The CES Professional Designations Program: Views from CES Members

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This material may be freely cited, as follows:
• **Purposes**
  - To document the characteristics of those who have and have not applied for and obtained the Credentialed Evaluator (CE) designation
  - To assess the extent to which intended and unintended outcomes of the Professional Designations Program (PDP) are occurring

• **Context**
  - After years of debate and preparation, PDP adopted by CES in May 2009
  - Launch in June 2010
  - 250 CEs, 80 in progress

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Outline

Foundation
- Logic model
- Methodology

Reach
- Who are the CEs?
- Reasons for not becoming a CE

Outcomes for...
- CEs
- non-CEs
- CES
- the profession
- the users / society

Next steps
- Conclusions
- Questions

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PROFESSIONAL DESIGNATION PROGRAM – OUTCOMES LOGIC MODEL
(elements in italics were not measured in this survey)

**Inputs, activities and outputs**

- **Canadian Evaluation Society**
  - Code of ethics; Evaluation standards; Applications
  - Application management; Systems management; Program adaptation; Promotion

- **Credentialed evaluators**
  - Recognition of the CE as holding a level of skill and quality/competence
  - Increased attention to and involvement in professional development
  - Higher costs

- **Non-credentialed evaluators**
  - Orientation of evaluators, particularly new ones, to competent practice
  - Restricted access to the profession
  - Reduced interest in professionalizing

- **Evaluation profession/discipline**
  - Expectation that all evaluators have basic knowledge
  - Increased continuous learning
  - Increasing/reduced training offerings in evaluation
  - Increased credibility of evaluation
  - Some unqualified individuals are credentialed

- **Users/Society**
  - Stakeholders view evaluation as a professional practice, understand its value
  - Clients aware of and prefer the credential
  - Protection of evaluation users
  - Avoidance of unethical behaviour
  - Needs of employers and purchasers for quality evaluation met
  - Society benefits from fair and accurate evaluations

**Immediate outcomes**

- Members satisfied with PDP
- Demand for and uptake of the designation
- Infrastructure supports demand
- Recognition of the CE as holding a level of skill and quality/competence
- Increased attention to and involvement in professional development
- Higher costs
- The field is clear on what it means to be an evaluator

**Intermediate outcomes**

- CE is a desirable designation
- CES explores other designations
- PDP is cost neutral
- Divisiveness within membership
- Increased competency
- Higher professional and competitive status
- Use of PDP competencies as a training and professional development framework
- Expectation that all evaluators have basic knowledge
- Increased continuous learning
- Increasing/reduced training offerings in evaluation
- Increased credibility of evaluation
- Some unqualified individuals are credentialed
- Stakeholders view evaluation as a professional practice, understand its value
- Clients aware of and prefer the credential
- Public is educated about good evaluation practice

**Long-term outcomes**

- External organizations support, promote and make use of the designation
- CES is a credible representative and promoter of evaluation
- Increased/sustained professional identification as an evaluator
- Enhanced distinct identity of evaluation on par with other fields
- Standardization and homogeneity in evaluation practice
- Higher quality evaluations
- Increased use of evaluation
- The credential as standards influences practice
- Field is narrowed
- Protection of evaluation users
- Avoidance of unethical behaviour
- Needs of employers and purchasers for quality evaluation met
- Society benefits from fair and accurate evaluations

**Ultimate goals**

- Professionalization of evaluation in Canada
- Clarity and definition for and within Canadian evaluation practice

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Methodology

- Questionnaire aligned to the logic model
- Pretest followed by adjustments and slashing
- Challenge group: balanced in favour and critical
- Population (no sample): members of CES
  - All members as of March 28, 2014: 1,889
- On-line administration from April 2 to 16, 2014
  - One invitation, two reminders
- 654 completed questionnaires (rr = 35%)
  - 159 Credentialed Evaluators (rr = 64%)
  - 495 non-credentialed evaluators (rr = 30%)
- Data weighted by CE status and chapter
- Simple percentages plus modelled differences

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Methodology

- Program outcomes were measured in two ways:
  - By comparing the responses of CEs and non-CEs
  - By asking CEs to self-assess the contribution of the designation to the outcomes

- Method: we asked about change over the previous 4 years
  - Expectation that the natural passage of time will see an increase in expected outcomes
  - But possibility that change is naturally more rapid early in one's career
  - Since CEs have more years of experience, expectation that the change over 4 years would be lower than that of non-CEs

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1. Who are the Credentialed Evaluators?

(n = 159)

- Private sector: 52%
- Mun./Reg./Prov. sector: 12%
- Federal sector: 14%
- Not-for-profit/Post-sec/Other: 22%

- Less than one year exp: 1%
- 1-5 years: 7%
- 6-10 years: 22%
- 11 or more years: 69%

- Less than 30 years old: 3%
- 30 to 39: 14%
- 40 to 49: 27%
- 50 to 59: 29%
- 60 or more: 27%

- Bachelor's: 6%
- Master's: 31%
- Doctorate: 62%

- Women: 31%
- Men: 32%

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1. Who are Credentialed Evaluators?

- More likely to work in the private sector
  - 52% vs. 19% of non-CEs
- More senior
  - More experienced (69% with 11+ years vs. 29% of non-CEs)
  - Older (56% are 50+ vs. 32% of non-CEs)
  - Higher income (47% make $100+k vs. 20% of non-CEs)
- More engagement with CES
  - Longer-term members (44% for 11+ years vs. 10% of non-CEs)
  - More who have volunteered for CES (67% vs. 22% of non-CEs)
- More likely to hold another designation
  - 30% vs. 22% of non-CEs
2. Reasons for not becoming a CE (% agree)

(Those not interested in the CE, n=113-181)

- I don’t see enough benefit for me: 72%
- It is not required in my job: 71%
- It is not recognized in my job environment: 60%
- It is too expensive: 54%
- The application process is too demanding: 53%
- I have no financial support from my employer: 52%
- I don’t have the time: 49%
- I am too uncertain of the result to invest in this process: 44%
- The designation maintenance requirements are too demanding: 40%
- It is not a credible designation: 32%
- I am not well informed about the professional designation: 29%
- I already hold another professional designation: 23%
- My employer has indicated that it is not worthwhile: 20%
- I don’t intend to make a career out of evaluation: 19%
- I don’t have enough experience in evaluation yet: 18%
- I am not involved enough in evaluation: 18%
- I am too close to retirement to care: 17%
- I expect to leave evaluation soon: 13%
- I don’t hold a post-graduate degree: 12%
- I don’t see myself as an evaluator: 11%
- CES is not a credible organization: 8%
2. Reasons for not becoming a CE

- Evaluators don’t see enough benefit
  - More experienced evaluators see less benefit
- It is not required, recognized or supported in the workplace
  - Federal public servants more likely to say employer indicates it is not worthwhile or credible
    - But no differences for other indicators of lack of support
- The application process is too difficult, too expensive and/or too time-consuming
  - Cost is less of an issue for private sector
  - Seen as equally demanding across sub-groups
- Non-federal government less involved or not experienced enough in evaluation
### 3. Outcomes for CEs

<table>
<thead>
<tr>
<th></th>
<th>Non-CEs (n≈462)</th>
<th>CEs (n≈159)</th>
<th>Attribution by CEs (n≈159)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IMMEDIATE</strong></td>
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<tr>
<td>The CES CE is a good way to identify individuals qualified to conduct evaluation.</td>
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<tr>
<td>Others have recognized me as being competent in evaluation</td>
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<td>Other evaluators have thought more highly of me as a professional evaluator</td>
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<td>My employer [...] have thought more highly of me as a professional evaluator</td>
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<tr>
<td>I participated in more professional development activities</td>
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<tr>
<td>I read more about evaluation</td>
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<td>I participated more in CES Annual Conferences</td>
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<td>I participated more in CES Chapter activities</td>
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<td>I participated more in evaluation conferences other than those of CES</td>
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<tr>
<td><strong>INTERMEDIATE</strong></td>
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<td>I improved my professional skills</td>
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<td>I expanded my knowledge about different approaches to evaluation</td>
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<tr>
<td>I expanded my knowledge about evaluation methods</td>
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<tr>
<td><strong>LONG TERM</strong></td>
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<tr>
<td>I defined myself more as a professional evaluator</td>
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<tr>
<td>I felt more that I belong to a recognized profession</td>
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<tr>
<td>I self-assessed my level of evaluation expertise</td>
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<tr>
<td>I ensured my practice aligns with CES evaluation competency expectations</td>
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<tr>
<td>My competitiveness in the job or contract market has improved</td>
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</tbody>
</table>
3. Outcomes for CEs

- CEs and non-CEs are equally likely to
  - Have been recognized as *competent*
  - Have *self-assessed* their practice and expertise
  - Have taken part in PD or *read* about evaluation
  - Have improved their *skills* in the past 4 years
  - Have participated in *conferences* and chapter activities
  - Have expanded their *knowledge* in the past 4 years
  - Feel that they are seen as *professionals*
  - Perceive that their *competitiveness* has improved
  - Self-*define* as a professional evaluator

- CEs are *more likely* than non-CEs to
  - Find that the CE is a *good way* to identify qualified individuals
  - Line up their practice to CES *competencies*
  - Feel part of a *recognized profession*
3. Outcomes for CEs

- Roughly one-half of CEs attribute change over the past 4 years to the designation, for example
  - Recognition of competence to the designation
  - Clarification of development needs
  - Increased professional development
  - Improved professional skills
  - Expansion of knowledge on evaluation
  - Enhanced professional status
  - Improved competitive position
  - Professional identification as evaluator

- Conclusion: outcomes for CEs
  - Comparative evidence of impacts on use of competencies and feeling of belonging to a recognized profession
  - Self-assessment suggests a much more profound contribution of the designation
4. Outcomes for Non-CEs: Orientation to Competent Practice

Over the last 4 years I paid more attention to:

- **Fundamental norms and values**
  - Non-CE (n=462): 40%
  - CE (n=159): 56%
  - Attribution by CEs (n=159): 61%

- **Technical aspects**
  - Non-CE (n=462): 36%
  - CE (n=159): 56%

- **Context**
  - Non-CE (n=462): 35%
  - CE (n=159): 60%

- **Managing an evaluation**
  - Non-CE (n=462): 28%
  - CE (n=159): 52%

- **People skills**
  - Non-CE (n=462): 33%
  - CE (n=159): 57%
  - Attribution by CEs (n=159): 67%
4. Outcomes for Non-CEs: Use of PDP Competencies

**CES Competencies for Canadian Evaluation Practice**

- **I have high knowledge of the competencies**
  - Non-CE (n≈412-485): 51%
  - CE (n≈156-159): 87%

- **The competencies are important to me**
  - Non-CE (n≈412-485): 55%
  - CE (n≈156-159): 75%

- **The competencies are good basis for the identification of training needs**
  - Non-CE (n≈412-485): 63%
  - CE (n≈156-159): 74%

- **The competencies define what an evaluator able to do**
  - Non-CE (n≈412-485): 45%
  - CE (n≈156-159): 63%
4. Outcomes for Non-CEs

- **CES Competencies for Canadian Evaluation Practice** resonate more for CEs
  - Going through process could be expected to raise awareness

- Over the last 4 years, however, non-CEs have paid more attention to some of the competency themes than CEs (technical aspects, context)
  - But higher than 50% for both groups
  - CE self-assessment indicates perceived modest impact of designation

- Non-CEs are more likely to feel that the designation has reduced access to evaluation contracts and positions for those without the designation
  - 30% of non-CEs vs. 16% of CEs
5. Outcomes for CES: Satisfaction

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5. Outcomes for CES: Satisfaction

- Satisfaction with the application process
  - Most satisfying: non-burdensome components like education and experience
  - Least satisfying:
    - computer systems
    - CB review process
    - burdensome aspects: effort, cost, demonstration of competence
5. Outcomes for CES

- **Demand for the designation**
  - 57% of non-CEs are interested
    - 64% if CEs and in-process included in the calculation
    - Higher among those without another designation (60%) and among those entering the profession (75%)
    - In 2005: 63% of CES members agreed with "I would likely pursue the requirements of certification as a professional program evaluator if this certification were available"
  - 69% think that the CE is a desirable professional designation
    - particularly those entering the profession (81%)

- **Enviable position of CES within the profession**
  - 84%: the work of CES advances the evaluator profession
    - particularly those entering the profession (92%)

- **Divisiveness**
  - 76%: disagree that the designation creates an unhealthy divide
6. Evolution of Member Views on Profession/Discipline

- **I actively pursue/pursued a career as an evaluator**
  - 2005: 35%, 49%, 63%
  - 2010: 71%, 70%
  - 2014: 59%

- **I became an evaluator through circumstances rather than by career**
  - 2005: 8%, 11%
  - 2010: 59%, 64%
  - 2014: 82%, 88%

- **Evaluation is an area I have entered for a short time in order to develop a well-**
  - 2005: 8%, 9%
  - 2010: 5%, 3%
  - 2014: 3%

- **Evaluation is a profession**
  - 2005: 35%, 49%, 63%
  - 2010: 71%, 70%
  - 2014: 59%, 64%

- **When I'm asked what I do for a living, I say that I am an evaluator or a program**
  - 2005: 35%, 49%, 63%
  - 2010: 55%, 70%
  - 2014: 64%

- **Professionally, I consider myself an evaluator first and foremost**
  - 2005: 35%, 49%, 63%
  - 2010: 55%, 70%
  - 2014: 54%

- **Evaluation is an area I want to leave as soon as possible**
  - 2005: 35%, 49%, 63%
  - 2010: 55%, 70%
  - 2014: 53%

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6. Outcomes for Profession/Discipline

Evaluation is a profession

When I'm asked what I do for a living, I say that I am an evaluator

Professionally, I consider myself an evaluator first and foremost

I actively pursued a career as an evaluator

I became an evaluator through circumstances rather than by career planning

Evaluation is an area I have entered for a short time to develop a well-rounded resume

Evaluation is an area I want to leave as soon as possible

□ Non-CEs (n≈469-482) □ CEs (n=158)
6. Outcomes for Profession/Discipline

- Sense of belonging and professionalization on the rise since 2005
  - Likely that many factors have contributed to this trend (e.g., CES activities)
- Fewer ‘accidental evaluators ’ since 2005
- CEs significantly more likely to have pursued career as evaluators
  - Private sector also more likely than other sectors
- CEs stronger belonging to profession, more likely to say that they are evaluators
  - Evaluators holding another credential less likely to agree that evaluation is a profession
- Few CEs and Non-CEs want to leave the profession

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6. Outcomes for Profession/Discipline

Designation is likely to contribute to stakeholders viewing evaluation as a professional practice

Designation contributes to an increased credibility of all evaluators

Designation has enhanced the credibility of evaluation in Canada

Designation contributes to increasing standardization of evaluation practice

Designation is likely to increase rigidity of evaluation practice

Designation is working against development of evaluation by focusing on policing and control rather than growth and learning

Designation creates an unhealthy divide among evaluators

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Majority (especially CEs) agrees that:
- Credential will contribute to professionalization of evaluation (viewed as practice)
- Credential contributes to credibility of evaluators and evaluation
- Credential will contribute to standardize practice
  - Federal public servants less likely to agree than other sectors in all above

Minority of respondents associate designation with potential negative impacts (rigidity, control, divide among evaluators)
- But 43% of non-CEs associate designation with increased rigidity of evaluation practice
7. Views on Outcomes for Users/Society

- **Designation will likely improve the quality of evaluations being conducted in Canada**
  - CEs (n≈130-155): 65%
  - Non-CEs (n≈274-459): 80%

- **Designation is a good way to identify individuals qualified to conduct evaluation work**
  - CEs (n≈130-155): 60%
  - Non-CEs (n≈274-459): 72%

- **The designation contributes to the protection of users of evaluation against poor practices**
  - CEs (n≈130-155): 53%
  - Non-CEs (n≈274-459): 54%

- **The designation contributes to the protection against evaluators' unethical behaviour**
  - CEs (n≈130-155): 48%
  - Non-CEs (n≈274-459): 54%

- **Designation process does not place enough barriers to unqualified individuals**
  - CEs (n≈130-155): 25%
  - Non-CEs (n≈274-459): 43%
7. Views on Outcomes for Users/Society

- Majority, especially CEs, view designation as contribution to: quality evaluations, identifying qualified individuals
  - Federal government evaluators less likely to agree than others
- About half of all respondents view designation as contributing to protection against poor practices, unethical behavior
- Majority agrees that designation presents barriers to unqualified individuals – especially non-CEs

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## Segmented Analysis

<table>
<thead>
<tr>
<th>Factor</th>
<th>Private Sector</th>
<th>Mun / Reg / Prov</th>
<th>Federal Gov.</th>
<th>NFP &amp; Educatn</th>
<th>1-2 Years Exp.</th>
<th>3-5 Years Exp.</th>
<th>6-10 Years Exp.</th>
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</thead>
<tbody>
<tr>
<td>% CE</td>
<td>29%</td>
<td>7%</td>
<td>9%</td>
<td>9%</td>
<td>1%</td>
<td>4%</td>
<td>13%</td>
</tr>
<tr>
<td>Interest</td>
<td>50%</td>
<td>59%</td>
<td>46%</td>
<td>61%</td>
<td>75%</td>
<td>64%</td>
<td>51%</td>
</tr>
<tr>
<td>Why not?</td>
<td>Too close to retirement</td>
<td>Not in evaluation enough</td>
<td>Not a credible title</td>
<td>Too uncertain, other title</td>
<td>Not a career</td>
<td>Not a career, too uncertain, no time</td>
<td>Employer = not worth it, limited benefits</td>
</tr>
<tr>
<td>PD active</td>
<td>Less</td>
<td>More</td>
<td>More</td>
<td>Less</td>
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<tr>
<td>Seen as prof. eval.</td>
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<td>Self-def. as prof. eval.</td>
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<tr>
<td>Competencies as framework</td>
<td>Less</td>
<td>More</td>
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<td>CE as desirable</td>
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<tr>
<td>CE increases credibility</td>
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<tr>
<td>CE increases standardization</td>
<td>More</td>
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<td>Protection of users</td>
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Conclusion: a Convergence of Factors

Conclusion: a Convergence of Factors

- CES PD/conference
- PDP/CE program
- Lead-up to the program
- Univ. graduate programs
- Value for money climate
- Evidence-informed management
- Buzz in other societies

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Conclusion: Reach

- **Reach**
  - Currently, the most experienced and those for whom benefits are most likely (private sector)
  - Substantial interest among newcomers; sense of a professional life/career path

- **Limited reach**
  - Federal government: lack of recognition within the system
  - Other governments: evaluation one of many activities
  - NFP/Education: uncertainty, other designation

- **Delivery issues**
  - Communication, promotion
  - Burden / cost
  - Transparency
  - Systems
Conclusion: Outcomes

- Outcomes for CEs
  - Limited objective differences between CEs and non-CEs
  - Self-attribution of substantial impact: more than reality?

- Outcomes for non-CEs
  - Competencies making their way into professional consciousness
  - Spill-over effect of the designation?

- Outcomes for CES:
  - Perception of designation generally positive
  - Solid demand in theory
  - CES seen as credible and valuable

- Outcomes for the profession/discipline
  - Good self-attributed outcomes

- Outcomes for users/society:
  - Soft outcomes but still early
Questions for Discussion

• **Reality check:**
  o Do these findings reflect your own views about the designation?
  o How valid and reliable are these data?

• **Reach:**
  o How to extend the reach of the designation?
  o How to convince employers of the benefits of designation?

• **Outcomes:**
  o Why some of expected results are not achieved among some CEs?
  o What are realistic expectations?
  o Outcomes for the discipline: tapped out with senior members?
  o How to strengthen outcomes for users/society?