Survey on Evaluation Training Needs and Preferences

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This material may be freely cited, as follows:
Outline

- Study objectives and methodology
- Demand for training by topic
- Preferences for training modalities
- Preferred chapter activities
- Key qualitative messages
- Conclusions and questions
- Exchange and implications
Study objectives and methodology

What we did

- **Objectives**
  - inform CES chapters and National of member needs and preferences regarding training
  - in particular, advanced training as a follow-up to ESS
  - better understand the training landscape for evaluators

- **Population:** 1827 CES members, no sample

- **Questionnaire based on**
  - 2010 CES-NCC study of member needs
  - 2005 Survey of Evaluation Practice and Issues in Canada

- **Fieldwork**
  - from April 15, 2013 to May 22, 2013
  - 764 completed questionnaires, 42%
  - data weighted by chapter
Study objectives and methodology

Profile of the sample of 764 respondents
Demand for training

Much interest, in many topics

% of interest for various topics (n = 763)

- Cost analyses: 21% Introductory, 38% Intermediate, 27% Advanced
- Theories and models: 9% Introductory, 38% Intermediate, 38% Advanced
- Rapid assessment methods: 22% Introductory, 32% Intermediate, 24% Advanced
- Qualitative data analysis: 7% Introductory, 32% Intermediate, 38% Advanced
- Performance measurement systems: 13% Introductory, 29% Intermediate, 35% Advanced
- Data trustworthiness: 12% Introductory, 38% Intermediate, 30% Advanced
- Combined analysis/triangulation: 12% Introductory, 33% Intermediate, 28% Advanced
- Evaluability assessment: 16% Introductory, 34% Intermediate, 25% Advanced
- Program theory and LM: 5% Introductory, 29% Intermediate, 39% Advanced
- Quantitative data analysis: 10% Introductory, 34% Intermediate, 39% Advanced
- Evaluation planning: 11% Introductory, 30% Intermediate, 39% Advanced
- Communicating results: 6% Introductory, 25% Intermediate, 39% Advanced
- Surveys: 6% Introductory, 25% Intermediate, 34% Advanced
- Case studies: 11% Introductory, 29% Intermediate, 39% Advanced
- Evaluation context: 9% Introductory, 29% Intermediate, 38% Advanced
- In-depth interviews, FG: 9% Introductory, 25% Intermediate, 32% Advanced
- Research design: 14% Introductory, 26% Intermediate, 25% Advanced
- Standards and ethics: 15% Introductory, 26% Intermediate, 21% Advanced
- Secondary data sources: 12% Introductory, 28% Intermediate, 21% Advanced
- Document and literature reviews: 9% Introductory, 28% Intermediate, 23% Advanced
- Project management: 10% Introductory, 28% Intermediate, 23% Advanced
- Developing consulting skills: 14% Introductory, 22% Intermediate, 20% Advanced
- Developing and using people skills: 7% Introductory, 21% Intermediate, 22% Advanced

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Demand for training

**Several topics are of no interest to many**

- For several topics, the most frequent choice was ‘no interest in attending’ (employees) and ‘no need to send staff on training’ (supervisors):
  - People skills (45% of employees had no interest, 45% of supervisors said there was no need)
  - Consulting (40%, 54%)
  - Project management (38%, 40%)
  - Systematic document/literature review (36%, 34%)
  - Standards and ethics (33%, 38%)
  - Secondary data (33%, 31%)
  - Research design (28%, 37%)
  - Understanding evaluation context (28%, 27%)

**Issue:** Are employees that seasoned already?
Demand for training

*Very little interest in introductory training*

- Introductory level training tended to not be selected frequently by respondents as of interest for themselves
  - 5 to 15% interest for most
  - Some interest in introductory training in rapid assessment (22% overall, 26% for employees) and efficiency, cost-effectiveness and cost-benefit analysis (21% overall, 27% for employees)

- Two areas, however, where supervisors felt the greatest need was for introductory level training for their staff:
  - Evaluability assessment (30%, although another 28% felt there was no need)
  - Efficiency, cost-effectiveness and cost-benefit analysis (35%, although another 34% felt there was a need for intermediate level training)

- Across most topics, supervisors tended to see a greater need for introductory training than did employees (from 15% to 35% for supervisors vs. from 7% to 27% for employees)
Demand for training
More interest in intermediate/advanced levels

- For most areas, both self-reported interest by employees in attending and supervisor interest in sending staff was highest for intermediate level training (from 30% to 45% for employees and 29% to 46% for supervisors):
  - Context (theories and models; program theory and logic models; evaluation context)
  - Design (evaluation planning)
  - Methodologies (systematic doc/lit review; rapid assessment; secondary data; interviews/focus groups; case studies; surveys)
  - Analysis (reliability/validity; qualitative analysis; quantitative analysis; efficiency / cost-effectiveness / cost-benefit analysis; triangulation)
  - Performance measurement systems
Demand for training

Some disconnect between employees and supervisors

- Although overall there was interest in advanced training, this level was not selected most frequently for any topic by supervisors for their staff.

- Self-reported interest of employees was fairly evenly split between intermediate and advanced training while supervisors more likely to feel need is only at an intermediate level.

![Bar chart showing% stating a need for advanced training](chart.png)
Demand for training
Responding to interest in intermediate/advanced

- Factor analysis reveals five clusters of topics where there is interest in intermediate / advanced training

<table>
<thead>
<tr>
<th>Issue: Does this provide a framework for potential development of training options?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interested in at least one topic at the intermediate/advanced level in the bundle</td>
</tr>
<tr>
<td>(n = 763)</td>
</tr>
<tr>
<td>Data analysis</td>
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<tr>
<td>Evaluation management</td>
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<tr>
<td>Qualitative data collection</td>
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<tr>
<td>Reflective practice</td>
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<tr>
<td>Economic and economical evaluation</td>
</tr>
</tbody>
</table>
Demand for training

Emerging issues

- Are there really three levels of training?
  - do people distinguish intermediate and advanced?
  - what does advanced mean?
- Why is there so much interest in evaluation theories and models?
- Why is there less interest in evaluation management training?
  - consulting, project management, people skills, standards and ethics, evaluation context
- Do supervisors underestimate training needs? Do employees overestimate their current level?
- Is advanced training simply not a job requirement?
Demand for training

CE designation

- CE designation program "through its maintenance and renewal requirements, promotes continuous learning within our evaluation community"
  

- Study allowed a look at how needs and preferences for PD differ between respondents with varying levels of engagement in the designation.
Demand for training
CE designation

- Interest in advanced levels of training higher among CEs, followed by those in process and interested
- But: CEs are the least interested in the course topics proposed

Issue: Is the lower level of interest of CEs a problem? What can CES do to help CEs meet training hours requirement?
Demand for training

CE aspirants

- **Level of interest in PD**
  - *high* among respondents not interested in the credential
  - *highest* among respondents interested in the credential but not yet initiated it (CE aspirants)

- **CE aspirants**
  - Less experienced: 10% have 16+ years’ experience (vs. 47% CEs)
  - Somewhat involved in evaluation: 62% spend more than half their time on evaluation (vs. 84% of CEs)
  - Work in non-federal public (25%), NFP and teaching (31%) sectors; less likely than CEs to be in private sector (16% vs. 37%)
  - Possibly a group less likely to have access to PD through work?
Demand for training
Emerging issues

- Who are the target markets for PD, and how to balance among them?
  - CEs: how to contribute to continuous learning for credential maintenance, when CEs want advanced training but least interested in topics overall?
  - CE aspirants: most interested group, may help them move into the credential?
  - Those not interested in the CE: they state rather high interest in PD nonetheless?
Preferences for training modalities

Interest in an advanced training series

- Overall, significant interest among members: 64%
- About three-quarters of members with less than 7 years of experience are interested
- Even seasoned evaluators express interest (41%)
- Highest interest among federal government evaluators, followed by non-profit sector/other sectors (70% +)
- Lowest interest is among private sector (51%)

<table>
<thead>
<tr>
<th>% interested in advanced course offered by CES 48.5 on a 5-point scale (n=144-742)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Everyone</td>
</tr>
<tr>
<td>0-3 years of experience</td>
</tr>
<tr>
<td>4-7 years</td>
</tr>
<tr>
<td>8-15 years</td>
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<tr>
<td>16+ years</td>
</tr>
<tr>
<td>Private sector</td>
</tr>
<tr>
<td>Mun./Reg./Prov.</td>
</tr>
<tr>
<td>Federal</td>
</tr>
<tr>
<td>NFP/Post-sec/Other</td>
</tr>
</tbody>
</table>

Issue: Is it possible to meet the needs of such a diverse group? Consequences for content?
Preferences for training modalities

Duration of an advanced series

- Highest interest for a course of 2 days (47%) if consecutive
- 3 days or more: 28% interested
- Much lower interest for 4 days (8%) (current length of full ESS)
- Longer series more palatable if sessions one week apart
- Private sector less likely to enrol in a series
- Federal sector more amenable to longer series

Issue: What to focus on if only two days?
Preferences for training modalities

Mode of delivery

- Mix of online and classroom preferred option (47%)
- About one-third prefer classroom only
- On-line only preference for 19% of respondents
- Federal sector less on-line (9%), more classroom (40%)
- 0-3 years in evaluation, more classroom (38%)

Issue: Is this a solution to 2-day availability for classroom? What can be done online?
Preferences for training modalities

**Final exam**

- Half of the evaluators agree that there should be some kind of exam (50%).
- Only 34% are opposed
- Interest highest among those interested in obtaining CE (69%) (not shown)

Issue: Should it be a classroom or take-home exam?
Preferences for training modalities

Capacity to pay per day - classroom

- When asked an open-ended question on price, most popular price range was $400 or more (36%)
- Wide range
  - federal public servants willing to “pay” more than others (61% for $400+)
  - non-profit much lower (28% for same price)
- Many don’t know or were not interested

Issue: Is this realistic? What does this involve?
Preferences for training modalities

*Capacity to pay per day – on-line*

- When asked an open-ended question on price, many members willing to pay more than $200 for advanced course on-line (47%)
- Private sector most likely to be willing to pay more (59% willing to pay $200+)

**Issue:** What about mix of online and classroom?
Preferences for training modalities

Emerging issues

- How can such diverse needs be met?
- What should be the focus of a 2-day series? a 3-day series? a 4-day series?
- What would a mix of on-line and classroom training look like?
- Is it feasible to develop exams? What type of exam?
Preferred chapter activities

Variety and substance

- Emphasis CES should put on various modes of delivery
- Preference goes to Web-based delivery and substantial events
- Federal employees: more breakfast, less Web events & tele/video conferences
- Mun/Reg/Prov employees: less breakfast, more multi-day conferences
- On CE track: more multi-day conferences, segmented long Web events, teleconferences, paper-published
- CEs: more breakfast, half-day

Issue: can CES support the offering of events on a variety of platforms?
Key qualitative messages

Barriers and enablers

- **Five key themes emerged from the comments**
  - There is significant *interest* in intermediate and advanced training.
  - *Cost* is an important issue.
  - *Geography* is a barrier.
  - *On-line* professional development is a key solution.
  - Advanced training must be *flexible*, multimodal, interactive, and collaborative.

- **These themes are not independent from one another.**

**Issue:** Are CES chapters the right players to produce and deliver advanced training?
Conclusions and questions

1. How should CES meet the need for advanced training?
   • What is the difference, if any, between intermediate and advanced training?
   • Should advanced PD development efforts focus on individual workshops or on integrated series?
   • What is the optimal model integrating on-line and face-to-face training, and exams?
   • If an advanced evaluation course series was offered in a 2-day classroom format, with some on-line content, what would be the focus of this series?

2. What are the respective roles of CES and other potential training suppliers?

3. Is formal training the preferred way for CES to support the CE designation maintenance requirements? What else?

4. How should CES establish priorities among training topics in its PD development efforts?
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# Survey on Evaluation Training Needs and Preferences, 2013

*Interest in 23 topics at 3 levels (n=763)*

## Levels of Training

- **Introductory**: focuses on basic concepts and generic techniques
- **Intermediate**: provides in-depth information and hands-on learning
- **Advanced**: covers challenging topics and focuses on discussion among informed parties
- **Not interested**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Introductory</th>
<th>Intermediate</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost analyses</td>
<td>21%</td>
<td>38%</td>
<td>27%</td>
</tr>
<tr>
<td>Theories and models</td>
<td>9%</td>
<td>38%</td>
<td>38%</td>
</tr>
<tr>
<td>Rapid assessment method</td>
<td>22%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Qualitative data analysis</td>
<td>7%</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Performance measurement systems</td>
<td>13%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Data truthworthiness</td>
<td>12%</td>
<td>35%</td>
<td>20%</td>
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<tr>
<td>Combined analysis/triangulation</td>
<td>12%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Evaluability assessment</td>
<td>16%</td>
<td>34%</td>
<td>19%</td>
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<tr>
<td>Program theory and LM</td>
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<td>25%</td>
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<tr>
<td>Communicating results</td>
<td>5%</td>
<td>31%</td>
<td>26%</td>
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<tr>
<td>Surveys</td>
<td>6%</td>
<td>29%</td>
<td>34%</td>
</tr>
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<td>Case studies</td>
<td>11%</td>
<td>29%</td>
<td>30%</td>
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<tr>
<td>Evaluation context</td>
<td>9%</td>
<td>29%</td>
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<tr>
<td>In-depth interviews, FG</td>
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<tr>
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<td>26%</td>
<td>30%</td>
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<tr>
<td>Standards and ethics</td>
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<td>12%</td>
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<tr>
<td>Document and lit reviews</td>
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</tr>
<tr>
<td>Developing and using people skills</td>
<td>7%</td>
<td>21%</td>
<td>45%</td>
</tr>
</tbody>
</table>
Survey on Evaluation Training Needs and Preferences, 2013

23 topics empirically fall within 5 clusters of interest

Data analysis
- Quantitative analysis
- Qualitative analysis
- Data trustworthiness
- Surveys
- Combined analysis/triangulation
- Research design

Evaluation management
- Consulting skills
- People skills
- Project management
- Communicating results
- Evaluation planning

Qualitative data collection
- Document and literature reviews
- Secondary data sources
- In-depth interviews, focus groups
- Case studies

Reflective practice
- Evaluation theories and models
- Program theory and logic models
- Standards and ethics
- Evaluation context

Economic/al evaluation
- Cost analyses
- Rapid assessment methodologies
- Evaluability assessment
- Performance measurement systems