CES Intermediate-level Professional Learning Program:
Stage One Report – May 16, 2015
Abridged Version

Full Report Prepared by
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Background

CES members have indicated a desire for more intermediate-level evaluation training. In 2013 CES National acted in response to this need by supporting a survey of members to identify their level of interest in 23 potential course topics. Following this survey CES National decided to implement a two-stage plan to initiate development of additional professional learning at this level:

- Stage One - Broadly define at least six intermediate courses\(^1\) to be sanctioned by the CES
- Stage Two - Engage contactors to design the curriculum for each

The purpose of Stage One was to bring the conceptualization of the courses to a point where development of individual courses can be commenced through the development of:

- a short-list of six to seven course areas
- high-level course outlines including learning objectives, major content areas, and delivery options
- an implementation plan for Stage Two
- a proposed budget
- a draft Request for Proposal (RFP) for soliciting course designers
- recommended template for curriculum design
- a list of possible subject matter experts (SMEs) and instructional designers.

The courses are intended to range from three hours to two days maximum and would ideally be delivered via a variety of formats to meet the varying needs and geographical locations of members.

CES Professional Learning Committee member and Credentialed Evaluator, Sandra Sellick, served as the CES contact for this the project. To provide input into the process an Advisory Committee was struck consisting of the following CES members:

- Keiko Kuji-Shikatani
- Nancy Carter
- Russ Graham
- Simon Roy
- Steve Montague

Two ad-hoc members also participated in meeting discussions: Benoît Gauthier, CES President, and Kathy Gerber, Chair, Professional Learning Committee.

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\(^1\) For the purposes of this report, the term “courses” has been used as a generic term to refer to workshops, webinars, eLearning, blended learning, and other forms of non-university professional development lasting a maximum of two days or less.
Methodology

As the recipient of the Stage One contract I conducted the following activities:

- facilitated the determination of a short-list of six to seven topic areas
- conducted an environmental scan of existing courses
- drafted course outlines for each topic area
- sent the course outlines out for review by selected subject matter experts and the Advisory Committee
- researched typical course development costs.

Initial Course Selection

Although the initial survey of members provided some direction in terms of course topic areas, there were few obvious choices arising from the findings. Therefore, I triangulated information from three sources to assist the Advisory Committee in making a rational and transparent decision:

- the 2013 member survey
- Advisory Committee discussions
- ad-hoc key informant interviews with nine leaders of the evaluation community:
  - Shelley Borys, Director General, Evaluation Directorate, Public Health Agency of Canada (PHAC)
  - Anne Patenaude, Director, Evaluation, formerly Dept. of Fisheries and Oceans (DFO), now Internal Audit
  - Brian Moosang, Senior Advisor, Treasury Board Centre of Excellence for Evaluation
  - Yves Gingras, Director General, Employment and Social Development Canada (ESDC) Evaluation Directorate
  - Wendy Rowe, Professor, Royal Roads/Consortium of Universities for Evaluation Education (CUEE)
  - Isabelle Bourgeois, Professor, École nationale d'administration publique (ENAP)
  - Gail Vallance Barrington, Principal, Barrington Consulting
  - Susan Kistler, Past Executive Director, American Evaluation Association (AEA)
  - Stephanie Evergreen, Past Director, eLearning Initiatives, AEA

The Advisory Committee agreed to the final short-list of topic areas below:

- Evaluation Theories & Models (including Systems)
- Economic Evaluation/Cost Analysis
- Data Quality Assessment
Courses not making the short-list, but recognized as priorities for future development included:

- more detailed and advanced Quantitative Approaches for Evaluation
- Triangulation Techniques
- Rapid Assessment Methodology
- Communicating Findings

**Environmental Scan**

Once a short-list of seven courses was determined, I conducted a targeted environmental scan of existing intermediate-level workshops and webinars in the evaluation field. The search methodology included:

- CES professional development webinars
- CES pre- and post conference workshops (2008 – 2015)
- AEA Summer Evaluation Institute (2014-15)
- Claremont Professional Development Workshop Series (2014)
- Statistics Canada
- Marketing Research & Intelligence Association (MRIA)
- The Evaluator’s Institute (2015)
- AEA pre- and post conference workshops (2008 – 2015)
- International Institute for Qualitative Methodology (University of Alberta)
- IPDET
- EvalPartners
- Consortium of Universities for Evaluation Education (partial search)
- general Google search on “evaluation training” and other keywords
- Coursera & Ed/X

The results indicated gaps in certain areas and provided detailed information on the scope, length, and cost of typical training offered which was useful for later development of the course outlines.

**Course Outlines**

Next, I developed high-level course outlines using information from the environmental scan and my own evaluation knowledge. I then sent these draft outlines to selected subject matter experts for review and comment as listed in each individual outline.
a) Intermediate-level Target

The distinction between Beginner, Intermediate, and Advanced can be blurry and subjective and assigning a level of “intermediate” is challenging. However, the Advisory Committee was unanimous in their belief that these courses would:

- not be a substitute for university-level courses (approx. 36-39 hours)
- emphasize relevancy and practical application for practicing evaluators (vs. theory only)
- focus on Canadian evaluation contexts and examples
- require participants to have familiarity with basic evaluation concepts plus direct practical experience conducting or commissioning an evaluation.

Existing Course Level Definitions

<table>
<thead>
<tr>
<th>CES Professional Learning Committee Guideline</th>
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<tbody>
<tr>
<td>• Introductory level focuses on basic concepts and generic techniques</td>
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<tr>
<td>• Intermediate level provides in-depth information and hands-on learning</td>
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<tr>
<td>• Advanced level covers challenging topics and focuses on discussion among informed parties</td>
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<table>
<thead>
<tr>
<th>AEA Pre-Conference Workshops</th>
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<tbody>
<tr>
<td>• Beginner: Attendees need no prior knowledge of the specific content area in order to participate fully and effectively in the workshop. The information or skills will be new for those who enroll.</td>
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<tr>
<td>• Intermediate: Attendees need some basic knowledge of the specific content area, but need not have in-depth knowledge or skills. The workshop will focus on knowledge or skills that build on the basics.</td>
</tr>
<tr>
<td>• Advanced: To participate fully, attendees must have a substantial working knowledge or skill level in the specific content area. Generally attendees currently use the knowledge or skills in their jobs. At this level, knowledge or advanced techniques are offered to refine and expand current expertise.</td>
</tr>
</tbody>
</table>

b) Continuum of Learning

Using a model similar to the Marketing Research and Intelligence Association courses have been classified along a continuum of learning as either “core” or “professional development” according to the following definitions and figure.

- Core courses
  - provide a continuum of learning for members with intermediate content that builds directly on the Essential Skills Series
  - range in topic and complexity, but, when viewed as a whole, represent a diverse and critical wealth of knowledge for any individual who wishes to be recognized as a Credentialed Evaluator

- Professional Development courses
- are geared to more experienced practitioners
- are shorter, in-depth, and nimble offerings on more specialized and/or timely topics that are difficult to classify as either intermediate or advanced
- provide a future option to address topics identified on the 2013 member survey but not included in this phase of the course development
- may be able to take advantage of other innovative delivery formats, e.g. podcasts with thought leaders

Professional Learning in Evaluation

![Diagram of course offerings]

**c) Draft Outlines**

Draft course outlines are found in the appendix of the draft Request for Proposals. Note that these outlines should be edited prior to circulating the actual RFP and will likely change slightly to better reflect what the course developers believe is feasible within the time frame and is a priority for inclusion.

**d) Sanctioning External Courses**

While the idea of sanctioning other courses sounds good in theory, it would not meet the Advisory Committee’s desire to develop courses that are specific to the Canadian evaluation
context. The CES also does not currently have a process in place for sanctioning external courses. What I believe is a more likely scenario is that individuals who already deliver evaluation courses might apply to the RFP and adapt their existing course material for the CES in a cost-efficient manner.

The only course area where sanctioning appears to make sense is for Evaluator Ethics. To this end, I recommend that the CES conduct a formal review of both the ARECCI and TCPS 2 CORE ethics courses by selected members of both the CES Professional Designations and Professional Learning committees to determine the appropriateness of each for CES’ needs, plus any necessity for customization for an evaluation context.

e) Course Development Coordinator

Evaluation experience plus instructional design is a rare skill combination, and I suspect many RFP proponents will only be SMEs. Therefore, I recommend pairing all SMEs with an instructional designer (ID) for course development, either one provided by the CES or one of their own choosing. This individual must have significant experience with distance online training. Two IDs that I spoke with believed that most of the budget would be spent on the SME’s time, with the ID acting more like a coach.

Another option is to hire an individual with instructional design to not only work with individual SMEs but also manage the entire course development and piloting process. While this will have budget implications, it will greatly serve to improve the curriculum quality and overall learner experience and satisfaction. Instructional designers charge between $50 - $100 per hour.
### Proposed Implementation Plan

<table>
<thead>
<tr>
<th>Activity</th>
<th>2014-15</th>
<th>2015-16</th>
<th>2016-17</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Advisory Committee sign-off on course outlines, budget, RFP, and work plan</td>
<td>Ma 2014-15</td>
<td>Ju 2015-16</td>
<td>Ma 2016-17</td>
</tr>
<tr>
<td>2. Professional Learning Committee review and sign-off of course outlines, budget, RFP, and work plan</td>
<td>Ma 2015-16</td>
<td>Ju 2016-17</td>
<td>Ma 2017-18</td>
</tr>
<tr>
<td>3. CES Board review and sign-off of course outlines, budget, RFP, and work plan</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
<tr>
<td>4. Recruit and hire Project Manager</td>
<td>Ma 2015-16</td>
<td>Ju 2016-17</td>
<td>Ma 2017-18</td>
</tr>
<tr>
<td>5. Issue RFP for individual course developers</td>
<td>Ma 2015-16</td>
<td>Ju 2016-17</td>
<td>Ma 2017-18</td>
</tr>
<tr>
<td>6. Select and award course development contracts</td>
<td>Ma 2015-16</td>
<td>Ju 2016-17</td>
<td>Ma 2017-18</td>
</tr>
<tr>
<td>7. Strike individual course Reference Groups (2-3 members max)</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
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<tr>
<td>8. Course development period</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
<tr>
<td>9. Reference Groups review and comment on courses</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
<tr>
<td>10. Professional Learning Committee reviews and signs-off on courses</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
<tr>
<td>11. Pilot test initial offerings</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
<tr>
<td>12. Course developers incorporate feedback and make revisions</td>
<td>Ma 2016-17</td>
<td>Ju 2017-18</td>
<td>Ma 2018-19</td>
</tr>
</tbody>
</table>
# Courses at a Glance

<table>
<thead>
<tr>
<th>Topic</th>
<th>Evaluation Theories &amp; Models</th>
<th>Economic Evaluation/Cost Analysis</th>
<th>Interpreting and Using Quantitative Results</th>
<th>Data Quality Assessment for Evaluators</th>
<th>Systematic Qualitative Analysis for Evaluators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Audience</strong></td>
<td>Evaluators or end-users/commissioners of evaluation projects</td>
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</tr>
<tr>
<td><strong>Pre-requisites</strong></td>
<td>Familiarity with basic evaluation concepts plus direct experience conducting or commissioning an evaluation. Prior completion of the CES Essential Skills Series is advised.</td>
<td>Familiarity with basic evaluation concepts plus direct experience conducting or commissioning an evaluation. Prior completion of the CES Essential Skills Series is advised.</td>
<td>Participants should have experience either conducting or commissioning evaluation projects plus familiarity with basic quantitative analyses. Prior completion of the CES Essential Skills Series plus university-level statistics is strongly advised.</td>
<td>Familiarity with basic evaluation concepts plus direct experience conducting evaluation and working with qualitative data. Prior completion of the CES Essential Skills Series is advised.</td>
<td></td>
</tr>
<tr>
<td><strong>Competencies</strong></td>
<td>Technical Situational</td>
<td>Technical</td>
<td>Technical</td>
<td>Technical</td>
<td>Technical</td>
</tr>
</tbody>
</table>
| **Learning Objectives** (At the end of the course, participants will be able to:) | • explain how evaluation theory can be used to improve evaluation practice  
• distinguish between major theoretical perspectives and different evaluation approaches using defined criteria  
• assess their own practice critically and select an appropriate evaluation approach for a given context  
• identify criteria for selecting an evaluation approach that matches the evaluation context  
• describe the application and use of different evaluation approaches | • identify situations where economic evaluation is warranted and feasible  
• distinguish between the most common types of economic evaluation used in evaluation  
• define common terms used in economic evaluation related to costs and outcomes  
• define summary measures used for different economic evaluation methods  
• describe sensitivity analysis techniques often used in economic analyses  
• describe typical challenges and limitations encountered when conducting and using economic evaluation  
• design a basic cost analysis, as the first step in an economic evaluation  
• interpret and present findings from a basic cost analyses | • identify common statistical tests used to address typical evaluation questions  
• explain when to use which tests and why and under what conditions  
• accurately interpret statistical output produced by others and derive conclusions  
• describe common pitfalls when interpreting quantitative analysis | • explain points in the evaluation process where data quality issues are addressed  
• describe typical errors and quality issues that evaluators face with primary and secondary quantitative and qualitative data  
• identify DQA techniques to improve the quality of both primary and secondary data | • state the advantages and limitations of qualitative data  
• distinguish between different types of qualitative analysis  
• choose an appropriate type of qualitative analysis for a given evaluation context  
• describe practical and ethical issues when analyzing, interpreting, and reporting qualitative data as well as common pitfalls |
| **Delivery Options** | • webinar (6 hours) | • in-person (2 days) – to allow for significant hands-on practice and opportunity for questions  
• using a co-instructor model where a Subject Matter Expert is teamed with an experienced trainer to ensure the content remains at a practical and relevant level | • in-person (2 days) | • webinar (3 hours) | • In-person (2 days) |
<table>
<thead>
<tr>
<th>Topic</th>
<th>Evaluability Assessment</th>
<th>Ethics for Evaluators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Audience</td>
<td>Evaluators or end-users/commissioners of evaluation projects</td>
<td>This course is designed for evaluators or end-users/commissioners of evaluation wishing to expand their knowledge of ethical issues for evaluators.</td>
</tr>
<tr>
<td>Pre-requisites</td>
<td>Familiarity with basic evaluation concepts plus direct experience conducting or commissioning an evaluation. Prior completion of the CES Essential Skills Series is advised.</td>
<td>Participants should have a familiarity with basic evaluation concepts plus direct experience conducting evaluation. Participants must provide evidence of completion of [Phase 1 course] at the time of registration. Prior completion of the CES Essential Skills Series is advised.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Technical Situational</td>
<td>Reflective Interpersonal</td>
</tr>
<tr>
<td>Learning Objectives</td>
<td>• distinguish between evaluability assessment and full-scale evaluation</td>
<td>CES Portion:</td>
</tr>
<tr>
<td></td>
<td>• state the benefits of an evaluability assessment</td>
<td>• summarize the CES Guidelines for Ethical Conduct</td>
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<td></td>
<td>• describe different evaluability assessment models and summarize common components across models</td>
<td>• describe common ethical issues faced by practicing evaluators</td>
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<td>• describe tools and techniques for conducting an evaluability assessment</td>
<td>• explain the role of cultural competence in ethical evaluation practice</td>
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<tr>
<td></td>
<td>• give examples of common challenges and strategies for success</td>
<td>• identify potential ethical challenges in an evaluation</td>
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<td></td>
<td></td>
<td>• articulate/access alternative or optional approaches to resolving ethical issues</td>
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<tr>
<td></td>
<td></td>
<td>• promote open discussion of ethical challenges and options for resolution in their work environment</td>
</tr>
<tr>
<td>Delivery Options</td>
<td>• webinar (3 hours)</td>
<td>• I suggest addressing the topic area of ethics through a two-phase process:</td>
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<tr>
<td></td>
<td></td>
<td>• Phase 1: Members complete either the ARECCI or TCPS 2 CORE course</td>
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<tr>
<td></td>
<td></td>
<td>• ARECCI – eLearning plus 1 day in-person</td>
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<td></td>
<td></td>
<td>• TCPS 2 CORE – self-paced eLearning</td>
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<td></td>
<td></td>
<td>• Phase 2: Members complete a one day in-person workshop to address other CES-specific ethical issues not covered in the above</td>
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