offered mixed opinions regarding the potential utility of the CE designation for their professional advancement. Specifically, CES members who were not CEs seemed divided on the likelihood that acquiring the designation would affect their professional advancement in terms of achieving career goals or increasing marketability, whereas non-members indicated that the CE would be useful or somewhat useful to their careers. With respect to the relevance of the CE to consumer decision making processes, more than one employer/commissioner noted that the CE did not add extensive value to selection processes, but it was often viewed as a “nice to have” criterion.
- *Area of weakness:* Survey respondents frequently provided indications that the CE designation was not relevant in their work environments. For example, a high percentage noted that the designation was not required for their jobs.

#### 4.2.2. Other Potential Barriers

There are several additional factors, beyond the relevance or utility of the designation, that could pose barriers to realizing the intended outcomes of the CE designation efforts. In the online surveys we asked about several additional factors that may pose barriers as evaluators decide whether or not to pursue the CE designation (Table 7). Of these factors, 50% or more of both CES members and non-members indicated that factors associated with the application and maintenance process were important in their decisions not to apply. The majority of both groups also noted that uncertainty regarding the results of having a CE designation and not seeing enough benefit in getting the designation prevented them from applying.

**Table 7. Reasons For Not Pursuing the CE Designation—Potential Additional Factors**

How important is each of the following in your decision <u>not</u> to pursue the CES CE designation?*	CES Members		Non-CES Members	
	N	Important n (%)	N	Important n (%)
<b>Application and Maintenance Procedures</b>				
It is too expensive	295	179 (61)	83	53 (64)
I do not have the time	341	205 (60)	95	54 (57)
The designation maintenance requirements are too demanding	248	124 (50)	66	40 (61)
<b>Credibility</b>				
It is not a credible designation	270	95 (35)	86	40 (47)
CES is not a credible organization	272	34 (13)	82	15 (18)
<b>Clarity of Designation and Results</b>				
I am too uncertain of the results to invest in this process	335	195 (58)	94	61 (65)
I don't see enough benefit for me	383	201 (52)	107	81 (76)
I am not well informed about the professional designation	306	103 (34)	85	24 (28)

\* Importance corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is “not at all important” and 7 is “extremely important.”

Interviews with stakeholders highlighted several additional factors that may present barriers to the adoption of the CE designation. These include issues associated with organizational policies

or procedures, the number and characteristics of the current pool of CEs, context-based efforts running parallel to the CE designation, and the perceived quality and credibility of the CE designation. We describe each in more detail below.

**Organizational policies/procedures.** Interviewees from federal agencies provided us with details about their procurement and hiring processes. Although several of the representatives with whom we spoke indicated that they did consider the CE in some way—whether formally as an asset in competitions or hiring, or as a general “nice to have” feature on a CV of a prospective candidate—they felt that the process of introducing the designation as a requirement could be lengthy due to existing bureaucratic processes. These representatives also often discussed whether they were able to offer support to employees to obtain the CE designation, whether in the form of direct financial support for the application fee or CES membership, or professional development. Responses varied regarding the types of supports that were available within the federal government; however, several noted that a professional association membership or an application for the credential could not be supported by the government since these items were not required for an evaluator to perform his or her job duties. Professional development, however, did appear to be supported by the government.

*~“If it’s not required to do your job and it’s not part of the hiring decision or it’s not part of your collective agreement, and fundamentally it’s not required for you to do your job, then the government in Canada isn’t going to pay for it.”*

**Current pool of CEs.** Two factors arose with respect to the current pool of CEs—the number available and the level of differentiation between CEs and non-CEs. Several interviewees noted that changing their policies/procedures for hiring CEs or commissioning evaluations from external entities was in part dependent upon there being a larger pool of evaluators with the CE designation to select from. Specifically, they noted that making the CE designation a requirement would limit the number of applicants to select from severely at this point in time. Additionally, although it was not raised as a concern, many commissioners and employers who had worked in some capacity with CEs and non-CEs and who were asked about differences between them noted not having seen any.

*~“I don’t think it would be particularly helpful at this point in time, given my comments about what I know of the number of CEs that are out there, to put it in as an essential—again a mandatory piece. I think you’d limit the pool down to a small handful and that wouldn’t be helpful to the organization generally. You want to get the best person for the job in the door. So it’s going to take time. Until the pool of CEs starts to grow, I don’t think we’re going to shift our position on that with respect to being an asset.”*

*~“I don’t notice any difference between CE and non-CEs. It’s a new program. Evaluators are evaluators. It’s more for professionalization of evaluation. It is creating a designation that can make it more professional.”*

**Applicability of CE designation and CES competencies across contexts.** Interview data suggest that there are other competency sets for evaluators—particularly those developed within the federal government—that are considered when hiring, procuring services, or formulating professional development plans. This is not to say that the CES competencies are dismissed or are not valuable; rather, there are simply other competency sets in use that are very similar but,

according to interviewees, include aspects that account for specific contexts. Additionally, there is currently an open exploration underway by the Center of Excellence for Evaluation, within the Treasury Board of Canada Secretariat, to consider designations for government evaluators. One interviewee explained, “*they are exploring whether or not they should come up with their own, whether they would work with CES, or whether they would say ‘yes the CES one is the one that would be acceptable.’*” Such parallel efforts have the potential to result in confusion among some stakeholders, as indicated by the following interviewee:

*~“There is one thing that I wanted to say and I may have touched on it. I do wonder—I am aware that Treasury Board Secretariat is looking at whether or not the government of Canada should come up with criteria, or criteria to have a designation. and whether or not that would be something different than the CE designation, same, or whether it would be a combination, or how that would work. And I’m not opposed to that. It’s a bit of a mixed message, I think. But it’s too early for me to say that because I don’t know what their results are going to be.”*

**Clarity about what it means to have a CE.** We found a lack of consistency among stakeholders—CB members, as well as among those who were likely to request services of CEs (e.g., employers, commissioners)—about what it means for an evaluator to hold a CE designation. When asked to describe their impressions of what the CE designation means or represents, employers and commissioners provided a range of responses, indicating that they did not have a common understanding of the designation. Two interviewees indicated that they believed the designation represented “expert” working knowledge of evaluation, while half of the interviewees felt the CE signified an “intermediate” or “advanced beginner” level. Some respondents viewed it as a sign of competence in the field, and a small number of interviewees viewed the CE as an indication of one’s commitment to, and/or engagement with, the field of evaluation.

*~“I think that sometimes people think the CE means that you are a senior evaluator, which, obviously, if you look at the criteria, is not the case.”*

*~“[I] have to remind myself often that this is an entry- level. I mean it is only looking for two years of experience, which is something that I often sort of forget*

*~“I would say advanced for sure. I don’t think I’ve ever seen anyone with a CE that isn’t advanced.”*

*~“From what I understand the intention was to set a pretty low bar...with this one. Like it wasn’t intended to be an extraordinarily prestigious, we can guarantee the quality of this evaluator. It was like, this person has kind of a minimum level and some experience.”*

*~“I don’t think I would tend to think of it in terms of experience. I would tend to think of it as someone who has made a commitment to evaluation and has decided ‘that profession is for me.’”*

Along similar lines, we found that several CB members expressed concerns about whether evaluation managers were qualified for the CE. Managing an evaluation, according to these members, is not the same as conducting an evaluation.

*~“They’ve run a program, they’ve gathered some information about results and costs, and they might have had a title, or part of their job description might have been evaluation, but they are not professional evaluators in the core sense. They are public servants mostly, running programs and part of their responsibilities is evaluation or has elements of evaluation.”*

*~“They clearly qualify under this two years experience in evaluation, and they can list off a large number of evaluations they supervise. I personally don’t think that qualifies someone to be a credentialed evaluator.”*

**Perceived quality and credibility of the CE designation.** Perceptions among applicants and CB members regarding the quality and credibility of the CE designation were mixed. In general, these stakeholders felt that the review process was of high quality, that qualified evaluators received the CE, and that the designation was credible. However, they did express some reservations. For example, among CES members who were most likely to be familiar with the details of the application process (i.e., former or current applicants), the majority agreed that qualified applicants receive the CE designation ( $n = 112$ , 62%) and that the CE is a credible designation ( $n = 121$ , 67%; Table 8). However, less than half of these same respondents ( $n = 80$ , 44%) 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.

**Table 8. Agreement with Statements Regarding the Review Process among Applicants**

Please indicate how much you agree or disagree with the following statements as a result of what you observed/experienced with the CE designation.*	<i>N</i>	Agreement <i>n</i> (%)
The CE designation is credible	181	121 (67)
Qualified evaluators receive the CE designation	182	112 (62)
The ultimate decision of whether someone qualifies as a CE is fair	182	94 (52)
The CB implements a high-quality review process	182	80 (44)

\* Agreement corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is “strongly disagree” and 7 is “strongly agree.”

Most CB members viewed the CE designation as credible. The majority of members noted that both CES and CB members are highly regarded in the evaluation community and, as a result, the designation holds credibility. Some CB members also suggested that the three components of the application process (i.e., 2 years full-time experience, advanced degree, and competency requirements) are fairly rigorous, adding to the credibility. CB members who questioned the credibility of the designation primarily did so as a result of assumptions they held about the extent to which stakeholders in the evaluation community were adopting or recognizing the CE designation. Additionally, several CB members worried that, when compared to other well-recognized and well-understood professional designations (such as in the field of accounting), stakeholders may perceive the CE as having lower credibility.

The members of the CB generally believed that the evaluators who have received the CE were qualified. They were hesitant, however, to say that they conduct high quality reviews. Some members believed CB members had relatively high consistency, but others expressed concern. Several members suggested that the application process itself selects for qualified evaluators for a variety of reasons including the rigor, level of effort, cost, and amount of reflection that the application requires. Some CB members noted that although they had seen evaluators awarded

the CE who they felt did not deserve the designation, this was a rare occurrence.

*~“Having people go through the energy of reflective practice and pulling it together and putting it into those categories. Some people start the process and might not do it and don’t proceed. Others reflect and get through the process. Most that go through are likely deserving of the CE.”*

*~“We have a selection bias in our applications because the process is quite rigorous. It also cost quite a bit, and I think we get people that are likely to succeed.”*

*~“What I don’t know is whether my concept, standards, criterion to the details is the same as the other reviewers—in other words, whether there is consistency across the board. And citing my earlier examples, it seems there is some inconsistency out there. If there is inconsistency on some of these things then maybe I am the one that is inconsistent. I don’t know because we don’t get any feedback.”*

Comments from some members of other stakeholder groups (i.e., employers, commissioners, vocal critics) raised questions about the extent to which various parties outside of CES have insight into the level of rigor or quality of the process used by the CB. For example, some noted that they simply did not know what the process looked like or how it was employed, and they therefore wondered about the quality. Others viewed the review process as somewhat insular, with at least one individual noting that it concerned them that they did not know who were members of the CB.

*~“I think it is a great idea. The specifics of how that gets carried out, I don’t—I’m not as familiar with who they—how stringent the process is, etc....I would hope that the standards are high enough, and the selection process is rigorous enough.”*

*~“I am worried about who these people are who make this designation decision, how they got to be there, whether or not there are controls in place to make sure there isn’t bias. I don’t know if these controls are even in the process, and I don’t know how the people that got there are making a decision about me, being a CE. Who decided you can sit and make a judgement of my abilities and me?...My understanding is that the Credentialing Board are just people who are the old boys and girls club from CES. It’s past winners of the evaluation contribution to Canada, blah. It is essentially a list of ex-presidents of CES....I don’t know who these people are, why they are there, if this process has any integrity. I don’t even know if the process has any credibility.”*

**Ratings: Mixed.**

**Rationale for ratings:**

- *Area of strength:* Survey findings suggest that the majority of evaluators, whether CES members or not, viewed the CE designation and CES as credible.
- *Areas with opportunity for improvement:* Existing policies and procedures within organizations we interviewed, specifically the federal government, sometimes supported the CE designation as a “nice to have” feature when hiring or selecting evaluation contractors. However, interviewees varied regarding the extent to which they believed several steps to support acquiring the CE designation were possible within existing organizational policies/procedures. The concept of evaluator competencies and credentialing appears to resonate with audiences, but in some cases the CES competencies and CE designation may not be tailored enough for acceptance by all audiences. Moreover, the perceived quality and credibility of the CE designation was mixed. Although many stakeholders indicated that they viewed it as credible and believed that qualified evaluators had

received the designation, too many questions remain among stakeholders about the actual process that is in place to review and score applications and the extent to which reviewers implement procedures with high quality.

- *Areas of weakness:* Respondents to the surveys too frequently indicated that the expense and time commitment associated with applying for and maintaining the CE designation, as well as their level of uncertainty regarding the potential benefits of the CE designation to them, discouraged them from applying. Extensive variation existed among stakeholders regarding what it means to hold a CE designation (e.g., expert, intermediate, or advanced beginner knowledge) and who is qualified (e.g., evaluation managers versus evaluation implementers). A final area that appears to be a weakness relates to the limited pool of evaluators who currently hold the CE designation. Several employers and commissioners indicated a hesitancy to require it when hiring evaluators or selecting contractors, largely because they were concerned about excessively limiting their pool of available candidates.

#### **4.2.3. Relative Importance of Identified Barriers for Evaluators**

We asked survey participants to select (from their list of barriers of importance) the top three barriers preventing them from applying for the designation, and rate how likely they would be to apply for the designation if these top barriers were removed or were no longer an issue. Table 9 displays each barrier identified by participants and the percentage of participants who rated it as a top barrier. Overall, the top barriers that participants identified as preventing them from applying for the credential were (a) that they do not see enough benefit in the CE, (b) that the designation is not a requirement for employment, and (c) that the application process is too demanding.

**Table 9. Top Barriers to Applying for the CE Designation**

<b>Please indicate the <u>three</u> factors that are most influential in your decision <u>not</u> to pursue the CE designation.</b>	<b>CES Members <i>n</i> (%)</b>	<b>Non-CES Members <i>n</i> (%)</b>
I don't see enough benefit for me	101 (24)	46 (13)
It is not required in my job	93 (22)	27 (8)
The application process is too demanding	93 (22)	25 (7)
It is too expensive	86 (20)	16 (4)
I am too uncertain of the result to invest in this process	80 (19)	11 (3)
I do not have the time	75 (18)	11 (3)
I don't have enough experience in evaluation yet	67 (16)	3 (1)
It is not recognized in my job environment	46 (11)	16 (4)
I hold one or more other professional designations	44 (10)	19 (5)
I have no financial support from my employer	44 (10)	10 (3)
I am too close to retirement to care	36 (9)	20 (6)
The designation maintenance requirements are too demanding	32 (8)	11 (3)
I am not involved enough in evaluation	27 (6)	10 (3)
I am not well informed about the professional designation	27 (6)	2 (1)
I don't hold a graduate degree	23 (5)	9 (3)
It is not a credible designation	23 (5)	17 (5)
I don't intend to make a career out of evaluation	18 (4)	19 (5)
I don't see myself as an evaluator	9 (2)	5 (1)



<b>Please indicate the <u>three</u> factors that are most influential in your decision <u>not</u> to pursue the CE designation.</b>	<b>CES Members <i>n</i> (%)</b>	<b>Non-CES Members <i>n</i> (%)</b>
I expect to leave evaluation soon	9 (2)	7 (2)
My employer has indicated that it is not worthwhile	5 (1)	2 (1)
CES is not a credible organization	2 (1)	1 (1)

Survey respondents who identified barriers also rated the likelihood that they would apply for the designation if each of their top three barriers were removed. Overall, respondents, especially CES members, reported being very likely to apply for the CE designation if their top barriers were removed (Table 10). For example, 94% of CES members ( $n = 80$ ) who identified cost as being a major barrier reported that they would apply for the designation if expense were no longer an issue.

**Table 10. Likelihood of Applying for CE Designation if Barrier Removed**

<b>If the following barriers [top three selected] were overcome, how likely would you be to apply for the CE designation?*</b>	<b>CES Members <i>n</i> (%)</b>	<b>Non-CES Members <i>n</i> (%)</b>
It is too expensive	80 (94)	12 (75)
The application process is too demanding	87 (94)	18 (72)
I don't hold a graduate degree	21 (91)	7 (79)
The designation maintenance requirements are too demanding	29 (91)	7 (64)
I have no financial support from my employer	39 (89)	8 (80)
I don't have enough experience in evaluation yet	57 (85)	3 (100)
I am too uncertain of the result to invest in this process	65 (82)	6 (55)
I am not involved enough in evaluation	22 (82)	5 (50)
It is not required in my job	74 (80)	18 (64)
I do not have the time	59 (80)	6 (55)
My employer has indicated that it is not worthwhile	4 (80)	0%
I am not well informed about the professional designation	20 (77)	1 (50)
It is not a credible designation	16 (70)	12 (71)
I don't see enough benefit for me	68 (68)	22 (48)
It is not recognized in my job environment	30 (65)	8 (50)
I don't see myself as an evaluator	5 (56)	2 (40)
I don't intend to make a career out of evaluation	10 (56)	7 (37)
CES is not a credible organization	1 (50)	0%
I am too close to retirement to care	15 (42)	3 (15)
I expect to leave evaluation soon	3 (33)	2 (29)
I hold one or more other professional designations	13 (32)	3 (16)

\* Likelihood corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is "not at all likely" and 7 is "extremely likely."

### **Ratings: *Mixed*.**

**Rationale for ratings:** The selection of the top barriers to applying for the CE designation contributed to the ratings of indicators under Section 4.2.2.

- *Areas of strength.* Rankings in this section provide additional clarity that the prevalence of practitioners who see themselves as evaluators or who perceive that they do not have the required qualifications to receive the CE designation are not barriers to their adoption of the CE designation. This is indicated by the low percentage of respondents who indicated that the top barriers to applying include

factors such as not being involved enough in evaluation, not holding a graduate degree, or not seeing themselves as evaluators. Additionally, very few individuals (5% or fewer) rated factors associated with the credibility of the designation or CES as top barriers influencing their decisions not to apply.

- *Areas of weakness.* The level of effort and expense associated with the application process was frequently ranked as one of the top barriers to applying for the CE designation. Moreover, the perception that there was not enough benefit or a lack of clarity regarding the potential benefits associated with having the designation were also frequently ranked among respondents' top three barriers.

#### **4.2.4. Facilitators**

We asked respondents to the CES member survey who had obtained the credential to explain which of following factors contributed to their decisions to apply for the CE designation: (a) it could help them achieve career goals; (b) it could increase their marketability; and (c) it could help them present themselves as professional evaluators. The most frequently reported reason for applying was to present as a professional evaluator ( $n = 137$ , 78%), followed by increased marketability ( $n = 114$ , 65%). CEs applying as a way to present as professional evaluators or to increase their marketability were most frequently between the ages of 40 and 59, spent more than 75% of their time working in evaluation, had master's degrees, did not hold professional designations other than the CE, and worked as consultants in the private sector. Evaluators reporting that they applied hoping that the CE would help them achieve their career goals ( $n = 77$ , 44%) differed slightly in their demographics—they were largely a younger group of evaluators, typically aged 30–39.

Thirty CEs provided other reasons why they applied for the designation. The most frequently mentioned reason was to support the process of the CE designation and professionalization of the field ( $n = 11$ , 37%). CEs also mentioned that their employers either required or suggested applying for the CE designation ( $n = 7$ , 23%) or that it increased their ability to apply for or win work ( $n = 3$ , 10%).

Interviews suggest that private consulting firms were much more likely than those in the public sector (specifically the federal government) to engage in practices that would facilitate the acquisition of a CE among its employees. Private firms tended to encourage and financially support their employees to apply for the CE designation.

Commissioners and employers that used the CE designation in making decisions sometimes elaborated on why they had done so. Responses included that the CE provides credibility to the work performed; having CE evaluators may increase marketability to prospective clients; using the CE can help to obtain a better pool of candidates and facilitate the development of a shortened list of individuals to get to know better; it provides an indication that an individuals' skills and knowledge have been kept "fresh"; and adopting the CE designation is simply helpful to the evaluation field.

**Ratings:** *Mixed.*

**Rationale for ratings:**

- *Areas of strength:* CEs very frequently noted that they applied for the CE designation to increase their marketability or to present as professional evaluators.

- *Area with opportunity for improvement:* Less than 50% of evaluators who applied for the CE designation noted that it was to help them achieve their career goals.

### 4.3. Efficiency

The efficiency of the application process was a particular area of interest for the stakeholders of this evaluation. Extensive time and effort has gone into designing and executing the process for accepting, reviewing, and scoring applications—the large majority of which has been performed with volunteer hours. In this section we present findings about the current levels of efficiency, with specific attention to the factors that may affect the efficiency of current processes from the vantage point of those applying for the CE designation as well as of those who perform the reviews.

#### Evaluation Questions

- What aspects of the CE application and review process are or are not operating efficiently for evaluators who have applied for the CE designation and the Credentialing Board?
  - In what ways, if any, does the efficiency vary by the type of CE application process used (e.g., regular or fast-track)?

#### SUMMARY

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 when compared to those who applied through the regular mechanism. CB members, however, varied in their opinions regarding the fast-track process. Although it 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.

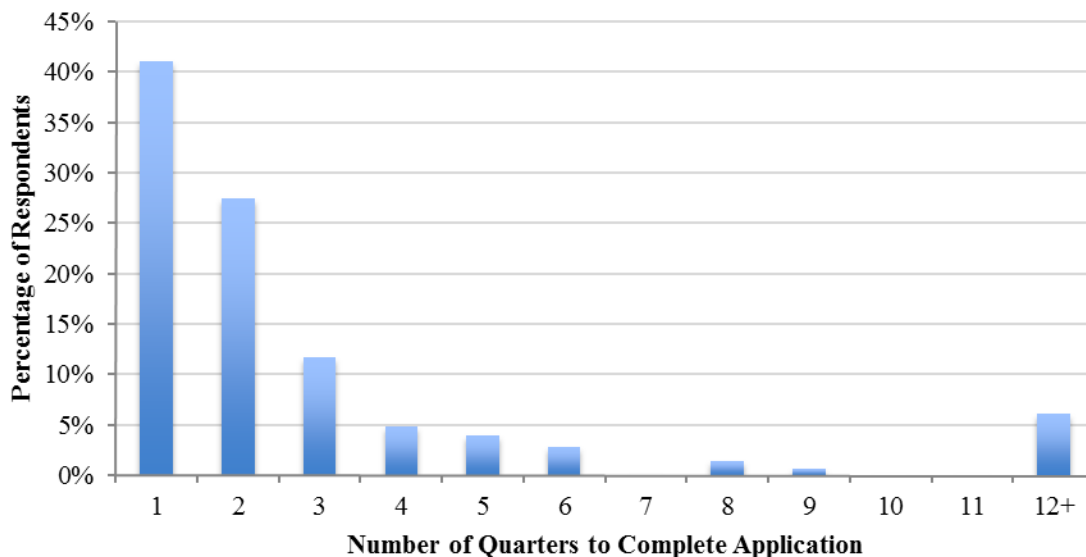
Topic	Rating
4.3.1. Efficiency of the application process	
Efficiency of application process from applicant viewpoint	+
Efficiency of application process from CB member viewpoint	+
4.3.2. Potential factors affecting efficiency	
Ease and clarity of the application process	+
Ease and clarity of reviewing the CES competencies	□□□
Communications—CB and CES	□□□
CB Member Training	□□□

#### 4.3.1. Efficiency of the Application Process

Both applicants and CB members reported that the efficiency of the application process was favorable from their viewpoints. Nearly two thirds of the respondents to the CES member survey who had applied for the designation reported that the level of effort they expended to develop the application was “acceptable” ( $n = 163$ , 66%), whereas only one fourth of these applicants ( $n = 59$ , 24%) felt the level of effort was “too high.” Other survey responses align with this reported

level of effort—applicants most frequently reported starting and completing the application in the same quarter ( $n = 60, 41\%$ ; Figure 7).

**Figure 7. Time to Complete CE Application ( $N = 146$ )**



CB members typically reported that the overall process of reviewing and scoring applications was efficient. They cited the process of distributing applications for review and the online review system as contributing to this efficiency, with several members noting that the new online system was much more efficient than the previous platform. We were unable to corroborate this self-reported efficiency with secondary data documenting the service standards, as these data were not made available to the evaluation team. It should be noted, however, that several members of the CB expressed a desire to extend the service standards to allow for more than 15 days to complete the review process, noting that each application can take several hours to review, presenting difficulties during busy seasons, such as summer and winter holidays.

**Ratings:** *Area of strength.*

**Rationale for ratings:** The majority of individuals who have applied for the CE designation indicated that the level of effort they expended to develop the application was acceptable; most completed the application within two quarters. CB members frequently noted that the application review and scoring process was efficient.

#### **4.3.2. Potential Factors Affecting Efficiency**

There are several factors that have the potential to affect the efficiency of the application process. The evaluation team specifically examined stakeholder perceptions of several factors hypothesized as potential areas that could affect performance: (a) the ease and clarity of the application process; (b) the ease and clarity of reviewing the CES competencies; (c) the type of application (fast-track or regular); and (d) the characteristics of existing communications and support. In addition, we examined additional themes that emerged from interviews with CB members.

**Ease and clarity of the application process.** Respondents to the CES member survey who had applied for the CE designation responded to several questions about the ease and clarity of the application process (Table 11). The majority reported that the information they obtained prior to applying was clear. Additionally, the majority of respondents agreed with several positive statements regarding the ease of the application process. However, there appears to be substantial room for improvement with respect to alerting applicants to information that is missing from their applications and upcoming submission deadlines.

**Table 11. Ease and Clarity of the Application Process**

	<i>N</i>	<b>Clear/Agree <i>n</i> (%)</b>
<i>Please indicate how clear or unclear you found each of the following components preceding the application process.<sup>a</sup></i>		
Program Requirements (e.g., education, evaluation experience)	248	205 (83)
How to Apply	248	202 (81)
Application Deadlines	243	189 (78)
Maintenance Requirements (e.g., CES membership, ongoing learning)	247	179 (73)
<i>Please indicate how much you agree or disagree with each of the following statements about the application process.<sup>b</sup></i>		
I was able to understand when I had completed the entire application and it was ready to submit <sup>c</sup>	183	150 (83)
The application instructions were clear	240	185 (77)
I received timely feedback from CES about the Credentialing Board's decision on my application <sup>c</sup>	181	127 (74)
I was able to reach someone at CES when I had questions	160	109 (68)
The online platform for the application was user-friendly	228	126 (55)
CES kept me informed about information missing from my application	93	46 (50)
CES kept me informed about my upcoming submission deadline	143	62 (43)

<sup>a</sup> Clarity corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is "very unclear" and 7 is "very clear."

<sup>b</sup> Agreement corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is "strongly disagree" and 7 is "strongly agree."

<sup>c</sup> Analyses were conducted for those for whom the response was most applicable—i.e., those who completed an application and received a response or were awaiting a determination.

It is important to note that almost all individuals responding to this survey provided the ratings in Table 11 based upon the use of an online system with which there were known issues. A new online platform was recently put into operation. Indeed, additional details provided by respondents via open-ended questions indicated that the most common issue was difficulties with the old online system. Nevertheless, some applicants specified they were using the new platform and coming up against some challenges. For example, one individual stated that they were experiencing, "*lots of glitches, such as not saving the posted information or not recognizing the French accents.*"

Specific feedback regarding communications included providing a means to communicate with French-speaking applicants when they reached out to the CES with questions. Additionally, some respondents expressed that they had difficulty finding the relevant guidelines and instructions for completing the application and suggested that the CES provide a walk-through

case study or short video detailing the application procedures. This indicates additional instructions for how to complete the application may be warranted.

**Ease and clarity of reviewing CES competencies.** We asked CB members about the ease with which they could assess CES competencies while reviewing applications. This inquiry yielded mixed results; those who reported challenges noted issues with the online platform, the completeness and quality of information provided by applicants, and the degree of duplication. For example, several CB members noted that the new online platform had increased the efficiency of the review process. However, others noted that the structure of the system made it difficult to assess an applicant's competency.

*~"[Reviewers] don't have the whole application in front of us and we can only view one set of competencies at a time."*

CB members commonly mentioned two issues with applications that affected the efficiency and quality of their reviews—completeness and quality. Several CB members noted that applicants did not always provide enough information for each competency, or that they may have only completed the minimum competencies (70%) in a given section. This pattern concerned some CB members who noted that if applicants only complete 70% of the competencies, they do not necessarily have to demonstrate their competencies in areas that members believe are critical, such as ethics. The quality of the application also impacted CB members' confidence in the review process. Several members stated that poor quality applications occasionally required them to request additional information from the PDP Secretariat or to look up the applicant online.

*~"If the applicant understands the competency and provides sufficient evidence and details in his/her response, then assessment is straightforward."*

*~"Something that really irritates me about the application is that some of the applicants are completing 7 out of 11 competencies because they think that's all they need. I think we should get the message out that they should complete them all because they are putting the reviewers in an awkward situation, in that if I fail them in one category it is an overall failure. They haven't left me any wiggle room and I don't know in the application process where they get the idea that they should only complete like 5 out of 7. And that has put me in an awkward situation because a failure in one category is going to result in a failure of the entire application."*

*~"People will take the chance and answer only the 70%. When I see people not answering the one on ethics or the one on historical and theoretical base of evaluation, I get nervous because they may meet the 70% but I feel like there are things that are fundamental that they haven't answered. So then you're stuck between a rock and a hard place because technically they're meeting the 70% but the core competencies are omitted."*

When examined in light of responses provided by applicants who felt that the level of effort to develop the application was too high, some clear patterns emerged: Both CB members and applicants indicated that the level of duplication in responses to the competencies is challenging. When asked about the assessment of competencies specifically, CB members reported that this portion of the application is repetitive. They suggested this is due to an overlap in competencies as well as a tendency for applicants to use the same examples across responses. Applicants who viewed the level of effort as too high echoed this statement, noting that they often found themselves repeating the same information across competencies.

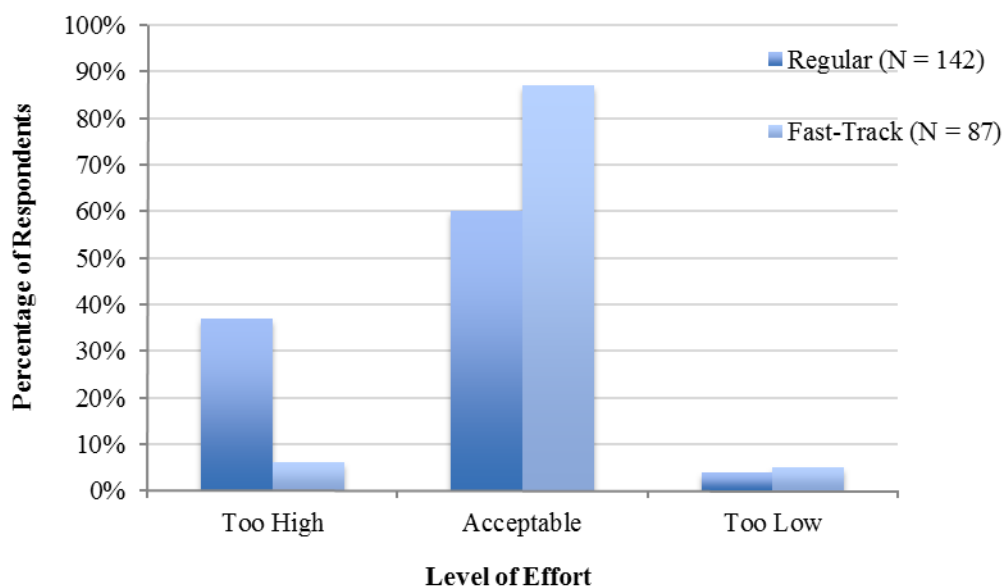
~“I find it cumbersome and repetitive and annoying. We go through all of [them], one competency after another, and read the stuff. And [we] know that the applicant is struggling to not repeat themselves too much, but they obviously can’t avoid it, so you see the same stuff coming up again and again. I find it just, in a way, painful.”

~“It took between 25 and 30 hours to complete my application. I felt this to be too long because much of the information was duplicative. That is, the same information could be provided for multiple requirements.”

**Type of application: Fast-track or regular.** The type of application an individual completed or reviewed could affect the efficiency or quality of the application process. To better understand how the type of application may contribute to the performance of the application process, we examined survey data by respondent type (fast-track or regular applicant) and asked CB members to share their experiences reviewing each type of application. Answers from the applicant point of view highlight efficiencies with the fast-track process, whereas CB member impressions were mixed.

As seen in Figure 8, the large majority of applicants reported that the level of effort necessary to apply was acceptable, regardless of the form used (Regular:  $n = 85$ , 60%; Fast-track:  $n = 76$ , 87%). However, applicants using the regular form reported much more frequently that the level of effort was too high compared to fast-track applicants (Regular:  $n = 52$ , 37%; Fast-track:  $n = 5$ , 6%). This perception was nominally supported by the amount of time applicants reported elapsing between the time they started and submitted their applications—on average, respondents who completed a fast-track application reported that it took them two quarters to do so, whereas those completing a regular application took approximately three quarters. Fast-track applicants more frequently reported completing their applications in the same quarter ( $n = 32$ , 48%) than did regular applicants ( $n = 26$ , 33%).

**Figure 8. Reported Level of Effort by Type of Application**



An analysis of the 2014 CES member survey indicated that CEs who completed the regular and fast-track applications were satisfied overall with the application process (Regular:  $n = 31$ , 72%; Fast-track:  $n = 67$ ; 76%). Consistent with the data in the current evaluation, data from the 2014 survey suggest that a larger percentage of fast-track applicants ( $n = 70$ , 80%) were satisfied with the overall level of effort required to complete the application compared to those who completed the regular application ( $n = 22$ ; 51%). A greater proportion of CEs who completed the regular application, however, were satisfied with the fairness of the decision made by the CB ( $n = 30$ ; 70%) compared to the fast-track applications ( $n = 49$ , 56%).

Members of the CB reported mixed impressions of the fast-track versus the regular application review and scoring process. CB members who favored the fast-track application from an efficiency perspective noted the provision of a CV and the increased likelihood that applicants were competent evaluators factored into this efficiency. CB members who did not feel the fast track was necessarily more efficient mentioned that the quick form application did not provide them with enough information to make an assessment. A couple of interviewees noted that the fast-track application was best suited for very experienced evaluators and it would be beneficial to maintain the regular application process as well.

*~“More confident because the guys in the fast track were really top drawer. The applicant[s] themselves had to meet criteria before being accepted to fast track. So right off the bat, you’ve already [got] amazing people applying. Looking at their CV and slice of practice, I was much more confident. Not because of me but the screening process to get into the fast track.”*

*~“Much more variability in the fast track. Some were detailed, included resumes, examples, and clear explanations of achievement of competencies. Others lacked the above and didn’t provide enough information to make a confident decision without asking for additional information.”*

*~“Strong supporter of the fast track for experienced evaluators, but the regular process is a great pedagogical tool for applicants.”*

**Communications.** Clear and productive communications between the CB and the CES board—and the CES administration more broadly—as well as between members of the CB may affect the efficiency and quality of the review process. The majority of CB members noted that they were clear about the expectations CES had for them and expressed that they were pleased with the current mode of communication between the CB and the CES board (i.e., through the vice president, who is a member of both boards). CB members expressed little interest in more interaction than they already had with the CES board, and some noted that they enjoyed the level of independence they were granted. A few interviewees noted that they were sometimes unclear about the roles and boundaries of the CB, primarily because the CB was still developing. A handful of CB members suggested that the two boards could interact more to develop a strategic plan for the designation.

When asked to report about the extent to which they were clear about the expectations of the CB, the majority of CB members reported the expectations CES had of them were very clear. Those who stated that they were clear on the expectations of CB members primarily credited that clarity to the training or shadowing/mentoring procedures.

*~“[The process is] pretty clear and straightforward. Never had any problem or issue with that. I know what I am supposed to do and I know the criteria. And there is some backup material.”*



*~“I am clear about most of the expectations. I received a group orientation to the review and scoring process and, although CB meetings and discussions are infrequent, I have been able to raise issues and obtain clarification.”*

There were a few minor indications that communications about updated procedures could be more timely or that communications during the application process could be more efficient. Specifically, although CES had confirmed that a CV is now part of the regular form, the interview data revealed that CB members were unclear on the current status of including a CV with the regular process and they had not seen it as part of the application. Additionally, although the CB terms of reference and guidelines stated that the PDP manager/administrator would screen for education and work experience requirements, some CB members noted that this information was not readily available or clear to them; if they wanted to see it, they had to ask.

Almost all CB members reported that their primary form of communication with each other was through the online forum and a meeting during the annual CES conference. Some members reported being satisfied with the online forum, noting, *“it depends on the issue or time of year, but it’s well used and easy to communicate with the whole board or specific members. People aren’t shy about using it.”* However, others pointed to some difficulties with using the online forum, including missing out on conversations due to time zone differences or available time. Most CB members expressed interest in having more face-to-face meetings or teleconferences with fellow CB members. In general, most suggested at least one other point of contact throughout the year in addition to the CES annual conference, while others recommended adding two to three meetings.

*~“I think the members of the board need a little more time together. We have a meeting at the annual conference; it is usually a breakfast meeting. We go through some procedural things that have to be dealt with. We haven’t had time to bring out any issues, and I would like to see some discussion on some issues.”*

**CB member training.** Training of CB members, in particular trainings to establish inter-rater reliability, have the potential to affect the efficiency or quality of the application review process. As described by Barrington and colleagues (2015), initial training efforts for CB members included reviewing and scoring mock applications followed by a teleconference training, during which time CB members had lengthy discussions about several aspects of the criteria and application. Additional discussions were scheduled with the CB and a second mock application session took place in the fall of 2010. CB members who joined later in the process (Fall 2013) did not engage in a similar training process, but were instead paired with mentors. Together they reviewed and scored an application, and new members followed up with their mentors for consultation.

More senior members of the CB expressed that newer members should receive more rigorous training. Those who participated in the shadowing and mentoring reported, however, that the activity was helpful in clarifying expectations. Some CB members suggested participation in additional training sessions that incorporated mock or hypothetical applications. Those who suggested more training often reported that they would like to see annual training sessions.

*~“In the beginning, I thought that the process was quite well done in getting the Credentialing Board to be consistent in rating. For example, we had mock ratings and discussed differences to ensure [we were] evaluating the applications in the same way. Biggest complaint is that these training sessions haven’t gone on annually, just the mentoring program [is] not as rigorous as*

*the training in the beginning.”*

*~“Two mock evaluations every year that we all responded to and talked about differences would help normalize the evaluations.”*

*~“The shadowing was the most helpful.”*

**Ratings:** *Mixed.*

**Rationale for ratings:**

- *Area of strength:* Survey respondents provided no indication that the clarity and ease of the application process was affecting efficiency. The large majority of individuals who had applied for the CE designation agreed that the majority of application procedures were clear or generally positive.
- *Areas with opportunity for improvement.* CB members indicated that the completeness of applications with respect to the CES competencies as well as the level of duplication between responses across CES competencies could be improved upon. Members of the CB indicated that they were pleased with the current arrangement regarding communications to the CES board through the vice president and that the expectations for their service as CB members were clear. However, some narratives from interviews indicated room for improved communications—for example, some members were confused regarding whether a CV was now a typical part of the application process. Furthermore, several CB members suggested engaging as a group more regularly outside of the existing online forum. Findings from this evaluation also suggest room for improvement in CB member training. Although some members expressed satisfaction with the current mentoring process, others indicated that annual training sessions with hypothetical applications would be valuable.

#### 4.4. Unintended Impacts

This section explores potential effects of the CE designation that were not articulated in the draft logic model. We specifically asked about potential unintended outcomes (i.e., marketability and achievement of career goals) and allowed others to emerge through our data collection and analysis efforts.

##### Evaluation Questions

- What, if any, positive or negative unintended consequences of the PDP have members of the stakeholder groups experienced or perceived?
  - To what extent and how do aspects of the PDP activities contribute to these consequences?

#### SUMMARY

Stakeholders had a mixed response regarding the occurrence of several potential positive and negative unintended impacts that we specifically inquired about. Less than half of the evaluators who responded to our surveys and who had received the CE designation felt it improved their marketability or helped them achieve some career goals. Approximately half of the CEs who responded 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 CE was worth the resources they expended. The majority of participants in this evaluation did not report negative effects of the CE designation to date.

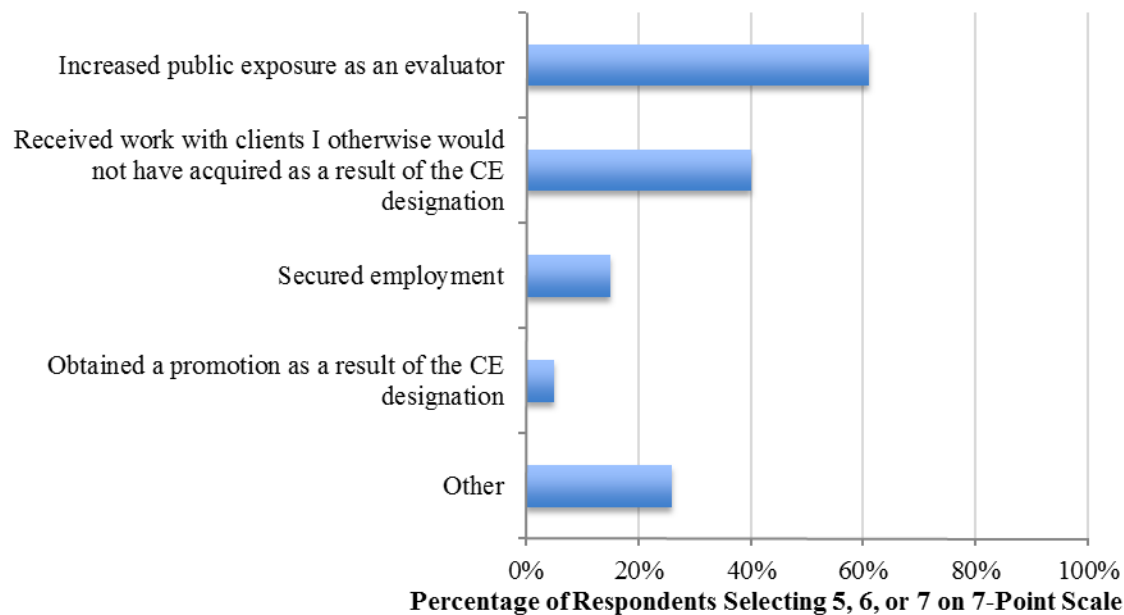
Topic*	Rating
4.4.1. Marketability with the CE designation	+
4.4.1. Achievement of career goals with CE designation	+
4.4.2. Application process as a learning tool	+
4.4.3. Perceived value of receiving the CE designation	+
4.4.1– 4.4.4 Unintended negative outcomes	+

\*Summary statements of ratings are not provided in this section. Sections 4.4.1– 4.4.4 indicate potential positive unintended outcomes, all of which appeared to warrant, to some extent, a rating of “area of strength.” Evidence of unintended negative outcomes was not seen, also making this an area of strength.

#### ***4.4.1. Marketability and Achievement of Career Goals***

Forty-two percent ( $n = 81$ ) of responding CEs indicated that they believed that the designation had made them more marketable, while 32% ( $n = 61$ ) reported that it had helped them to achieve a career goal. Figure 9 displays the ways in which these CEs believed the credential made them more marketable or helped them achieve a career goal. The majority of “other” responses centered on CEs adding to their professional credibility.

**Figure 9. Achievements Related to Marketability or Career Goals ( $N = 82$ )**



#### ***4.4.2. Application Process as a Learning Tool***

Slightly over half of those who had completed or were in the process of completing an application ( $n = 138$ , 54%) reported that reflecting on the application process facilitated learning (indicated by selecting a 5 or above on a 7-point agreement scale), while 36% ( $n = 91$ ) reported that they did not agree that the application process facilitated learning. We also examined the degree to which CEs specifically felt that the process helped them reflect upon areas of self-improvement. Overall, those who received their CE designation expressed a similar level of

agreement as all applicants, such that 55% of CEs ( $n = 106$ ) agreed that the application process facilitated learning, while 33% ( $n = 63$ ) disagreed.

#### **4.4.3. Perceived Value of Receiving the CE Designation**

Just over half of the CEs responding to the CES member survey reported that the value received from the credential was sufficient compared to the resources they expended to go through the process ( $n = 106$ , 55%). Overall, these respondents indicated that most of the value had come from increasing the recognition of evaluation and the credibility the CE provided.

*~“I feel it makes me credible as an evaluation expert. It helps clients feel comfortable that the advice I provide is reliable and valid.”*

*~“As a young professional, earning the CE designation affords me the necessary credibility to undertake evaluation work. It’s helpful that each of our files is reviewed by an independent board. That adds to the credibility.”*

*~“Credibility as an evaluator—for a field where many people don’t fully understand the work, it’s now implied that I’ve been judged by those who know the field well and have deemed me competent.”*

CE respondents who reported not seeing value in the designation in keeping with the resources they expended ( $n = 39$ , 21%) described the ways in which the value had fallen short. Some noted that they had not had the designation long enough to see advantages; others expressed that it had not resulted in garnering additional work because it is not currently recognized or valued by employers or entities with whom they were seeking to do business.

*~“The CE designation is in its infancy and is not recognized in my employment sector (i.e., for promotion, formal recognition, etc.) yet. The “value” of this designation is not fully clear yet.”*

*~“It is not recognized or valued by the Canadian federal government or other provincial bodies in Canada, and since they are the main clients domestically, this is a big limitation. It makes no difference or not if you have it or not in the market.”*

#### **4.4.4. Additional Outcomes**

Participants also identified additional impacts on the field that they had witnessed and that they believed were a result of the CE designation. Members of the CES board reported several positive effects, including an increase in professional development and training, increased identification as an evaluator, and the establishment of field standards.

Almost all CB members who were interviewed experienced positive effects as a result of serving on the CB. In general, there were two major themes regarding positive effects: (a) personal professional development and education and (b) interacting with other CB members. Several CB members noted that reviewing applications introduced them to new trends in evaluation, pushed them to continue their education, and encouraged them to stay on top of developing their skills.

For the most part, employers and commissioners felt positive about the contributions that CEs had made to their workplace. For example, one respondent indicated that a colleague (who has a CE) had greater access to a “*network of learning*,” that afforded more sharing of knowledge. Other respondents felt that having a CE as part of their organization contributed to quality and credibility because the CE had been assessed as meeting recognized standards. Some

respondents suggested that having a CE designation may help private sector firms to secure projects because some RFPs include it as an asset.

A couple of respondents believed that the CE had increased international recognition for CES and evaluation in Canada. Some respondents felt that it was too early in the program to suggest effects of the CE designation.

Generally speaking, relatively few interviewees described negative changes they had witnessed in the field of evaluation related to the CE designation. A few individuals from several stakeholder groups, however, raised concerns about creating an environment with an in-group/out-group mentality. Other concerns that were brought up by evaluation participants included a strong focus on the government context, the perception of the CE as a way for the CES to bring in additional revenue, or something that might hinder employment opportunities for non-credentialed evaluators.

*~“It’s created a group that’s “them” and “us,” and I don’t think that’s positive. I’m concerned that it has created a rift in the Canadian Evaluation Society....I always get concerned about the gatekeeper behavior, you know? Those who are admitted to our group and those who aren’t, and those who get in and those who [do not].”*

*~“Be aware that there might be competent evaluators who don’t want to be a CE, and that is OK. Don’t want to alienate [them] in the association or in their work.”*

#### **4.5. Sustainability and Growth**

In this section, we examine data useful for understanding the sustainability and potential for growth of the CE designation effort. We explored sustainability in four ways: (a)

understanding the extent to which individuals who have the CE designation are able to maintain the designation; (b) obtaining a general sense of the demand for the CE designation among evaluators in the near future; (c) acquiring information from CB members about their current level of effort in reviewing applications and their

perspective on whether it is feasible to review a larger number of applications; and (d) reviewing financial statements and reporting to better understand the financial viability of the program. In addition to increasing our collective understanding of the sustainability of the CE designation efforts, we also requested feedback from several stakeholder groups about opportunities for future growth of the program.

##### **Evaluation Questions**

- What features or aspects of the current program require additional attention to increase the likelihood that the PDP will be sustained and grow into the future based upon the experiences and perceptions of each stakeholder group?
- How financially viable/sustainable is this program?

##### **SUMMARY**

The sustainability of the CE designation is dependent upon a number of factors, whether evaluators who have already received the designation retain it, attracting more evaluators to apply for the designation, ensuring that the CB can maintain current levels of effort or higher, and ensuring that there is sufficient revenue to support anticipated expenses associated with the program. Individuals who have been through the maintenance process find it to be reasonable, but many new CEs require 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.	
Topic	Rating
4.5.1. Maintaining the CE designation	
Level of effort to maintain the CE designation	+
Quality of the maintenance process	+
Perceived level of effort to maintain the CE designation	+/-
Clarity regarding what is needed to maintain the CE designation	-
4.5.2. Future demand for the CE designation among evaluators	+/-
4.5.3. Sustainability of the CB	+
4.5.4. Financial viability of the program	+/-

#### ***4.5.1. Maintaining the CE Designation***

An important component of sustaining the CE designation effort is the ability of current CEs to maintain the designation. As a result, in the online survey we asked current CEs for information about several factors that indicate their ability to effectively engage in the maintenance process. Specifically, we asked them about the perceived level of effort to renew the CE designation and to rate their experiences going through the maintenance process.

Of the CEs who had completed the maintenance requirement, the majority indicated that the level of effort necessary to complete the process was acceptable ( $n = 70$ , 82%). Those who rated the level of effort as too high ( $n = 10$ , 11%) indicated that it could be difficult for some individuals, such as retirees and those living in more remote areas, to complete the necessary professional development requirements. CEs who had not yet completed the maintenance requirement anticipated the process requiring an acceptable level of effort ( $n = 59$ , 58%) or reported not knowing what level of effort it would entail ( $n = 32$ , 31%). Those who anticipated the effort would be too high ( $n = 9$ , 9%) often commented that they felt the maintenance requirements and options were poorly suited for consultants and instead targeted evaluators who work full-time for organizations.

The large majority of CEs who completed the maintenance/renewal process agreed with positive statements about the maintenance/renewal activities (Table 12). There was one exception to this pattern, however: an almost equivalent number of respondents agreed ( $n = 31$ , 37%) and disagreed ( $n = 29$ , 35%) that CES kept them informed about upcoming deadlines for professional development activities. In open-ended responses from CEs who disagreed with at least one statement, some noted that they were unaware if their maintenance information had been accepted because they had not received confirmation; others said they lived or worked in more remote locations and therefore found it difficult to access professional development at the appropriate level (e.g., intermediate or advanced offerings).

**Table 12. Ease and Clarity of the Maintenance Process**

Please indicate how much you agree or disagree with each of the following statements about the maintenance/renewal process.*	N	Agreement n (%)
<b>General Process</b>		
It is clear to me what information I need to submit to meet the maintenance/renewal requirements	89	63 (71)
The online record of learning activity is user-friendly	89	58 (65)
I am able to find someone at CES able to provide answers when I have questions	61	37 (61)
CES keeps me informed about my upcoming deadline for submitting professional development activities	83	31 (37)
<b>Professional Development</b>		
Completing the required professional development activities helps me to improve my skills as a professional evaluator	88	65 (74)
It is clear to me what qualifies as professional development	88	62 (70)
It is challenging to complete the 40 hours of professional development within the 3-year timeframe	88	20 (23)

\* Agreement corresponds to the selection of a 5, 6, or 7 on a 7-point scale, where 1 is “strongly disagree” and 7 is “strongly agree.”

Just over half of the survey respondents who received a CE designation noted that they had a clear understanding of what was required to maintain or renew it ( $n = 101$ , 53%). Several questions for clarification existed among those who reported that they were somewhat ( $n = 67$ , 35%) or not clear on the requirements ( $n = 23$ , 12%). These questions typically related to deadlines, procedures, or what qualifies as acceptable professional development (Table 13).

**Table 13. Common Questions about Maintaining/Renewing the CE Designation**

Deadlines	Procedures	Acceptable PD
<ul style="list-style-type: none"> <li>When is my renewal (and fee) due and when do I need to submit information?</li> <li>What are the timelines for submitting PD? Do I submit annually or once every 3 years?</li> <li>Are there sanctions for failure to properly track and submit activities by the deadline?</li> <li>What happens if I accidentally let my CES membership lapse? Do I need to start the CE process over?</li> </ul>	<ul style="list-style-type: none"> <li>How do I enter and submit my information online?</li> <li>Is there a way to track my credits as I obtain them (ongoing) instead of all at once so I am always aware of my status?</li> <li>Is my attendance at CES-related events automatically recorded as part of my maintenance requirement (e.g., conference attendance)?</li> <li>Do I need to submit proof or specific documentation to verify my PD activities?</li> </ul>	<ul style="list-style-type: none"> <li>What kinds of activities qualify for each category required for renewal?</li> <li>What type of non-CES events and activities qualify for the renewal requirement?</li> <li>What qualifies as self-learning? How do I provide proof of these activities?</li> </ul>

**Ratings:** *Mixed.*

**Rationale for ratings:**

- Areas of strength:* The level of effort to maintain the CE designation and the quality of the maintenance process are both viewed as areas of strength. This is

due to the large percentage of CEs who have been through the maintenance process and indicated an acceptable level of effort, as well as the large percentage of these individuals who agreed with positive statements about several key activities involved in the maintenance process.

- *Area with opportunity for improvement:* The perceived level of effort to maintain the CE designation was assigned this rating because there was some ambiguity among CEs who had yet to complete the process about the level of effort it would take. Additionally, slightly over half of these respondents (58%) noted that they anticipated the process would require an acceptable level of effort. Both of these statistics indicate room for improving perceptions regarding the level of effort, particularly in light of the experiences noted by those who had already done so.
- *Area of weakness:* Almost half (47%) of the survey respondents who had received the CE designation noted that they were somewhat or not clear on the requirements for maintaining it. Far too many questions exist among this target audience regarding the general procedures and rules associated with maintaining/renewing their designation.

#### **4.5.2. Future Demand for the CE Designation among Evaluators**

Evaluators (CES members and non-members) who had not applied for the CE designation were asked to identify their current plans with respect to applying in the future. Of 423 CES members who indicated that they had not yet submitted applications, 83 (20%) indicated that they planned to do so (Table 14). Of these 83, more than half indicated that they planned to submit applications within one year ( $n = 50$ , 60%; Table 15).

To apply for the CE designation, evaluators must be members of CES. Therefore, we asked non-CES members if they intended to join and, if so, whether they planned to submit applications for the CE designation. Almost one third of respondents indicated that they planned to join/rejoin CES ( $n = 95$ , 31%). Of these individuals, over three quarters ( $n = 75$ , 79%) noted that they planned to do so within one year (Table 15). One quarter ( $n = 24$ , 26%) indicated that they would apply for the CE designation (Table 14); most of these individuals said a main reason for joining CES was to apply for the CE designation ( $n = 17$ , 71%).

**Table 14. CES Member and Non-Member Intentions to Apply for CE Designation**

	<i>n (%)</i>
<b>CES Members (<math>N = 423</math>)</b>	
I am unsure of my plans with respect to the CE	131 (31)
I do not plan to submit an application for the CE	106 (25)
I may submit an application for the CE	103 (24)
I plan to submit an application for the CE	83 (20)
<b>Non-Members (<math>N = 94</math>)</b>	
I will apply for the CE designation after joining CES	24 (26)
I will not apply for the CE designation after joining CES	15 (16)
I don't know my plans for applying for the CE designation after joining CES	55 (59)



**Table 15. Anticipated Timeframe for Applying for CE Designation or Joining CES**

	<i>n (%)</i>
<b>CES Members (N = 83)—Plans to Apply for CE Designation</b>	
Less than 6 months	19 (23)
6 months to less than 1 year	31 (37)
1 year to 2 years	21 (25)
2 years to less than 3 years	7 (8)
3 years or more	3 (4)
Don't know	2 (2)
<b>Non-Members (N = 95)—Plans to Rejoin CES</b>	
Less than six months	51 (54)
6 months to less than 1 year	24 (25)
1 year to 2 years	11 (12)
2 years to less than 3 years	1 (1)
3 years or more	1 (1)
Don't know	7 (7)

**Rating:** *Area with opportunity for improvement.*

**Rationale for rating:** Slightly less than half (44%) of CES members noted that they either planned to submit or may submit an application for the CE designation. This is a relatively positive sign, as it represents 186 individuals just in our sample alone. Many individuals were invited to participate in the non-CES member survey (1,800), representing a large number of potential applicants should they elect to rejoin CES. Although approximately one third of the non-members who responded to the survey indicated they intended to join or rejoin CES, few ( $n = 24$ , 26%) said they would apply for the CE designation. We view non-members as a group that could be targeted to increase the pool of applicants and therefore see this as an area with opportunity for improvement.

#### **4.5.3. Sustainability of the Credentialing Board**

The evaluation team asked CB members if they believed that they could sustain the current level of time and effort that they spend reviewing applications and whether or not they felt as though they could commit more effort. Almost every CB member reported that they could at least sustain their current level of effort, and a few reported they would be able to take on more. A couple of members also noted that their ability to sustain or increase their level of effort was dependent upon their professional workload and number of contracts. When asked if the CB itself was sustainable, the majority of interviewees indicated that they believed it was.

While most members indicated that the CB was sustainable, several raised issues or concerns. A couple of members noted that the CB must be ready to find new members if and when more experienced members decide to leave the board. Others emphasized the importance of retaining members who can review applications in French.

**Rating:** *Area of strength.*

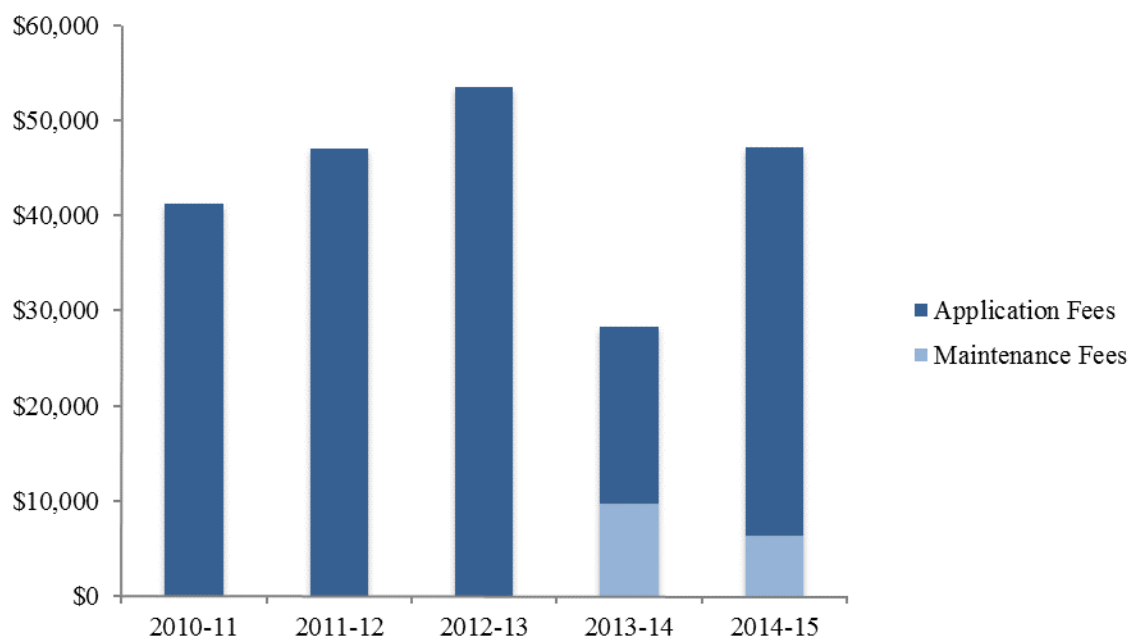
**Rationale for rating:** There were few to no indications in the interviews that the CB could not adequately sustain its current level of effort.

#### 4.5.4. Financial Viability

Another important indicator of the potential for sustaining the PDP relates to the program's financial viability. As a result, we examined several financial documents made available for the purpose of this evaluation.

**Revenue.** The PDP is funded by two sources of revenue: program application fees and annual maintenance fees. The latter of these two sources is acknowledged as a new type of ongoing membership. The one-time program application fee is \$485, and the annual maintenance fee is \$50 for CEs. Figure 10 provides a breakdown of PDP revenue by fee from 2010–2011 to 2014–2015.

**Figure 10. PDP Designation Program Revenue by Type of Fee**

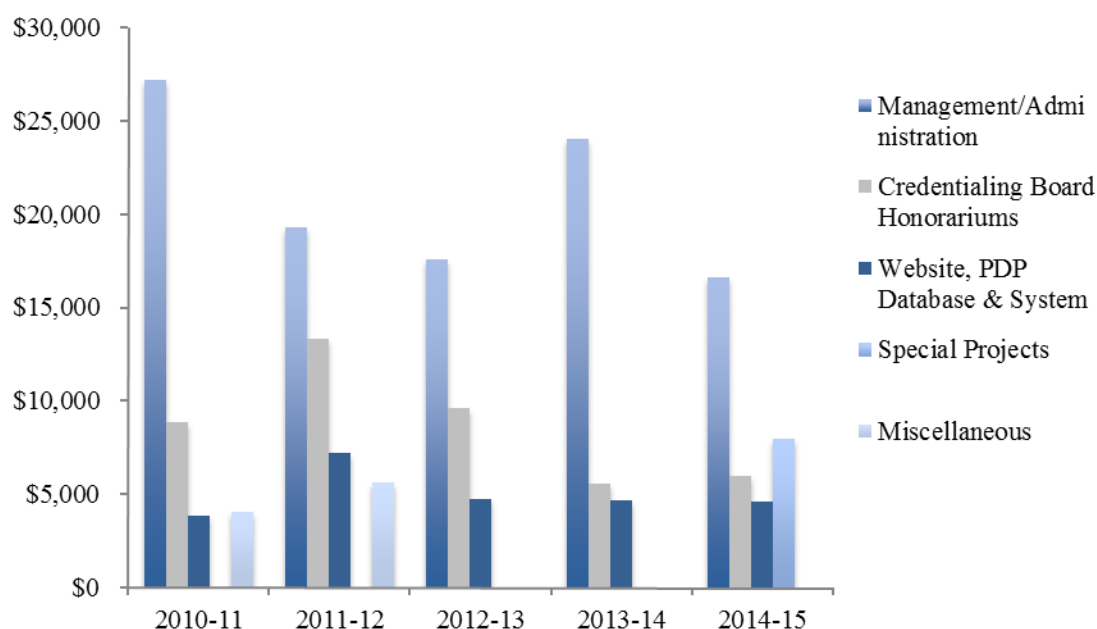


*Note.* Information was obtained from CES and the CES financial statements for the years ending June 30, 2012, June 30, 2013, and June 30, 2014. Financial information for 2014–2015 was estimated based on the best available data at the time of this report. Maintenance fees are absent in the first three years because they were not identified in the financial accounts, not because they were not received. Additionally, CES did not receive maintenance fees for some CEs until their 3-year time window had elapsed.

As indicated in the chart, application fees have accounted for the majority of PDP revenue to date. This is to be expected, as it is a new program in the process of ramping up CE designations.

**Expenses.** The primary cost driver for the PDP program is management and administration. Other expenses include CB honorariums and costs associated with the website, PDP database, and system. Figure 11 provides a breakdown of expenses from 2010–2011 to 2014–2015.

**Figure 11. PDP Program Expenses**



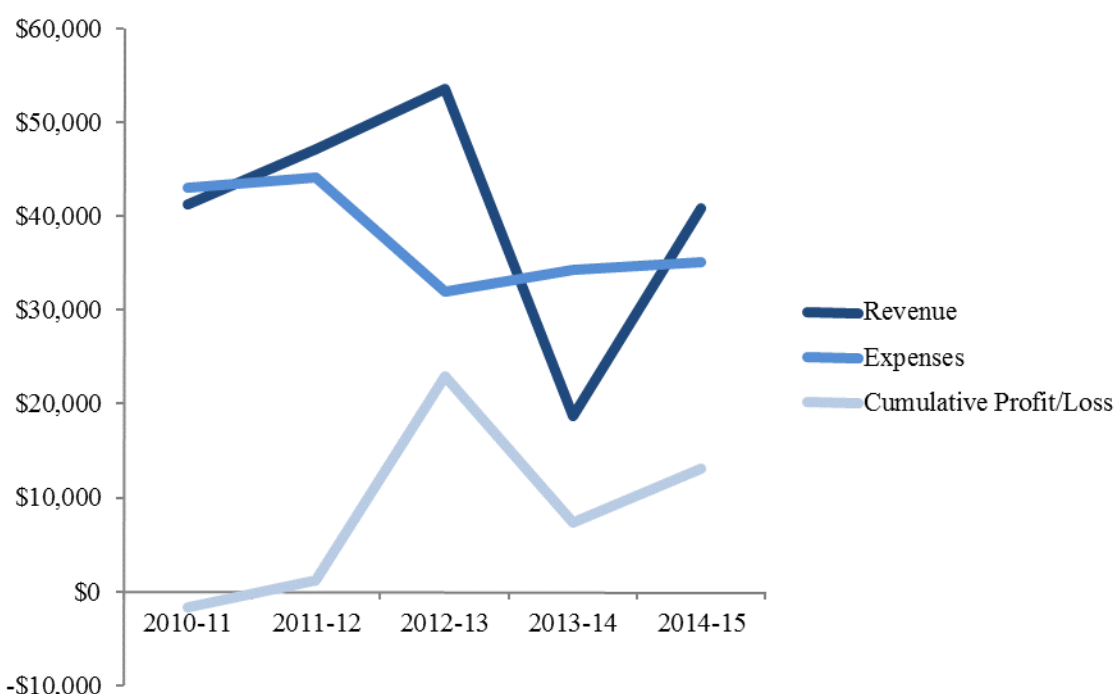
*Note:* Information about general program expenses was provided by CES. Financial information for 2014–2015 was estimated based on the best available data at the time of this report.

**Financial viability.** The *Proposal to CES National Council for a Professional Designation Program* (May 2009) projected an uptake of 20% of current CES members ( $1580 \times 0.2 = 316$  applications in year one) and an ongoing 20% level of interest in subsequent years ( $408 \times 0.2 = 82$  applications per year). The *2014–15 CES Annual Report* indicated that the CES credentialed 35 evaluators in 2010, which falls below the projected 20% uptake. Additionally, based on the costing formula included in the proposal, it would appear CES is achieving an estimated 10% increase per year.

The proposal indicates that, to be viable, the demand for the CE designation must exceed 10% of total CES membership. The *2014–15 CES Annual Report* indicated that the total CE membership is 287, which represents approximately 18% of CES's 1,569 members.

The proposal for the PDP also indicates that the CE designation program is intended to be cost-neutral to CES, in a steady financial state. As such, an additional measure of the viability of the CE program is an assessment of revenues versus expenses. Figure 12 shows revenue and expense trends over the last 5 years.

**Figure 12. CE Designation Program Revenue versus Expenses**



*Note.* Information was obtained from CES financial statements for the years ending June 30, 2012, June 30, 2013, and June 30, 2014. Financial information for 2014–2015 was estimated based on the best available data at the time of this report.

As indicated in Figure 12, there has been variability in cumulative profit/loss since 2010. On average, however, the program has achieved its goal of remaining cost neutral, and it appears to be carrying a small surplus.

**Future financial viability.** When considering the future financial viability of the PDP program, the evaluation team considered a number of indicators, including its capacity to sustain its revenue/expense ratio as well as external factors. The majority of the PDP’s annual expenses are funded by application fees, which are a one-time fee. Although this to be expected, given that this is a new program, the current fee structure assigns a sizeable revenue stream to application fees relative to maintenance fees. Consequently, even if the number of CEs increases over time, the impact of the additional maintenance fees will be modest. External factors that may influence financial viability in future years include, but are not limited to, overall expenses, prevailing economic conditions, the supply of new applicants, and the level of market demand for CEs.

**Rating:** *Area with opportunity for improvement.*

**Rationale for rating:** On average, the program has achieved its goal of remaining cost neutral, and it appears to be carrying a small surplus. The uptake of the designation appears to be below original projections. This, coupled with the small contribution of maintenance fees to the revenue stream and potential effects from external factors, indicate this is an area where improvements could be pursued.

#### **4.5.5. Potential Opportunities for Growth**

Another area of interest to the evaluation relates to opportunities for growing the CE designation. To examine this area of inquiry, we considered one specific rate limiter of the CE designation—CES membership. As previously stated, to apply for the CE designation an evaluator must be a member of CES. Therefore, we inquired with former members of CES as to why they opted not to continue membership. We also requested insights from interviewees about opportunities they were aware of (e.g., untapped resources, additional partnerships) that might be leveraged to help support the growth and sustainability of the PDP and CE designation.

**CES membership.** Approximately 95% ( $n = 301$ ) of respondents to the non-CES member survey reported having been CES members at one time. These individuals were asked to describe why they were no longer members of CES. They cited a number reasons, most commonly financial limitations, relevance to employment, and value of membership.

Many individuals stated that their employers did not pay for their membership and they were not able to afford it on their own. Several individuals indicated that their employers provided a limited number of resources to pay for membership each year, and the recipient of the benefit rotated. Others now found themselves in jobs that placed less of an emphasis on evaluation and membership was no longer relevant, while several noted that they let their memberships lapse due to relevance to their current employment.

Some lapsed members reported that they were not experiencing anticipated benefits of being CES members. Specifically, some noted that they did not believe membership gave them an advantage in the workplace. Others believed they could access the same resources that CES provided through other means.

Other reasons for lapsed memberships included initially joining only due to a conference, workshop, or course attendance; being on leave from work (e.g., maternity leave); living internationally; retiring; or forgetting to renew membership. It is important to note that a few respondents also cited the push for professionalization and the CE designation program as a reason for no longer being members.

**Partnership opportunities.** Interviewees frequently mentioned partnership opportunities that could be leveraged going forward to help grow and sustain the CE designation. Specifically, they mentioned the potential importance of building or expanding relationships with government, educators/universities, and international organizations.

Members of several stakeholders groups (i.e., CB, CES board, potential partners) indicated that they believed the strongest relationship or partnership for the PDP would be with the government of Canada. While participants mentioned various levels of government, forging a partnership with the federal government was most common. Several individuals suggested that support from the federal government would help to increase the credibility of and momentum for the PDP. Several interviewees also noted that the program would experience considerable growth if the federal government were to include the CE as a requirement for RFPs and job postings.

*~“If it was a requirement for federal evaluators to hold this it would be a huge opportunity for growth. There are approximately 400–500 evaluators working for the federal government. If it was a requirement of the position, then there would be some growth potential there. It is the same thing at the provincial and municipal levels as well.”*

Some interviewees suggested that the PDP consider strengthening its relationship with educators or universities. A handful indicated that besides the federal government, educators and universities could potentially have the biggest impact on the PDP. Specifically, interviewees suggested that educators and courses could align with the CES competencies to both train evaluators and promote the CE (and in several cases this was already occurring). Additionally, those from academic institutions suggested that there were opportunities to engage with CES around research in the field of evaluation—for example, partnering with evaluation practitioners in the act of research or conducting research related to the professionalization of the field. Additionally, interviewees specifically suggested that strengthening ties with the Consortium of Universities for Evaluation Education (CUEE) would be one way to collaborate with educators.

Some CB members suggested that working with other evaluation societies or international entities could help to ensure the sustainability of the program. While several seemed optimistic about collaborating with other societies, a few expressed some hesitation, worrying that the limited resources available would be focused outside of the country and CES membership.

*~“Someone who is knowledgeable about that could put together a plan and get support from international organizations with a similar interest and then themselves decide if they want one standard—unlikely—or a core set of standards that can be trailered to different places.”*

*~“The primary point is to focus on our community and our country and say, ‘how do we promote that?’ It seems that we’ve fallen short on that front. Not that one excludes the other, but if we have limited resources, I’d say let’s focus here.”*

**Marketing.** In addition to the partnerships listed above, interviewees across stakeholder groups also reported that increasing the visibility of and marketing the CE designation is essential for sustainability. Several individuals noted that they had not seen a lot of marketing efforts by the PDP or CES to promote the designation. They suggested that increased marketing and promotion would help recruit new CEs and new members to CES. While recognizing that resources were limited, and that marketing can be difficult for a voluntary organization, several members did suggest strategies for moving forward. Notably, several suggested highlighting successful and accomplished CEs to the membership and beyond.

*~“Good news stories about the benefits of the CE, or individuals who felt that their careers moved ahead faster or better because of the CE.”*

*~“There are some top notch evaluators. If I were the CES, I would market it!”*

## **5.0. Conclusions and Recommendations**

Overall, the evaluation findings suggest that the PDP is making strides in achieving several of the near-term intended outcomes of the CE designation articulated in the draft logic model (Appendix D). However, these achievements sit against a backdrop that indicates continued progress may be at risk. A limited number of individuals have sought the designation to date, many through the fast-track application process. Additionally, many evaluators have not applied for the CE designation because it is not required for their jobs, because the resources (time and money) required to apply are perceived as high, and because they are unclear about what the relative benefit of having the designation would be in relation to expending these resources. This evaluation suggests that if barriers associated with the cost and perceived level of burden of

applying were lifted—including by receiving financial support from the workplace to apply—the number of applicants may increase.

Individuals who have already received their CE designations often applied in an effort to increase their marketability or credibility—whether their own, their organization’s, or the field’s. Just over half of the CEs responding to the CES member survey reported that the value received from the credential was sufficient compared to the resources they expended to go through the process, although several said that it was just too early to tell. These findings and others contribute to a common theme that emerged throughout the evaluation—those who seek services from evaluators, whether by hiring or retaining internal evaluators or requesting assistance from external evaluators, at this point have not taken steps that provide strong enough external motivation for evaluators to pursue the CE designation. Understanding how to engage these “consumer” communities—and in particular how to put forth a value proposition statement to these audiences—is imperative.

Throughout this report we have pointed 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 tiers or specializations could enhance the value of the CE designation. For example, this might 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 the CES competencies and their organization’s 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.



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## Appendix A. Detailed Methodology

Our team structured the evaluation to take place in two phases—evaluation planning and evaluation implementation. The planning phase commenced in early June 2015 and concluded with the finalization of data collection instruments in August 2015. Key activities of the planning phase included engaging a steering committee to assist with developing a draft logic model of the CE process and intended outcomes, generating and refining key evaluation questions, and reviewing and providing extensive feedback on data collection instruments. This PDP Evaluation Steering Committee also reviewed and provided feedback on all aspects of the evaluation plan. Evaluation implementation efforts commenced immediately after the planning phase and included soliciting nominations for interviewees and recruiting participants, as well as collecting, analyzing, and synthesizing data. In the following sections we provide additional details about the methods employed.

### A. Evaluation Planning

In determining how to focus the inquiry, we took efforts to understand what information was likely to be most useful to the CES board in making decisions about how to improve the PDP in future years, which stakeholders were important (and perhaps even critical) to reach and influence in order to realize the intended outcomes of the PDP, and how to structure the evaluation so it was feasible to implement within a short timeframe.

When developing the evaluation plan, the evaluation team reviewed materials that described the CE designation process<sup>4</sup> and conducted a thematic analysis of the 2015 *Canadian Journal of Program Evaluation* special issue on the professionalization of evaluation in Canada.

Additionally, the CES vice president invited five individuals who held different types of roles in evaluation in Canada and beyond to serve with her as critical friends to the evaluation team on the PDP Evaluation Steering Committee.<sup>5</sup> We engaged this committee in asynchronous review processes at four discrete time points during the planning phase. During these reviews, the committee was asked to provide feedback on the following:

- Review 1: Evaluation purpose statement, logic model, and key evaluation questions
- Review 2: Draft evaluation plan (including revised logic model)
- Review 3: Data collection instruments—CES member survey

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<sup>4</sup> Examples include but are not limited to the CES policy on the CE designation, the PDP CE continuing education requirements, the CES PDP operations guidelines, and recently delivered presentations on the PDP and the CE designation specifically.

<sup>5</sup> Members of the PDP Evaluation Steering Committee included: Courtney Amo, CE, Director, Evaluation and Risk Directorate, Atlantic Canada Opportunities Agency; Gail Vallance Barrington, PhD, FCMC, CE, Vice President, Canadian Evaluation Society; Shelley Borys, PhD, CE, Chief Audit Executive and Director General, Evaluation, Office of Audit and Evaluation, Public Health Agency of Canada and Health Canada; Benoît Gauthier, CE, President, Canadian Evaluation Society; Jim McDavid, PhD, Professor, School of Public Administration, University of Victoria; Emma Williams, PhD, Associate Professor, Principal Scientist Evaluation for Northern Contexts, Northern Institute, Charles Darwin University

- Review 4: Data collection instruments—Non-CES member survey and interview guides

In addition to these asynchronous reviews by the PDP Evaluation Steering Committee, we sought feedback on a draft logic model from two individuals with extensive knowledge about the history of the PDP. The components of the logic model as well as the associated external factors and assumptions that underlie the model helped to guide us in identifying key evaluation questions and in developing the content of the data collection instruments. Due to the short timeline for this evaluation, we used the feedback from the steering committee and internal evaluation team to revise and improve the draft instruments.

Products of the planning phase included an evaluation plan and data collection instruments (i.e., surveys and semi-structured interview guides). Two translators assisted our team with translating communications to potential respondents (e.g., advance emails, invitations) as well as the survey content into French. Prior to implementing the evaluation, we submitted a package to Claremont Graduate University's Office of Sponsored Research (OSR). Following their review of this package, OSR certified the evaluation as exempt from Institutional Review Board coverage.

## B. Evaluation Implementation

Data collection efforts were developed with the intention of accomplishing the following aims:

1. Gain insights from audiences that had not been approached in previous evaluation efforts but play an important role in the success of the PDP;
2. Measure the perceptions of several audiences to develop a comprehensive picture of how the PDP is performing with respect to the five evaluation principles; and
3. Leverage patterns from existing data to target subgroups of evaluators to delve deeper into potential issue areas that may pose a risk to or present opportunities for improving program performance.

## Data Collection

The evaluation team collected data from several stakeholder groups identified through the logic modeling process as important to the success of the CE designation. These stakeholders included: (a) evaluators, (b) CES leadership and staff, (c) potential/prospective partners, (d) vocal critics, (e) evaluation commissioners, and (f) employers of evaluators. We collected data from these stakeholder groups via online surveys or semi-structured telephone interviews. We provide detailed descriptions of these data collection efforts in this section, and in Table A1 we summarize the link between each data source and the five evaluation principles our team was asked to examine.

**Table A1. Data Collection Strategies by Evaluation Principle**

	Relevance/ Utility	Efficiency	Effectiveness	Unintended Impacts	Sustainability
<b>Online Surveys</b>					
Evaluators					
CES Members	X	X	X	X	X
Lapsed/Non-CES Members	X		X	X	X
<b>Semi-structured Interviews</b>					
CES Leadership		X	X	X	X
Commissioners	X		X	X	X

	Relevance/ Utility	Efficiency	Effectiveness	Unintended Impacts	Sustainability
Employers	X		X	X	X
Potential/Prospective Partners	X		X	X	X
Vocal Critics	X		X	X	X
<b>Secondary Data</b>	X	X	X	X	X

**Online Surveys.** We distributed two online surveys to capture the perspectives of evaluators regarding the CE designation. One survey was designed for current CES members and the other was targeted to evaluators whose membership with CES had lapsed within the past 2 years or who never were CES members. The CES secretariat supplied our team with distribution lists for current CES members and lapsed members. We disseminated online surveys directly to all individuals on these lists who did not previously indicate to the CES that they would prefer not to be contacted for third-party research efforts.<sup>6</sup>

To reach evaluators who had never been CES members, we contacted CES chapter presidents via email for guidance in disseminating an online survey link to individuals who may have participated in professional development workshops or other chapter activities. Our team provided sample invitation language along with a survey link to CES chapter presidents or others identified by the CES chapter as an appropriate point of contact for soliciting non-member participation.

In an effort to improve the response rate among current and lapsed CES members, the CES president disseminated an advance email encouraging participation. Our team followed-up with an email invitation and a personalized survey link a few days after the advance email. As the survey deadline approached, the CES vice president used a Sunday email blast that is disseminated regularly to CES members to send a reminder with answers to frequently asked questions. In addition, our team disseminated up to two email reminders to individuals who had not yet completed a survey and extended the survey completion date by two days to further increase the response rate.

The online surveys were available to current and lapsed CES members for 16 days, although some participants (e.g., those who needed to switch surveys due to changes in membership status) had access to the surveys for 12 days. The non-CES member survey completion window varied depending upon when the chapter was able to disseminate or post the invitation.

**Semi-structured telephone interviews.** The evaluation team conducted semi-structured telephone interviews with five stakeholder groups: CES leadership, potential/prospective partners, vocal critics, commissioners of evaluations, and employers of evaluators. The methods we employed to identify interviewees and to solicit their participation are as follows:

- **CES Leadership:** This group included the CES Board of Directors, the Credentialing Board (CB), and the executive director. The CES president and vice president sit on the CES board as well as the CB and were therefore asked to provide insights on a select set

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<sup>6</sup> The list of CES members who originally fell into the “do not contact” category was reviewed by the CES president to ensure that all eligible parties were listed. After this review, an additional 475 surveys were disseminated to CES members.

of questions from each of these respective interview guides. We requested and received contact information for members of the CES board and CB from the executive director.

- **Potential/Prospective Partners:** This stakeholder group comprised several entities within Canada whose actions affect how evaluation is performed within the nation or who have the ability to promote or help grow the PDP, such as policymakers and educators. To identify potential interviewees, the evaluation team requested that each member of the PDP Evaluation Steering Committee provide names and contact information for 10 organizations in Canada they felt were most influential on the practice of evaluation in Canada. The evaluation team reviewed nine unique nominations and extended invitations to five representatives of organizations that were mentioned most frequently and whose work specifically related to Canadian evaluation practice. Additional nominations were requested from one interviewee who had particular expertise and insights into the training of evaluators in Canada; this sampling resulted in invitations to six additional individuals.
- **Vocal Critics:** This stakeholder group included individuals who had articulated, in public settings (through peer reviewed articles, conferences, or other forums), concerns about the CE designation at some point in time. To identify potential interviewees we requested that each PDP steering committee and former chairs of the CB provide names of 10 individuals who fell into this category. The evaluation team also examined recent literature to identify additional candidates. Of the 10 individuals nominated for interviews, six were extended invitations. In deciding whom to invite, we considered the frequency with which each individual was nominated. We also tried to maximize representation from individuals who held different professional roles, and attempted to minimize invitations to the same individual across interviewee groups.
- **Evaluation Commissioners:** This stakeholder group comprised institutions within Canada that requested evaluation services from external evaluators. To identify candidates to interview within this group we asked the members of the PDP Evaluation Steering Committee, CES chapter presidents,<sup>7</sup> and representatives of several consulting firms in Canada for the names of 10 entities that regularly requested evaluations. Specifically, we requested names and contact information for five entities that had and five entities that had not changed practices in a manner that recommended/requested services specifically from CEs. In prioritizing candidates to invite to interviews, we considered the criteria outlined in Table A2.
- **Employers of Evaluators:** The final stakeholder group from which interviews were requested comprised institutions throughout Canada that employ evaluators internally. To identify candidates in this stakeholder group, we asked steering committee members and CES chapter presidents for the names of up to 10 institutions that employed large numbers of evaluators within Canada. As part of our request we noted an interest in interviewing representatives of organizations that employed internal evaluators who served a variety of functions, such as evaluators who had planned and conducted evaluations as well as evaluators who had provided oversight/management of evaluations

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<sup>7</sup> The CES vice president sent an initial request for these nominations to CES chapter presidents to increase the likelihood of a response. The evaluation team principal investigator solicited nominations from the remaining groups.

or set evaluation policies. In prioritizing candidates to invite to interviews, we considered the criteria outlined in Table A2.

**Table A2. Criteria Considered for Selecting Commissioners and Employers**

Commissioners	Employers
<ul style="list-style-type: none"> <li>• Frequency with which they were nominated</li> <li>• Whether they changed practices or not (trying to get an even mix of yes and no, with a few unknowns included)</li> <li>• Cross-sector representation (federal government vs. other)</li> <li>• Mix of geography (particularly paying attention to including areas with low uptake of the CE)</li> <li>• Representation of institutions that focus on First Nations or Aboriginal populations.</li> <li>• Have we already spoken to one or more representatives of this group as part of another interview series? If so, we tried to not approach these individuals/groups again.</li> </ul>	<ul style="list-style-type: none"> <li>• Frequency with which they were nominated</li> <li>• Representation from high-uptake sectors (private firms) and medium/low-uptake sectors (government/nonprofits)</li> <li>• Geographic distribution</li> <li>• Representation of institutions that focus on First Nations or Aboriginal populations.</li> <li>• Have we already spoken to one or more representatives of this group as part of another interview series? If so, we tried to not approach these individuals/groups again.</li> </ul>

The means for facilitating participation from interviewees varied depending upon the audience of interest. To facilitate participation from CES leadership, the CES president and vice president disseminated an advance email encouraging participation from members of the CES board and the CB respectively. Other groups received an invitation from the principal investigator with an attached letter from the CES president and vice president encouraging participation. All telephone interviews were digitally recorded and subsequently transcribed. Interviews took place between August 27, 2015, and October 16, 2015, and typically lasted between 30 minutes and one hour.

**Secondary Data.** In addition to gathering primary data through online surveys and interviews, the evaluation team also requested several sources of secondary data from CES. We viewed these as an important source of information when responding to the question related to financial viability/sustainability and as a potential means for checking or corroborating insights garnered from the primary data. Table A3 includes sources of secondary data we reviewed in addition to information contained in the 2015 Canadian Journal of Program Evaluation Supplement on the CE designation.

**Table A3. Sources of Secondary Data**

<ul style="list-style-type: none"> <li>• Canadian Evaluation Society. (2007). An action plan for the Canadian Evaluation Society with respect to professional standards for evaluators. Retrieved from <a href="http://evaluationcanada.ca/txt/4_consortium_e.pdf">http://evaluationcanada.ca/txt/4_consortium_e.pdf</a></li> <li>• Canadian Evaluation Society. (2007). Response to the action plan. Retrieved from <a href="http://evaluationcanada.ca/txt/6_council_e.pdf">http://evaluationcanada.ca/txt/6_council_e.pdf</a></li> <li>• Canadian Evaluation Society. (2009). Competencies for Canadian evaluation</li> </ul>	<ul style="list-style-type: none"> <li>• Canadian Evaluation Society (2013). Financial statement June 30, 2013. Ottawa, ON.</li> <li>• Canadian Evaluation Society (2014). Financial statement June 30, 2014. Ottawa, ON.</li> <li>• Canadian Evaluation Society (2015). Professional Designations Program operations guidelines. Ottawa, ON.</li> <li>• Canadian Evaluation Society. (2015). Annual Report 2014-2015. Retrieved from <a href="http://evaluationcanada.ca/txt/annual_report_2014-2015.pdf">http://evaluationcanada.ca/txt/annual_report_2014-2015.pdf</a></li> </ul>
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<p>practice. Retrieved from <a href="http://evaluationcanada.ca/competencies-canadian-evaluators">http://evaluationcanada.ca/competencies-canadian-evaluators</a>.</p> <ul style="list-style-type: none"> <li>• Canadian Evaluation Society (2009). Costing analysis for credentialing project. Ottawa, ON.</li> <li>• Canadian Evaluation Society. (2010). Professional Designations Program, Credentialing Board terms of reference and guidelines. Ottawa, ON.</li> <li>• Canadian Evaluation Society (2011). Financial statement June 30, 2011. Ottawa, ON.</li> <li>• Canadian Evaluation Society (2012). Financial statement June 30, 2012. Ottawa, ON.</li> </ul>	<ul style="list-style-type: none"> <li>• Professional Designations Program Core Committee (2009). Proposal to CES National Council for a professional designations program. Ottawa, ON.</li> <li>• Professional Designations Program Core Committee (2009). Professional Designations Program Implementation Plan. Ottawa, ON.</li> <li>• Professional Designations Program (2014). Professional Designations Program 2014 financial information. Ottawa, ON.</li> <li>• Internal accounting data</li> <li>• 2014 CES Member survey data used in Gauthier, Kishchuk, Borys, and Roy (2015).</li> </ul>
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## Data Analysis

Given the timeframe for this evaluation, the evaluation team analyzed primary data sources by stakeholder group in parallel. The team developed an analysis plan that included suggestions for initial analyses of the online survey data and themes/questions to consider when performing qualitative analyses of interview data. Data from the online surveys were primarily analyzed using descriptive statistics; however, a few specific a priori hypotheses were developed as part of the analysis plan to explore through inferential statistics. The evaluation team identified themes from open-ended survey questions using emergent coding.

Individuals on the evaluation team who performed interviews began the initial stages of qualitative data analysis alongside the completion of each interview. Following each interview, the interviewer reviewed his or her notes and completed a contact summary sheet to reflect upon the main themes, salient points, or issues that arose during the course of that interview (Miles & Huberman, 1994). The main themes documented on the contact summary forms served as the initial codes in the codebook. After transcriptions were complete, the team coded interviews using these initial codes and others that emerged during the course of the coding process. All interviews and open-ended survey questions were coded using Atlas-ti software. Themes, not individual reports, were used to formulate the findings presented in this report.

## Appendix B. Additional Survey Respondent Characteristics

Variable	CES N (%)	Non-CES N (%)
<b>Location of workplace/study</b>		
Ottawa-Gatineau	160 (25)	82 (31)
Ontario (outside of Ottawa-Gatineau)	124 (20)	69 (26)
Alberta	75 (12)	19 (7)
British Columbia	66 (10)	11 (4)
Quebec (outside of Ottawa-Gatineau)	52 (8)	17 (6)
Other provinces & territories <sup>a</sup>	44 (6)	16 (6)
Elsewhere in the world	25 (4)	11 (4)
Saskatchewan	21 (3)	9 (3)
Nova Scotia	20 (3)	13 (5)
Manitoba	20 (3)	6 (2)
Prefer not to answer	20 (3)	4 (2)
United States	13 (2)	7 (3)
<b>Sector of current employment<sup>b</sup></b>		
Private sector/consultant	155 (25)	30 (11)
Not-for-profit sector	98 (16)	34 (13)
Federal public sector	91 (14)	74 (28)
Provincial public sector	90 (14)	46 (17)
Education sector	84 (13)	51 (19)
Other <sup>c</sup>	75 (12)	20 (7)
Municipal and regional public sectors <sup>d</sup>	39 (7)	10 (4)
<b>Years of FTE evaluation work in the last 10 years</b>		
Less than 1 year	59 (9)	17 (6)
1 year or more	550 (87)	229 (87)
Don't know	13 (2)	15 (6)
Prefer not to answer	11 (2)	3 (1)
<b>Percentage of time spent on evaluation during a typical week</b>		
0%	24 (4)	23 (8)
1–25%	125 (20)	81 (31)
26–50%	91 (14)	38 (14)
51–75%	100 (16)	31 (12)
76–99%	155 (25)	58 (22)
100%	111 (18)	22 (8)
Don't know	13 (2)	4 (2)
Prefer not to answer	15 (2)	8 (3)
<b>With regards to evaluation, would you say that you are primarily a...</b>		
User of evaluation results	37 (6)	28 (11)
Producer of evaluation results for your own organization	261 (41)	123 (46)
Producer of results for organizations other than your own	240 (38)	57 (21)
Researcher on evaluation	37 (6)	15 (6)
Other	45 (7)	35 (13)
Don't know	3 (1)	3 (1)
Prefer not to answer	10 (2)	5 (2)



Variable	CES N (%)	Non-CES N (%)
<b>Professional identity as it relates to evaluation</b>		
My primary professional identity is “evaluator”—I consider myself an evaluator, first and foremost	315 (50)	78 (29)
“Evaluator” is <u>not</u> my primary professional identity—I do evaluation work, but I do <u>not</u> identify as an evaluator, first and foremost	255 (40)	141 (53)
“Evaluator” is <u>not</u> my primary professional identity—I no longer do evaluation work	17 (3)	29 (11)
Other	39 (6)	14 (5)
Prefer not to answer	7 (1)	3 (1)
<b>Within 5 years likely to continue identifying primarily as “evaluator”</b>		
Yes, I plan to continue identifying as an evaluator, first and foremost	259 (82)	48 (62)
No, I plan on switching professions in the next 5 years	17 (5)	10 (13)
Don’t know	37 (12)	17 (22)
Prefer not to answer	2 (1)	3 (4)
<b>Do you currently hold a professional designation other than CE?</b>		
Yes	139 (22)	62 (23)
No	459 (73)	182 (69)
Don’t know	8 (1)	2 (1)
Prefer not to answer	25 (4)	20 (8)
<b>Highest degree completed</b>		
Bachelor’s	62 (10)	37 (14)
Master’s	399 (63)	153 (58)
Doctoral	154 (25)	65 (25)
Other university degree	15 (2)	6 (2)
Prefer not to answer	2 (1)	3 (1)
<b>Currently hold one or more certificates in evaluation?</b>		
Yes	120 (19)	71 (27)
No	483 (77)	181 (70)
Prefer not to answer	27 (4)	10 (4)
<b>Age group</b>		
Less than 30 years	38 (8)	9 (3)
30–39 years	143 (23)	64 (24)
40–49 years	166 (26)	70 (27)
50–59 years	146 (23)	69 (26)
60 or more years	115 (18)	46 (18)
Prefer not to answer	13 (2)	5 (2)
<b>Gender</b>		
Female	402 (64)	171 (65)
Male	214 (34)	88 (34)
Other	4 (1)	0 (0)
Prefer not to answer	11 (2)	1 (1)
<b>Income</b>		
< \$30,000	43 (7)	13 (5)
\$30,000 to <\$40,000	15 (2)	6 (2)
\$40,000 to <\$50,000	19 (3)	7 (3)
\$50,000 to <\$60,000	33 (5)	10 (4)
\$60,000 to <\$70,000	46 (7)	19 (7)
\$70,000 to <\$80,000	65 (10)	36 (14)
\$80,000 to <\$90,000	68 (11)	32 (12)

<b>Variable</b>	<b>CES N (%)</b>	<b>Non-CES N (%)</b>
\$90,000 to <\$100,000	53 (8)	29 (11)
\$100,000 to <\$110,000	55 (9)	23 (9)
\$110,000 to <\$120,000	31 (5)	17 (6)
\$120,000 to <\$130,000	19 (3)	11 (4)
\$130,000 to <\$140,000	10 (2)	2 (1)
\$140,000 to <\$150,000	9 (1)	4 (2)
\$150,000 or more	39 (6)	5 (2)
Don't know	2 (1)	2 (1)
Prefer not to answer	125 (20)	48 (18)

*Note.* Total percentages may not equal 100% due to rounding.

<sup>a</sup> Other provinces and territories include Newfoundland and Labrador, Prince Edward Island, New Brunswick, Yukon, Northwest Territories, and Nunavut.

<sup>b</sup> Respondents who were retired were asked to indicate previous employment sector.

<sup>c</sup> Other includes students and those who preferred not to answer, and selected "other," or indicated the question was not applicable.

<sup>d</sup> Includes both sub-national and sub-provincial.

## Appendix C. Summary of Nominations Received for Employers of Evaluators and Commissioners

<b>Employers</b>	<b>Commissioners</b>
Aboriginal Affairs and Northern Development Canada	Aboriginal Affairs and Northern Development Canada
Alberta Government—Health and Wellness	Agriculture and Agri-Food Canada
Alberta Government—Justice and Solicitor General	Alberta Centre for Child, Family, and Community Research
Alberta Health Services—Evaluation Services, Hospital & Health Care	Canada School of Public Service
Alberta Innovates Health Solutions	Canadian Cancer Society
Atlantic Canada Opportunities Agency	Canadian Dairy Commission
Banister Research and Consulting, Inc.	Canadian Food Inspection Agency
Canadian Dairy Commission	Canadian Human Rights Commission
Canadian Food Inspection Agency	Canadian Institutes of Health Research
Canadian Human Rights Commission	Canadian Partnership Against Cancer
Canadian Institutes of Health Research	Canadian Space Agency
Catalyst Research and Development Inc.	Cancer Care Ontario
Cathexis Consulting	City of Edmonton
City of Calgary—Family and Community Support Services	Communications Security Establishment
Communications Security Establishment	Department of Finance Organizational Structure
Department of Finance Organizational Structure	Department of Fisheries and Oceans
Department of Foreign Affairs, Trade, and Development	Department of Foreign Affairs, Trade and Development
Department of Fisheries & Oceans	Department of Social Development
Employment and Social Development Canada	Employment and Social Development Canada
Environment Canada	Environment Canada
Ference Weicker and Co.	Government of Alberta—Health Services
Goss Gilroy	Government of Alberta—Justice & Solicitor General
Health Canada & PHA	Government of NW Territories
Heritage Canada	Health Canada & PHA
Infrastructure Canada	Heritage Canada
Johnston Research	Infrastructure Canada
Library and Archives Canada	International Organization for Cooperation in Evaluation
Medical Training Centre in New Brunswick (CFMNB)	Justice Canada
Natural Resources Canada	Library and Archives Canada
Natural Sciences & Engineering Research Council of Canada	Natural Resources Canada
PMN Net	Natural Sciences and Engineering Research Council
PRA	New Brunswick Post-secondary Education, Training & Labor

<b>Employers</b>	<b>Commissioners</b>
Public Safety Canada	Ontario Trillium Foundation
R.A. Malatest & Associates	Provincial Government of Saskatchewan – Auditor’s office
SiMPACT Strategy Group	Public Safety Canada
Social Research and Demonstration Corporation	Public Works and Government Services Canada
Statistics Canada	REACH Edmonton
Stone Circle	Royal Canadian Mounted Police
Treasury Board of Canada Secretariat	Salvation Army—Regina
Transport Canada	Society for Safe and Caring Schools
United Way of Calgary	Toronto Atmospheric Fund
Universalialia	Transport Canada
University of Alberta	Treasury Board of Canada Secretariat
University of Regina	United Way
University of Saskatchewan	University of Alberta
Vector Research	Veterans Affairs Canada
Veterans Affairs Canada	
Generic: <ul style="list-style-type: none"> <li>• Canadian federal government offices in Saskatchewan</li> <li>• Provincial governments in NB, PEI, NFLD, and NS</li> <li>• Various ministry departments in Saskatchewan provincial government</li> </ul>	Generic: <ul style="list-style-type: none"> <li>• Informal network of provincial government evaluators (Nova Scotia)</li> <li>• Federal government departments/agencies</li> <li>• All departments and agencies in provinces and territories</li> <li>• Ontario government</li> </ul>

## **Appendix D. Draft Logic Model, Associated Assumptions, and External Factors**

In this section, we present our interpretation of the logic that underlies the PDP at the start of this evaluation. In developing this model we drew upon several existing documents and received feedback from individuals with extensive knowledge about the PDP background and design. Specifically, we leveraged information from two existing logic models: (a) an original accountability model that was part of the initial PDP approval package and (b) an outcomes logic model presented by Gauthier, Kishchuk, Borys, and Roy (2015). To help further articulate the key activities currently performed as part of the PDP, we drew upon information presented in the most recent version of the PDP operations guidelines. Following our review of these resources, we created an initial draft logic model and requested feedback from two individuals who had extensive knowledge about the history of the PDP as well as from members of the PDP Evaluation Steering Committee. The version presented here integrates this feedback based upon our understanding (Figure D1).

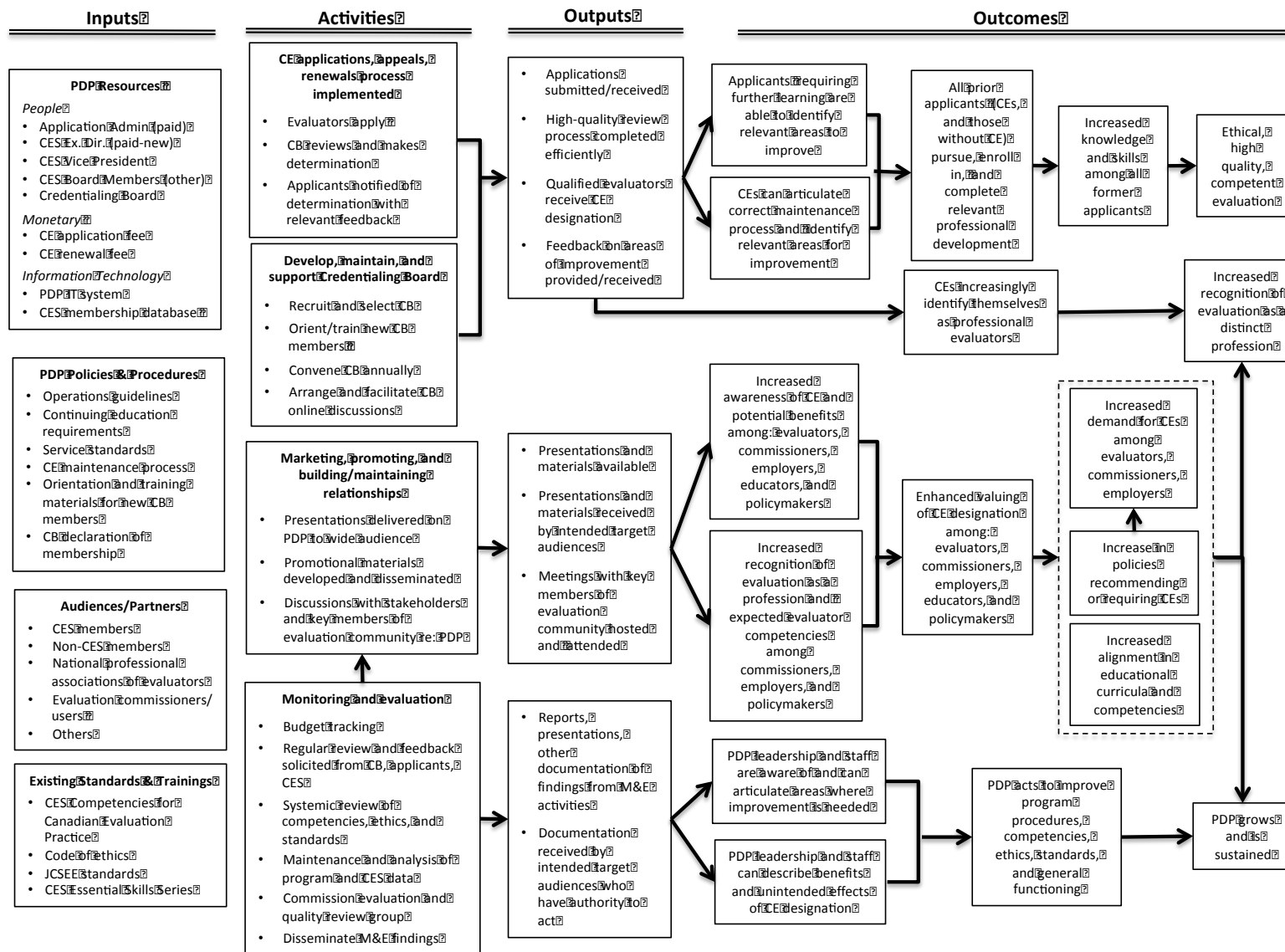
Developing this model helped our team to better understand not only the PDP activities and intended early outcomes but also the potential relationship between them. Additionally, as we learned more about the context of evaluation in Canada and the history of the PDP we began to unearth some factors that existed external to the PDP that may have affected CES's ability to fully implement the program and realize its intended outcomes. We depict these factors as "external factors" in Table D1. In addition, we highlight several assumptions of the PDP in Table D1. For the purpose of this evaluation, we defined assumptions as measurable factors that were not represented in the logic model, but that underlie the causal chains depicted. When assumptions are not actually in operation, this can adversely affect the program's ability to arrive at the intended outcomes (Treasury Board of Canada Secretariat, 2012). Both external factors and assumptions are important to the successful conduct of the PDP, and like the boxes and arrows presented in the logic model, were also available for investigation through the evaluation.

We do recognize that this model is limited in that it does not depict several anticipated outcomes of the PDP, namely those we anticipate will emerge after the program has been in place for several more years. For example, we do not integrate the protection of evaluation users or the ultimate goal of the professionalization of evaluation in Canada. Given the purpose of this evaluation—to focus on PDP processes and early outcomes—we instead truncated the causal chain and emphasized outcomes among intended target audiences that we would anticipate seeing at this stage of the program. For a full description of the intended outcomes of the PDP, we refer the reader to Gauthier et al. (2015).

After performing the formative evaluation we do see some areas of this logic model that could benefit from refinement. For example, the logic model could more thoroughly articulate the mechanism(s) through which having a CE designation results in higher-quality evaluations. It seems that an underlying assumption here is that the majority of evaluators in Canada who are qualified to receive the CE designation actually apply for and acquire it. If this is not the case, it seems that high-quality evaluation could be performed by both CEs and non-CEs. Additionally,

further consideration about the extent to which evaluators need to increasingly identify themselves as professional evaluators as a result of acquiring the CE designation in order to increase the recognition of evaluation as a distinct profession could be revisited.

Figure D1. PDP Logic Model with Focus on Early Intended Outcomes



**Table D1. External Factors and Assumptions**

<b><i>Assumptions</i></b>
<ul style="list-style-type: none"><li>• CE designation is viewed as relevant to and capable of addressing needs of evaluators and others who play important roles in the professional practice of evaluation (e.g., commissioners of evaluation, employers of evaluators, educators, policymakers)</li><li>• Evaluators and others who play important roles in the professional practice of evaluation (e.g., commissioners of evaluation, employers of evaluators, educators, policymakers) see the value of and desire professionalization of the field</li><li>• Most applicants are satisfied with the application and review process and view it as credible and fair</li><li>• Most CES members are satisfied with the PDP</li><li>• There is an existing/current demand for the CE designation</li><li>• Able to maintain high enough participation of Credentialing Board and sufficient PDP infrastructure to meet demand</li><li>• Actions taken to improve PDP processes are successful</li><li>• Means for acquiring the necessary qualifications to achieve the CE designation are available and feasible to obtain among evaluators who desire the designation</li><li>• Availability and accessibility of relevant training to support continuing education and maintenance of CE designation</li><li>• Desire for ongoing maintenance of CE designation over evaluators' career</li><li>• Sufficient pool of individuals who identify professionally as evaluators and stay in the profession</li><li>• Achievement and maintenance of a critical mass of CEs</li></ul>
<b><i>External Factors</i></b>
<ul style="list-style-type: none"><li>• Extent of alignment between CE designation requirements and other existing policies, procedures, or requirements with which practicing evaluators need to comply.</li><li>• Existing level of recognition among entities beyond CES that play an important role in the professional practice of evaluation and level of the need for and value of CES, the CE designation, and the professionalization of the field.</li><li>• Preexisting and strong professional allegiance of evaluators trained outside evaluation.</li><li>• Existence of self-sufficient evaluation subcultures.</li><li>• Fiscal austerity that is not conducive to professional development and staff support.</li></ul>



## Appendix E. Summary of Results Related to Assumptions

Assumptions at Risk		
Relevant Report Section(s)	Assumption	Comment
4.2	CE designation is viewed as relevant to and capable of addressing needs of evaluators and others who play important roles in the professional practice of evaluation (e.g., commissioners of evaluation, employers of evaluators, educators, policymakers).	
4.5.2	There is an existing/current demand for the CE designation.	
Assumptions Currently On-Target		
Relevant Report Section(s)	Assumption	Comment
4.1	Evaluators and others who play important roles in the professional practice of evaluation (e.g., commissioners of evaluation, employers of evaluators, educators, policymakers) see the value of and desire professionalization of the field.	
4.3.2	Most applicants are satisfied with the application and review process and view it as credible and fair.	
4.5.1	Availability and accessibility of relevant training to support continuing education and maintenance of CE designation.	Very few individuals who completed the maintenance process indicated that it was challenging to complete the 40-hour professional development (in 3 years) requirement.
Appendix B	Sufficient pool of individuals who identify professionally as evaluators and stay in the profession.	Although it is not entirely clear what would constitute “sufficient,” half of the individuals responding to the CES Member Survey indicated their primary professional identity was “evaluator” ( $n = 315$ , 50%). Of these, 82% ( $n = 259$ ) indicated that they planned to continue primarily identifying as evaluators in the next 5 years.

Insufficient Information Available from Evaluation to Test Assumption		
Relevant Report Section(s)	Assumption	Comment
NA	Able to maintain high enough participation of credentialing board and sufficient PDP infrastructure to meet demand.	It appears that it is possible to maintain a sufficient level of participation of the CB members (Section 4.5.3); however, we did not inquire about PDP infrastructure more broadly.
NA	Most CES members are satisfied with the PDP.	We did not inquire about the level of satisfaction with the PDP more generally, rather we specifically focused on the CE designation.
NA	Achievement and maintenance of a critical mass of CEs.	It is unclear what constitutes a “critical mass” of CEs.
NA	Means for acquiring the necessary qualifications to achieve the CE designation are available and feasible to obtain among evaluators who desire the designation.	We did not address this directly in the evaluation; however, the demographics of respondents indicate that several CES members (those who would be eligible to apply) have master’s-level training ( $n = 399$ , 63%; Appendix B) and 2 or more years of experience in evaluation ( $n = 514$ , 97%).
NA	Desire for ongoing maintenance of CE designation over evaluator’s career.	We did not inquire about this directly in the evaluation.