

CES PDP EVALUATION REQUEST FOR PROPOSAL

The Canadian Evaluation Society (CES) is the professional order for evaluation in Canada. The CES Professional Designation Program (PDP) is a key activity aiming to contribute to the professionalization of evaluation practice in Canada. The program is responsible for the initiation and the management of the CES Credentialed Evaluator (CE) designation which is designed to support professionalization efforts by defining, recognizing, and promoting the practice of ethical, high quality and competent evaluation in Canada.

According to the program design, the holder of the CE designation has provided convincing evidence of the education and experience required by the CES to be a competent evaluator. The process of obtaining the Credentialed Evaluator designation is rigorous, demanding, and introspective. The maintenance of the CE designation demands that CEs accumulate at least 40 hours of Continuing Education Credits over three years.

The CE was created in June 2009 (<http://www.evaluationcanada.ca/ce>) and credentialing activity started in July 2010. A commitment was made upon the creation of the designation to evaluate it after three years. Circumstances were such in 2013 that the evaluation was postponed to 2014. This document presents the terms of reference for the evaluation which is planned to commence in late 2014 with reporting taking place in spring 2015.

SOURCES OF DOCUMENTARY INFORMATION

The following sources of documentary information are or will be available to support the evaluation:

- CES Policy on the CE designation: http://evaluationcanada.ca/txt/20090531_ce_policy.pdf
- Various amendments of the Policy on the CE designation: available from the CES Vice-President (PDP Service Standards, PDP Three-Year Renewal Procedure, Credentialing Board Appointment Process, PDP Operations Guidelines, Credentialed Evaluator Continuing Education Requirements)

- General program information: <http://www.evaluationcanada.ca/ce>
- History of the program: <http://www.evaluationcanada.ca/professional-designations-project-archives>
- Evaluation competencies: <http://www.evaluationcanada.ca/competencies-canadian-evaluators>
- Application process: http://www.evaluationcanada.ca/txt/5_pdp_applicant_guide.pdf
- Special issue of the Canadian Journal of Program Evaluation on the PDP and the CE designation (see Appendix B: Draft Table of Contents)
- Logic model: a logic model was included in the Proposal submitted to the CES National Council in May 2009 (see Appendix A); another logic model is proposed in the CJPE Special Issue.
- Spring 2014 survey of CES members on professionalization and the CE designation: http://evaluationcanada.ca/distribution/20140616_gauthier_benoit_kishchuk_natalie_borys_shelley_roy_simon_n.pdf
- Public registry of CE's (<http://old.evaluationcanada.ca/site.cgi?en:50:2>)
- The Credentialing Board (<http://www.evaluationcanada.ca/credentialing-board>)

CONTEXT

The Professional Designation Program was developed to support CES's vision and mission to lead the professional community of evaluators, to position and build evaluation theory and practice, and to promote quality evaluation work and continuous learning. The PDP is managed by the Vice President of the Canadian Evaluation Society, and is supported by a program administrator. The CE designation is awarded based on the assessment performed by a Credentialing Board, consisting of CES Fellows and Award winners.

The CE designation has been available to professional evaluators for four years. At the outset, a number of CE designations were awarded to CES Fellows and Award winners. The normal application process entails documentary demonstration of graduate degree education and of the equivalent of two full-time years of evaluation experience over the previous ten years as well as education and/or experience related to 70% of the competencies in each of the five domains of Competencies for Canadian Evaluation Practice described in a few dozen brief narratives. Credentialing Board members review the documentation provided by the applicant and determine if he or she has met the requirements to be granted the Credentialed Evaluator (CE) designation.

About a year into the program and for approximately one year, a fast track process was offered to seasoned evaluators. In the fast track process, education and experience were demonstrated in the same manner as in the regular process; competence was assessed via the description of a single significant evaluation project used by the applicant to substantiate their mastery of each of the five competency domains.

As of November 2014, 276 individuals have completed the requirements to obtain the designation and some 87 more have opened an application and are working through the process. About one-half of Credentialed Evaluators used the normal application process and one-half took advantage of the fast track process.

EVALUATION ISSUES

The evaluation is intended to provide CES with information that can be used to improve the design, resourcing, and outcomes of the PDP, and as such is envisioned as a process evaluation in which both process/implementation and early outcomes data are gathered and a relational analysis conducted to understand the relationship between program components and variations in outcomes.

The design should consider the perspectives and experiences of

- internal (employee, salaried) evaluators and external (consultant, contract) evaluators;
- evaluators who sought the designation and those who appear to be eligible but have not sought it to date;
- evaluators who gained the designation using the fast-tracked process and those who used the regular process;
- evaluators whose application was unsuccessful.

The consultant will be expected to work with the PDP evaluation steering committee to refine the following suggested evaluation questions.

1. What expectations do the various stakeholders – CES members (with and without the CE designation), evaluation clients, CES itself – have of the Professional Designation Program? To what extent are their expectations being met?
2. To what extent has the program reached its intended audiences?
3. To what extent do those commissioning evaluations find that the participation by one or more CEs has had an impact on the quality of evaluations? Are there any variations by sector (e.g., government, not-for-profit)?
4. In what ways have reflective processes needed to demonstrate and maintain the CE had an impact on the evaluator's practice? What other impacts do they attribute to these processes?
5. What, if any, are unintended consequences of the PDP / CE? Are these positive (e.g., promotion of evaluation)? Negative (e.g., exclusion of groups; constrained innovation)? How and why have these occurred? Do they have implications for program re-design?
6. What aspects of the program are working well, for whom, and in what ways? Are there program design features that need adjustment (competencies, selection criteria and application and maintenance process, communications, etc.)?
7. What are the necessary success conditions for sustainability and growth of the program? (E.g., relationship with employers; access to evaluation experts into the future to review applications). Is the program financially viable?

EVALUATION METHODS

The evaluation of the PDP and the CE designation must conform to the Joint Committee on Standards for Educational Evaluation (<http://www.evaluationcanada.ca/evaluation-standards>) and CES's code of ethics (<http://www.evaluationcanada.ca/ethics>).

The selection of appropriate evaluation methods is left to the consultant. The CES also expects that the consultant will use a participatory and collaborative approach, will make extensive use of the documentary information which includes a recent survey of CES members (micro-data are available) as well as a consultation of Credentialing Board members. The contractor will be able to access CES' translation services for ensuring that surveys or other data collection methods are available in both French and English. The anonymity of evaluation participants must be ensured.

DELIVERABLES

The PDP Evaluation Steering committee is responsible to generally support the evaluation, and will receive, review and approve the deliverables.

- Evaluation plan and data collection instruments: end of January 2015
- Draft evaluation report: due March 2015
- Final evaluation report: due April 2015, expected approximately 30 pages

The draft evaluation report will be circulated to the PDP evaluation steering committee. Comments will be combined and forwarded to the contractor. Proposed work plans should allow for a maximum of 15 business days for the steering committee's review of the draft report.

SUBMISSION OF PROPOSAL

An electronic copy of the proposal must be submitted to the CES secretariat (secretariat@evaluationcanada.ca) and copied to the CES Vice President

(vice_president@evaluationcanada.ca) by 5 PM EDT, January 9, 2015. Acceptable formats for the electronic version are, *.pdf, *.doc or *.docx.

Proposals should not exceed 10 pages, single-spaced, with 1-inch margins, and 12-point font (excluding references and appendices).

Please contact the CES Vice President (vice_president@evaluationcanada.ca) with any questions or concerns.

The proposal shall be the property of the CES. However, CES shall not publish or release the proposal to any other party without the written consent of the bidder.

SELECTION CRITERIA

The Canadian Evaluation Society expects the evaluation to be conducted at a cost between \$25,000 to a maximum of \$37,500 exclusive of GST/HST. Proposals will be assessed based on the criteria below:

The contractor must submit the proposal by 5 pm, EST, January 9, 2015 . Submissions received after the closing date will be deemed not acceptable.	Pass/Fail
Bids in excess of \$37,500 will not be considered	Pass/Fail
The team leader is a member of a professional evaluation organization	5
Relevant experience of consultant/team	20
Demonstrated knowledge and understanding of professional certification / designation programs	10
Adequacy of approach, design and methodology	40
Detailed project work plan, that includes clear timetables related to data collection,	15

analysis and report writing	
References from 3 sources who can attest to their experience	10

Proposals will be rated using the 100-point scheme described above. Only proposals with at least 80 points will be found technically responsive and considered further. An additional 100 points will be allocated to the technically responsive proposal with the lowest budget; other technically responsive proposals will receive additional points calculated using the following formula: $100 \times (\text{lowest technically responsive budget} / \text{proposal budget})$. Points for quality and points for price will be totaled; the winning proposals will be the one with the highest number of points.

GENERAL CONDITIONS

Right to amend the RFP

CES reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all proponents via email.

Eligibility to bid

Members of the CES Board of Directors and of the Credentialing Board (present and over the past four years) are not eligible to bid on this contract.

Language of submissions and reports

All proposals must be submitted to CES in English or French. Contacts with informants should be conducted in the official language preferred by the informant. The final report (or a summary of it) will be translated by CES before posting on the CES National website.

Bidder incurred costs

All costs incurred in the preparation and presentation of proposals in any way whatsoever shall be wholly absorbed by the bidder(s).

Indemnity

The bidder(s) will indemnify and save harmless CES from and against all claims, demands, losses, damages, costs and expenses made against or incurred, suffered or sustained, done or omitted by CES at any time before or following termination of the agreement.

Acceptance of proposals

CES is not bound to accept the lowest price or any proposal of those submitted.

Evaluation of proposals

The PDP evaluation steering committee members will evaluate all complete proposals. The right is reserved to make an award based directly on the proposals submitted or to negotiate further with one or more proponents.

Maximum Funding

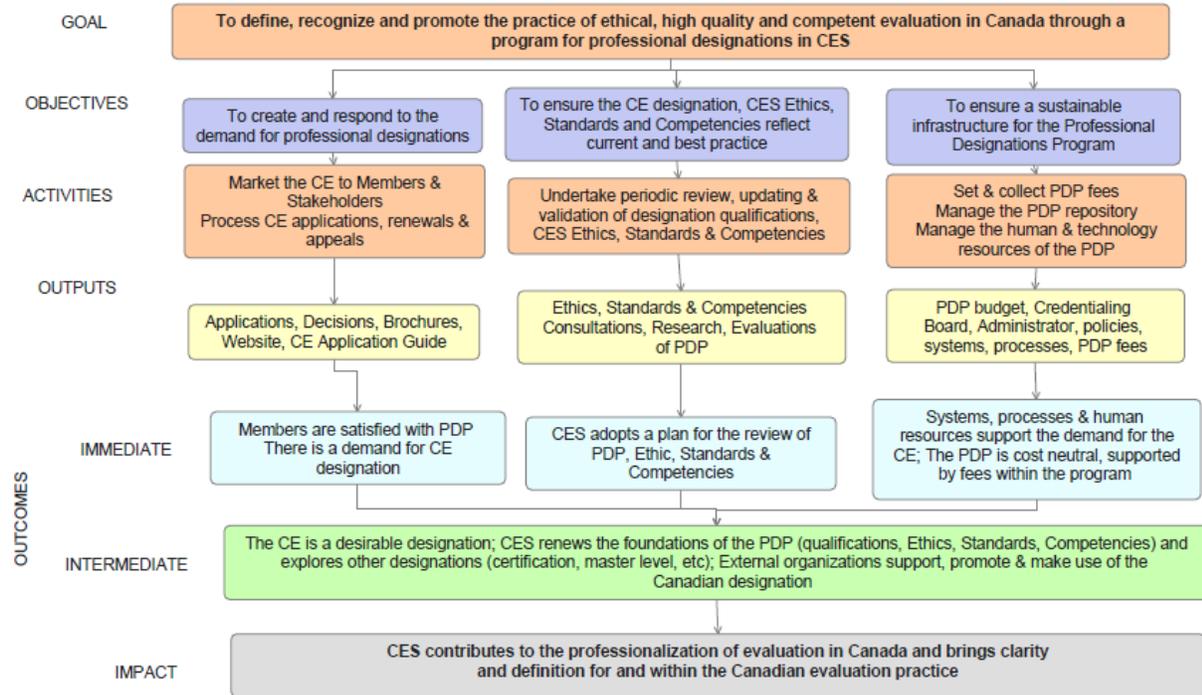
CES has allocated a maximum of \$37,500 (exclusive of GST/HST) for this evaluation. Bids in excess of \$37,500 will not be considered.

Termination of contract

A contract awarded on the basis of a response to this RFP may be terminated by either party with two weeks' notice, with outstanding payments to be negotiated between the contractor and the CES.

Appendix A

Professional Designation program (PDP) Logic Model



Appendix B

Canadian Journal of Program Evaluation (CJPE) - Professionalization of Evaluation in Canada

DRAFT Contents (December 2014)

Introduction to this Special Issue on Professionalization of Evaluation in Canada by Heather Buchanan and Keiko Kuji-Shikatani, Guest Editors

Professional Standards for Evaluators: The Development of an Action Plan for the Canadian Evaluation Society by Gerald Halpern, Benoît Gauthier and James C. McDavid.

A Made-in-Canada Credential: Developing an evaluation professional designation by Heather Buchanan.

The Development and Initial Validation of Competencies and Descriptors for Canadian Evaluation Practice by Brigitte Maicher and Christine Frank.

Launching the Credentialed Evaluator (CE) Designation by Keiko Kuji-Shikatani, Maureen Mathew, Patricia Streich and Marilyn Thompson.

View from the Credentialing Board: Where we've been and where we're going by Gail Vallance Barrington, Christine Frank, Benoît Gauthier and Karyn Hicks.

The CES Professional Designations Program: Views from Members by Benoît Gauthier, Natalie Kishchuk, Shelley Borys and Simon N. Roy.

From the Outside, Looking in with a Smile: A Summary and Discussion of CES's Credentialed Evaluator Designation by Jean A. King

A Point of No Return Finally Reached: The Journey Ahead by François Dumaine