

--Town Hall Meeting--
CES Annual Conference
Winnipeg, June 5, 2007

Summary: CES Town Hall Session/Sommaire / Session interactive de la SCÉ

*Should CES Establish a System of Professional Designations?
If so, what would it look like?*

Panelists:

Jim Cullen, Chair, CES Membership Services Committee

Jim McDavid, Consortium contracted to fulfill the RFP

Frankie Jordan, President, CES

Brad Cousins, University of Ottawa

Sumbal Malik, University of Ottawa

Brigitte Maicher, CES-NB

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Prepared for Canadian Evaluation Society, National Council

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Authors' Note/Disclaimer: Each of the authors contributed to the preparation of this summary by taking field notes at the Town Hall Meeting and then contributing to this integrated document. The authors endeavoured to ensure accuracy through cross-check procedures. Any remaining misrepresentation of views and opinions of any of the speakers is purely unintentional and regrettable. Readers are encouraged to check the accuracy of content by listening to the audio recordings posted on the Canadian Evaluation Society website www.evaluationcanada.ca

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“This Town Hall session has as its explicit purpose to further stimulate debate and discussion among the CES membership about the issue of whether CES should develop and install a system of professional designation, and if so, what should be the essential characteristics and features of such a system. The session will begin with summary presentations of: 1) a tentative action plan developed by a consortium of prominent and leading members of the Canadian evaluation community in response to an RFP issued by CES National Council, 2) National Council’s published response to the action plan; and 3) an integration paper on subsequent consultations including web-based CES member deliberation. The bulk of the session will be devoted to CES member input from the floor. All relevant documentation is available on the CES website and summary documents will be made available at the session. CES will audio tape record the discussion portion of the session. The session will be supported by simultaneous translation and microphones will be made available to audience members.”

CES National Conference. (2007). Culture, community, and social justice in evaluation. [Brochure]. Canadian Evaluation Society.

Town Hall Discussion

1. Gunter Rochow

- Represents a small private consulting firm
- Expresses heartfelt gratitude to volunteers for work
- sees no conflict between minority report and action plan: “realistic and achievable” goals
- (need for CBK first) – need a bridge
- 2003 Conference – Gunter’s workshop on competency profiling (Dakum) – used by Government of Brazil and Brazilian Industrial Training Service – Ohio State University – across Canada
- This competency profiling system could be used as the basis for a CBK - each CES Chapter could do a piece of the work – estimated time frame between 3 and 6 months
- agrees that process “not only essential but urgent” given what’s going on presently
- Essential and urgent undertaking – can’t afford to do nothing or delay
- what is the role of CES? As a professional association, they must own and manage the process
- CES would be responsible for the process but educational institutions across the country can subscribe to what society works on to deliver programs

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- Training delivery – needs to be flexible and modern such as e-learning
e.g. Athabasca University's e-learning program

2. Greg Mason

- CES member since 1981
- “deeply troubled” by proposal
- two reasons for certification: 1) consumer protection; 2) barrier to entry
- CMC as an example has failed utterly (now folded into CAMC)
- CMC certified management consultant. That system has failed utterly – society could not sustain process – static numbers: members leaving at the same rate as they are coming
- what is the problem we are intending to improve?
- decline in quality of federal evaluation is more related to the conditions/constraints of commissioning not the quality of evaluators (no money, short timelines, interference of program stakeholders so that evaluators are not independent professionals)
- factors => inability of practitioners to perform their job. But government workers realize conspiracy against quality in government => not enough resources, commandeering of results, etc.
- certification can be desirable
- let's make sure we are going to be successful – if we fail, it will jeopardize the CES. “let us be very mindful of the cost of failure”
- under the right conditions, certification could happen - e.g. CBK, common way of testing, demand from consumer

Jim McDavid

(Response to Greg Mason)

- political issue – if CES doesn't take time/space to go through process now it will have no future leverage
- agrees that government resources are limited. but ‘chicken and egg problem’
- “if we don't take a stance, we won't have any leverage. No reason to believe that we can't make a difference”

3. Brad Gerhardt

- Provincial government
- not going to make any difference to our local practice
- essential to place the local organization
- we have to decide if we are going to move
- encourages National Council not to be timid and accept Consortium's recommendations.
- if that's not the view, then at least a compromise --interim step of credentialing

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before certification

- designation will not affect practice
- but necessary to “not get left behind”
- asks Council to not be timid and accept Consortium’s proposal – at a minimum, a compromise with commitment to certification in the future if start with credentialing

4. Gail Young

- CES-NCC President
- NCC Board and members are split
- personally, 100% behind certification – “CES, I’m begging you!”
- if CES doesn’t do it – it will get done to us by TBS – prefer to have CES working with TBS
- key constraint in federal government is finding qualified evaluators

5. Andy Rowe

- former President of CES Newfoundland chapter
- against designation - too many unanswered questions
- active in AEA, CES, and member for many years of CES
- too many unanswered questions poor analysis and no program theory to recognize the complexity of the issue – evaluation is very different from audit
- poor analogies...e.g. comparing evaluation to audit...audit is easy
- it’s not our job to make it easier for you to find evaluators
- there are many qualified evaluators/comp evaluators who will not apply to do provincial or federal work
- federal government does a poor job of recruiting nationally for evaluation services
- takes courage to stand up and go against pressure for designation
- which system is best? U.S. - system of academic training; Canada – practitioner-based
- we don’t have the evidence to guide us
- we don’t really know how to define it
- very complex and sophisticated world...dif from auditing and accounting
- we are not ready

6. Brian Evans

- director of evaluation and internal audit in government agency
- disagrees that evaluation is more complex than audit
- supports certification (look at psychology model)
- no short term solution – not going to solve the problem of finding qualified evaluators
- asks panel, what kind of timelines?

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Jim McDavid

(Response to question about timelines)

- should be about strategic thinking not tactics of timing
- 18 months is what he initially said to Bud Long
- estimate - draft CBK in 18 months + 18 months to roll out – let's say 3 years
- 3yrs to get CBK-and then decide if that is tied to credentialing? Go in parallel sequence?
- opportunities to get certificates, diplomas and degrees in evaluation
- Canadian CBK with various specializations

Frankie Jordan

(Response to question about timelines)

- triangle of time, quality, and costs are important for CES
- no decision made yet where going with this
- CES will make decision in next few months
- phased process
- pay attention and time on foundation

Brad Cousins

(Response to question about timelines)

- work already done on core competencies
 - CBK project by CES
 - Jean King et al (empirical approaches)
- Latched suggests we take what we have already and do a crosswalk
- necessary first step regardless of what system of professional designation to work towards
- 3 years is not unreasonable, who knows, could work quicker than imagined

7. Charles Lusthaus

- Universalis, private firm
- looked at proposals and had lots of discussions on this topic
- issue - whether or not evaluation professionals are seen as credible to senior managers – his own experience suggests evaluation field lacks credibility and is not used as often for decision-making as it should be – he conducted 5 meta evaluations – majority did not follow evaluation standards (i.e., list of evaluation questions)
- need a meta-evaluation of the meta-evaluations
- there is a competency problem in the field generally
- assumption: set of evaluators with core competencies would improve quality
- core competencies shift & change – there will not be consensus – need action

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research to track it over time

- fear of failure – biggest issue is not acting – use the 80/20 rule
- time is now to move

8. Rob Malatest

- Malatest Associates, evaluation company
- concerned about constraining supply of evaluators – how will new evaluators get credentialed
- how is this credential system going to reflect way evaluators are trained?
- entry level evaluators need something to work
- threatening issue for junior evaluators already being excluded
- discussion has to reflect different stakeholders involved
- need to have a membership vote
- certified market research professional – no benefit to him but “cash cow” for the organization (MRIA)
- practitioners and buyers of services may not benefit from this, or care for it

9. Alan Amey

- Public Health Agency
- 4 Key Factors:
 - 1 – TBS support for credentialing and certification
 - 2 – “shark effect” – if we don’t do it, the sharks will
 - 3 – days of cottage industry are over
 - 4 – national master standing offer in fed government
- supports Consortium’s proposal

10. Gerald Halpern

- Consortium member
- supports certification
- certification will make no personal difference to him but young people will be provided with a ladder of requirements
- if CES doesn’t do it, some other group will (reference to TBS and National Capital Chapter)
- what federal government does influences provincial governments and other segments
- not all members of evaluation teams have to be certified – one key person has to be certified to act as quality control
- don’t allow a search for perfection to destroy the good – we can have good evaluators

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11. Gail Barrington

- voice of independent evaluator for 22 years
- many clients exist, not only TBS but perspectives are heavily weighed towards TBS
- program theory is clear – more effective programs to benefit Canadians
- vision is too narrow. Need more of a global view
- explore international perspectives – recommend consulting the International Organization for Cooperation in Evaluation and ensure a response is provided
- support general direction with the details to be worked out

12. François Dumaine

- CES-NCC
- have to be careful about general statements e.g. status quo
- status quo is never an option in a professional agency
- we need to constantly do things to prove it is worth being a member of CES
- we will not control who will call themselves evaluators
- what we are saying is that we want to give people an option if you want to use our services
- want to give an option for certification
- need to clearly demonstrate the benefits
- recruitment – doesn't buy the argument that a "ladder" is an incentive
- credibility is not something that can be promised – do good work and credibility will follow

13. Heather Buchanan

- CES-NCC
- Speaking as an independent
- support Consortium's recommendation to move forward
- I want to announce what I am – frames what I do
- not feeling threatened if it's not there
- may not benefit from it personally
- low risk to move ahead – CES will not lose credibility even if it fails – doesn't think we will lose membership – we may get more members
- some will or won't want to be certified or credentialed
- this should increase amount of professional development

14. Brigitte Buchard-Morris

- newer to field of evaluation
- risk in designation – barrier to access to field
- challenges liked because of diversity of consumers and practitioners

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- Real risk in professional designation in constraining people in the field. Discouraging recruits as opposed to encouraging them
- would like to retain diversity

15. Bud Long

- strongly in favour of professional designation but has reservations about particular form proposed by Consortium
- need strong advocacy program
- believes professional development and advocacy for profession are key things
- designation will require us to think through what good evaluation is
- threshold designation will require us to think about what quality evaluation is and being able to convince potential users of evaluation that evaluation is important and there are the people who can do it competently
- if we are concerned about professional development, it is useful to have an incentive for something that can take time – no dif than university degrees
- reservation: concern is purpose of design – to provide a confirmation that its holder has a certain level of a certain type of knowledge
- critical question is how refined does the CBK have to be to permit credible confirmation of knowledge
- What specifically do you need to know? -we need something in CBK so people know what it is they should know, available to users of evaluation to see as a means of indicating what an evaluation can do for them.
- encourages TBS and CES to work together
- plea to council would be “for goodness sakes, work together here”
- “let’s not be reinventing wheels separately”

16. Rita Gunn

- PRA partner
- opposed to certification
- question – what is the role of CES in evaluation independence? there is interference in the work evaluators are doing
- how do we guard our independence?

17. Clark Wilson

- Canada Housing Corporation
- support Consortium’s proposal
- in response to Greg Mason: although fed government is informed purchaser of evaluation services; not-for-profit sector needs some “consumer protection” that certification would offer
- non profit sector is growing – a plus for certification role

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- exploitation and under-resourcing of evaluation issue
- issue of difference of training between Canada and the U.S.
- in response to Andy Rowe: U.S. has de facto credentialing system b/c have a Masters or PhD in evaluation
- in response to Rob Malatest: Consortium proposal does deal with supply issue

18. Keiko Kuji-Shikitani

- Ontario chapter board member
- supports certification
- defines herself as a program evaluator - a profession needs to have its members define themselves as evaluators
- for advocacy purposes need to define benefits of evaluation
- A profession must evolve to continue
- her students on Queen's online program ask about certification
- importance of defining oneself

19. Martha McGuire

- National Council
- no harm in certification – lots of benefits
- take practical approach
- do it in a way that allows diverse people to come into the field if we are to serve the public interest
- must consider whole spectrum of consumers
- “feds are sophisticated and big but don't know if we have to look to them as main consumer”
- CES could serve both the profession and the public interest

20. Hallie Preskill

- President of AEA
- AEA have not gone thru a process like CES is doing
- evaluators in US getting trained
- decline in university programs. 5200 members
- grow 20% year from practitioners
- people who are told they have to evaluation work
- 40-50 % of conference attendees are new
- most are not coming from academic programs
- multi-disciplinary backgrounds
- increasing number of professional development opportunities. –there are many. (certificates from workshops)
- declining grad programs

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(Remarks from panelists)

Jim Cullen

- SQEP colleagues had day long discussion
- realizes now that indeed this issue is current in European associations

Brad Cousins

- in favour of some kind of system of professional designation
- skeptical of exam-based as a long term goal
- drawn to credentialing as a first step and leave door open for certification down the road
- not impressed with quality of evaluations – need standards of practice
- accidental evaluators at least have to go through some kind of graduate training
- need advanced level training
- an important distinction is certificate of participation (e.g., IPDET or Evaluator's Institute) vs. certificate of achievement
- need to have your work judged by somebody in order to get graduate degree
- opportunity for Canada to take global leadership
- CES, universities and government – 3 key partners -- need to work together
- work from ground up to construct something that everyone can use
- we have empirical research
- disappointed TBS plunging ahead without involving universities and the professional society partners
- TBS needs to engage CES and universities as active partners not just advisors
- build on existing competencies that are empirically-based

Frankie Jordan

- CES Council will consider this feedback
- support notion of true partnerships that Brad mentioned (CES, government, universities)
- not sufficient that our name is on a list

Jim McDavid

- urges Council to consider all consultation that has taken place
- imagine a CES that is committed to a mature evaluation profession
- if we don't move expeditiously, we won't have opportunity in future
- suggests that TBS may not be taking CES seriously – need to go ahead regardless
- glad not taking a straw vote
- will look for guidance from CES for the future