



Canadian Evaluation Society Professional Designations Program Policies and Operational Guidelines

Approved in conjunction with approval of Policy OP-12, Credentialed Evaluator Designation by CES National Board, March 13 2019

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Chapter 1: Introduction to the Credentialed Evaluator (CE) Designation

1.1 Purpose and Nature of the Credential

One of the key roles of the Canadian Evaluation Society (CES), the professional association for program evaluation in Canada, is to contribute to the professionalization of evaluation practice. The CES Credentialed Evaluator (CE) program is designed to support professionalization efforts by defining, recognizing, and promoting the practice of ethical, high quality and competent evaluation in Canada. The program is founded on three pillars: professional standards, a code of ethics, and defined competencies. The CE designation is a service provided by CES to its members, who may elect to become credentialed on a voluntary basis.

The CE is a credential awarded to an individual. It is **not** a certificate or license (where an individual's competence on specific skills and knowledge are tested formally) nor an accreditation (a term usually reserved for educational programs or organizations such as universities or hospitals). The CE indicates that the individual possesses the required education, experience and professional competencies to be recognized as a competent practitioner. It is an attestation that the CE holder values continuous learning and is committed to the evaluation profession.

1.2 General Description of the CE Process

The holder of the CE designation has provided convincing evidence of the requisite skills, knowledge and practical experience identified by the CES as those necessary to be a competent evaluator. The process of obtaining the Credentialed Evaluator designation is rigorous, demanding, and introspective. The applicant compiles the information into a portfolio, requiring submission of:

- curriculum vitae and statements of work experience in program evaluation as defined by CES¹ from one or more employers, clients or supervisors, to establish that the applicant has the required two years of fulltime evaluation work experience;
- educational certificates or credentials, to establish that the applicant has the required level of education.

The applicant then goes online to complete a self-assessment illustrating his or her competencies as defined by the Competencies for Canadian Evaluators. The five competency domains are:

- Reflective Practice: Competencies focus on the evaluator's knowledge of evaluation theory and practice; application of evaluation standards, guidelines, and ethics; and awareness of self, including reflection on one's practice and the need for continuous learning and professional growth.
- Technical Practice: Competencies focus on the strategic, methodological, and interpretive decisions required to conduct an evaluation.
- Situational Practice: Competencies focus on understanding, analyzing, and attending to the many circumstances that make every evaluation unique, including culture, stakeholders, and context.

¹ Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making. <https://evaluationcanada.ca/what-is-evaluation>

- Management Practice: Competencies focus on applying sound project management skills throughout the evaluation project.
- Interpersonal Practice: Competencies focus on the social and personal skills required to communicate and interact effectively with all stakeholders.

The submitted portfolio is reviewed by members of the CES Credentialing Board (CB), comprised of senior evaluation professionals recognized as experts by the evaluation community.

If the applicant is successful, a letter from the Vice-President with a certificate follows, and the CE is added to the public roster. The CE is encouraged to publicly identify him or herself as such in his or her professional signature.

The newly Credentialed Evaluator is then obliged to document his or her education and learning over the ensuing years to fulfill the maintenance requirement for the CE. Forty hours of professional development are required over every subsequent three-year period.

If the applicant is unsuccessful, he or she may resubmit the application as many times as desired within the three-year application window with no additional cost, incorporating revisions based on feedback from the review(s) and/or acquisition of further knowledge and experience.

1.3 General Roles and Responsibilities

There are a number of people and committees who are involved with the oversight and management of the Professional Designations Program.

- Canadian Evaluation Society National Board of Directors

National Board has the ultimate responsibility for the PDP in that it approves funding, sanctions the activities of the National Vice-President, and approves the slate of candidates for the Credentialing Board (CB). It has the final approval on CB policies and strategic direction of the program.

- National Board of Directors Vice-President²

Reporting to the President, the Vice-President/CES PDP Lead oversees the administration of the Professional Designations Program (PDP). The Vice-President/CES PDP Lead contributes to aligning the PDP with the CES Professional Learning Strategy through membership in the Professional Learning Committee. He or she represents the CES National Board and the PDP in the Consortium for University Education in Evaluation (CUEE)³ and may provide input into the

² Future re-organization of the CES National Board may see evolution in the Vice -President’s mandate. In this document, when relevant, the term “CES Lead for the PDP Program” is used, in case in the future that role is not invested in the Vice President.

³ The CUEE was created in 2008 as a voluntary, collaborative partnership among universities, government and CES. Its aim is to increase access to high quality, graduate-level education in evaluation that enables its graduates to

orientations and offerings of the e-Institute.

- Credentialing Board

In addition to reviewing applications, the Credentialing Board (CB) is a decision-making mechanism of the CES, constituted as an integral component of the Professional Designations Program (PDP).

Under the direction of the Vice-President/CES PDP Lead, the CB renders decisions on applications for professional designations and provides advice to the Vice-President/CES PDP Lead on the design and management of the PDP. The CB undertakes revisions to the Competencies for Canadian Evaluators in a consultative process as often as deemed necessary.

- Applications Administrator

The Applications Administrator position is a part of the CES Secretariat and provides support to the Vice-President/CES PDP Lead. The administrator handles the day-to-day administrative tasks for the PDP.

1.4 Ongoing evaluation and improvement of the PDP

In the interest of keeping the program current and its operations efficient, it is recommended that:

- An evaluation of the program be completed at least every 10 years;
- A review of the competencies be completed at regular intervals with a view to keeping current with changing methodologies, theories, technologies and skill sets.

In addition, the Vice-President/CES PDP Lead and CB may recommend policy and operational improvements to National Board in response to emerging needs of the program.

Chapter 2: Acquisition and Maintenance of the Credential

2.1 Requirements

The approved requirements for the CE designation are of two types: eligibility requirements, and competency requirements.

ELIGIBILITY REQUIREMENTS

Current membership in the CES or as a joint member of the CES *and* another evaluation society.

AND

One of the following for educational achievement:

Graduate level degree (Master's or PhD) from:

- an accredited Canadian institution, according to the [Social Sciences and Humanities Research of Canada](#) or

acquire the required competencies to practice as evaluators and eventually to meet the academic requirements for the CE designation.

- a recognized non-Canadian university on the list of the top 500 recognized world universities / institutes as found at <https://www.timeshighereducation.com/news/world-university-rankings>, or; <https://www.topuniversities.com/university-rankings/world-university-rankings>, or <http://www.shanghairanking.com>

Or

An undergraduate degree along with a Graduate Certificate /Diploma from a recognized university. This graduate certificate must be in Program Evaluation.

In general, certifications from other professional bodies are not considered to be equivalent to a Graduate Certificate /Diploma from a recognized university in Program Evaluation field.

If neither of the above two conditions are met, the applicant may be eligible to establish his or her educational equivalence in a Prior Learning Assessment and Recognition (PLAR) pathway. Please see section 2.4.

AND

Two full-time years (equivalent) of program evaluation-related experience in the last ten years, demonstrated through professional references.

Note that in general, practicum or internship experience acquired during an educational program is NOT considered eligible work experience, as it is a designated component of the educational requirement. Exceptions may be made for senior-level practica when the basic educational requirement has already been met, such as a post-doctoral fellowship.

COMPETENCY REQUIREMENTS

Education and/or experience of 70% in each of the five domains in the Competencies for Canadian Evaluation Practice, demonstrated through the submission of the applicant’s CV and a short narrative for each selected competency developed by the applicant as evidence of the knowledge and skills.

Competency by Domain	Total number of competencies	Required number of competencies
1.0 Reflective Practice	8	6
2.0 Technical Practice	10	7
3.0 Situational Practice	7	5
4.0 Management Practice	6	5
5.0 Interpersonal Practice	5	4

Competencies for Canadian Evaluation Practice, Approved by CES National Board, October 19 2018.

2.2 Application Process

2.2.1 Deciding to apply

Before submitting an application, potential candidates should review the requirements for the CE to determine if they meet the eligibility and competency requirements. Even if the applicant's educational requirements and work experience are sufficient for an application, the competencies are specific and will require thought and reflection to prepare a response. Candidates may wish to review the competency set; a full description is available on the CES website. If a self-assessment suggests to potential applicants that they may lack one or more competencies, they can decide to apply at a later date. Taking additional coursework, remaining as an active member of the CES, participating in webinars, listening to podcasts and gaining additional hands-on experience will serve to strengthen an applicant's chance of success. Potential applicants may contact their local or closest CES Chapter to identify CB members or CEs who could provide guidance about the process, the requirements and the expectations for a CE. International applicants can contact the CES Vice-President (vicepresident@evaluationcanada.ca) for information or for a referral to someone who can assist them.

Applicants are encouraged to keep in mind that the intent of the CE is to encourage evaluation professionals to maintain their knowledge and skills. This means that even after they have been accepted as a CE, they will be expected to stay current in the field and they will have to maintain and document their learning. A minimum of 40 hours of professional learning must be documented every three years.

2.2.2 Application Process: Regular Stream (i.e. not PLAR)

CE applications are submitted on-line through the CES member dashboard website. They may be submitted in either official language.

Step 1

- Applicant completes an online self-assessment checklist to see if they meet the CE requirements (Appendix 1)
- Applicant checks to see if CES membership is current and in good standing and contacts the Application Administrator to inform them of their intention to apply.
- The Application Administrator assigns a login ID, a temporary password and instructions so that the applicant can transfer necessary documents.

Step 2

- The applicant will upload:
 - A current CV;
 - One or more statements of program evaluation work demonstrating the required two years of experience, attested by the applicant's employer, supervisor or clients. Upon signing the statement of work experience, the applicant agrees that the reviewers have the right to verify information from the referees.
 - Evidence of educational achievement: a copy of graduate degree or graduate diploma or certification in program evaluation or associated field.

Step 3

- The Application Administrator checks the documentation to ensure that what has been provided is appropriate, signed and complete.
 - If documents are missing or incomplete, the Administrator will notify the applicant.
 - If the CV, experience or education is not appropriate to the field of program evaluation, the Administrator will notify applicant and document the reasons. The application will be suspended until deficiencies are corrected, e.g. applicant acquires and documents the necessary two years' evaluation experience.
- If all is in good order, i.e., the applicant is eligible, the Administrator sends the applicant an invitation to complete the competency requirements self-assessment.
- At the time the applicant is deemed eligible, the applicant pays the one-time \$485 application fee. Reviews will not proceed until fees are paid.

Step 4

- The applicant proceeds with the competency section of the application. He or she has three years from the date of payment to complete it.
- Well-written responses make it easier for the reviewer to understand the applicant's point of view and demonstrate professionalism. As there is limited space for responses, applicants are encouraged to compose their responses in Word (using a character or word count) and then cut and paste into the system so that paragraphs are not left incomplete. This also allows spelling and grammar correction.
- The Administrator makes arrangements for two CB members to review the completed application.
 - To maintain confidentiality, communication among the Administrator and the reviewers uses the Applicant's CES membership number.
 - Reviewers first establish that they are not in conflict of interest with the application (see section 4.1); if they judge themselves to be, they inform the administrator who assigns another reviewer. They may seek guidance from the Vice-President/CES PDP Lead in case of doubt.
- The reviewers access the uploaded documents and competency form in the on-line reviewer dashboard. They assess:
 - Whether the educational requirements are met, based on the uploaded documents or a prior PLAR assessment
 - Whether the work experience requirement is met, based on the letters of reference, in conjunction with the CV. If they have questions about the nature or timelines of the work experience in program evaluation, they may contact the references for clarification.
 - Whether each of the competencies has been demonstrated, based on the competency form (see Section 2.3).
- Applications are reviewed within the timelines set forward in the CB service standards (see Section 4.2.9).
- Reviewers may communicate with each other to clarify aspects of the application. If they wish to contact the other reviewer, they make this known to the Administrator, who puts them into contact.

Step 5

- Notification of the status of the application is documented electronically in the PDP on-line system.
- Once both reviewers have completed their assessment, the Administrator notifies the Vice-President/CES PDP Lead of the decision.
- If the applicant is successful, he or she will receive an email notification and congratulations letter from the Vice-President and President, followed by a physical certificate and pin. His or her name and contact information, if desired, are then entered on to the roster of credentialed evaluators on the CES website. The CE is encouraged to include the designation initials and visuals in his or her professional signature.
- If the applicant is unsuccessful, he or she is provided with constructive feedback from the CB reviewers as to how the applicant can be successful in achieving the CE designation. This may include advice on further learning or may relate to the application itself as being unconvincing of applicant's knowledge or competency.
- If the applicant is unsuccessful, he or she has the options of:
 - Requesting an appeal (see further information in appeals section, 2.5.3).
 - Resubmitting the application. In this case, the reviewers will compile comments and suggestions for studies, experience or education that the applicant might consider before re-applying. These comments will be forwarded to the applicant through the Administrator. The applicant may resubmit as many times as desired within the three-year application window.
 - If an unsuccessful applicant re-submits an application, two new reviewers are assigned. The new reviewers may obtain previous reviewers' comments in order to determine progress.
- In the case of a split decision between two reviewers, a third reviewer will be engaged to complete the review. If the third reviewer determines and notifies the Administrator that the applicant requires further preparation, the Administrator compiles comments of the two previous reviewers and asks the third reviewer to prepare a synthesis of the comments.

Step 6

- The new CE should start immediately to acquaint him or herself with the maintenance system and begin documenting his or her professional learning activities.

2.3 How CES Competencies are assessed

Two CB members are assigned to each review. They will read all of the documentation, including the CV, which may provide contextual information regarding the interpretation of the competencies.

Competencies declared through professional experience may come from:

- Employment (including teaching);
- Volunteering on program evaluations; or
- Other evaluation-related activities.

As noted above, practicum experience during the acquisition of the educational requirement is not eligible as professional experience.

Competencies declared through education come from both formal and non-formal education (including CES workshops). Statements are more credible if the stated training includes the name of the course (and course number if applicable) and the post-secondary institution or the organization that provided it.

Reviewers expect to see insight, understanding or other evidence to support the claim of competence, and will not accept simple declarations or restatements of the competency or a description of it. It is most helpful for an applicant to provide examples of how the competency was applied or how the theory behind the competency was utilized.

Each statement under each competency is assessed for appropriateness, understanding or experience. Reviewers check “Yes” or “No” to indicate whether the competency has been demonstrated. The assessment system calculates whether the 70% requirement has been met in each domain, and therefore whether the overall level of competency has been demonstrated or whether further preparation is required.

Comments from the reviewers on further preparation are expected to be thoughtful, constructive and instructional, written from the standpoint of how the applicant can be successful in obtaining the CE designation.

2.4 Prior Learning Assessment and Recognition (PLAR): Principles and Process

2.4.1 Overview

Applicants who have neither of a) a post graduate degree, or b) a post graduate diploma or certificate in program evaluation, may be able to demonstrate the equivalent learning through extensive work experience and professional development. This will be demonstrated through submission and assessment of a professional portfolio.

NB: The process described below is newly introduced, and so will be piloted and evaluated. A first pre-pilot will be conducted in 2019 with individuals who have already expressed interest in the PLAR for their CE application. A more formal pilot will be conducted with the next set of new applicants. Results of both pilots will be used to improve the policy and process.

Prior Learning Assessment and Recognition “defines processes that allow individuals to identify, document, have assessed and gain recognition for their prior learning. The learning may be formal, informal, non-formal, or experiential. The context of the learning is not key to the process as the focus is on the learning.”⁴

To be considered for post-secondary equivalence in the context of professional evaluation practice, prior learning must meet the following criteria:

- Be verifiable;
- Be applicable outside the context in which it was learned;
- Have a theoretical and applied component (knowledge, performance, and evidence from prior learning);
- Be drawn from reflection above and beyond ordinary work/life experience;

⁴ <http://capla.ca/what-is-rpl/>

- Relate to a recognized vocation, profession, or academic discipline.

2.4.2 Eligibility criteria

Operationally, it is required that:

- The applicant has been in the work force for at least 10 years; and
- Within those 10 years, the applicant has at least six years of full-time experience⁵ in program evaluation, as recognized in letters of validation from employers in program evaluation as defined by CES⁶ from one or more employers, clients, supervisors or Elders.

2.4.3 PLAR Application process

PLAR applicants will pay a one-time fee of \$550 that will cover the both the assessment of their PLAR portfolio and their Credentialed Evaluator application.

Step 1: Pre-approval. Prior to paying the CE PLAR Application Fee, individuals interested in the PLAR pathway are asked to submit:

- a maximum one-page letter to the PDP Administrator explaining how they meet the eligibility criteria
- the self-assessment pre-application checklist for the CE (Appendix 1), highlighting the educational requirements area;
- a copy of highest formal education degree(s) or courses (e.g. transcripts showing number of credits), certificates, and/or other forms of education recognition obtained.

The Administrator will review these documents and contact the Vice-President as necessary; the latter may also contact the applicants. This is a gate-keeping step, intended to ensure that PLAR applicants have the potential to be successful. The applicants will then be informed as to whether they should or should not apply. Once pre-approval is confirmed, the applicant will be asked to pay the fee of \$550.

Step 2: Portfolio submission. After pre-approval from CES, the applicant will submit a portfolio⁷. The portfolio must include:

- A letter or memo not to exceed three pages outlining professional experience and education and how the applicant views his or her learning as equivalent to that required in the CES Competencies for Canadian Evaluation Practice. In particular, this document, as well as the entire portfolio, should demonstrate that the applicant has knowledge of program evaluation theories, models and approaches, and quantitative and qualitative social science research methods.

⁵ The requirement for non-PLAR CEs is two years of experience. The six years required for PLAR aims to establish a learning period equivalent to a four-year degree.

⁶ Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making. <https://evaluationcanada.ca/what-is-evaluation>

⁷ An example of a portfolio structure is found in MacAulay, G. 2009, Taking charge of my career and life journey by plotting my direction with a Learning Portfolio. <http://capla.ca/plotting-my-direction-with-a-learning-portfolio/>

- ⊖ A full and up-to-date resumé detailing work history, making clear which positions were in evaluation, and for what proportion of time, so that the criterion of 10 years in the workforce with six years in evaluation can be assessed. Letters of validation and names/current contact information for employers/supervisors in each of these positions must be appended.
- A summary description, not to exceed two pages, of formal, informal, and professional development learning and study throughout the last 10 years. This may include training (including online), independent study, volunteering and mentorship learning, professional development events including those of evaluation associations, and others as they apply to program evaluation competencies.
- Examples of two completed evaluation work products (reports, documents, technical products) in electronic format, clearly identifying the audience and context. If these are joint or team products, the examples should include a statement of the applicant's contributions and role; and the names of employers or supervisors who can attest to the applicant's contribution.

This portfolio should be submitted by email to the Application Administrator, who will check it for completeness.

2.4.4 Assessment and approval of Prior Learning Recognition

The portfolio is then reviewed by a) two CB members with experience in assessing educational equivalencies; and b) the Vice-President. Approval of two out of three reviewers is required. This process may take up to two months. No appeal is possible. If successful, the Administrator informs the Applicant and assists him or her in moving on to the CE application process. If not successful, the applicant is provided with the reviewers' rationale.

2.4.5 Submission of the Application for the Credentialed Evaluator Designation

Applicants whose prior learning is recognized as eligible for purposes of the Credentialed Evaluator application are then free to complete the remainder of the application, as described in steps 1 through 6 of Section 2.2.2.

Once a CE application is submitted, it will follow established procedures and will be sent to two CB reviewers different from those who assessed PLAR. The PLAR portfolio will be made available to these reviewers.

2.5 Administrative Policies

2.5.1 Fees and Payment

The application fee for the CE is \$485 for processing the application within a three-year timeframe and making the decision. For those applicants providing evidence of educational qualifications under PLAR, an equivalency-assessment fee of \$550 will be charged; this includes the fees for review of the competencies component of their CE application. An annual CE maintenance fee of \$50, in addition

to CES membership fees is required to sustain the designation once awarded. These fees may be reviewed and set by CES National Board as part of ongoing financial management of the Society.

The CES membership fee and the maintenance fee will be synchronized for administrative ease. This means that only a portion of the maintenance fee will be applied (\$4.17 per month) until the two payments are due in the same month.

2.5.2 Refunds

If the applicant wishes to withdraw his or her application prior to a CB review, he or she will receive a refund minus a \$50 administration fee. If the application is under review by the CB, there is no refund.

2.5.3 Appeals

An unsuccessful applicant may appeal the decision of the Credentialing Board within 30 days of being informed of a decision. The grounds for appeal and any supplementary material are submitted to the Administrator, who acknowledges receipt within existing service standards. There is no additional cost to the applicant who seeks an appeal.

The Appeals process is a repeat of the CB's decision-making procedures except that it does not involve any of the original reviewers. In other words, the original application undergoes a second review by different reviewers. This is distinguished from a re-submission, where the applicant revises the application based on feedback and/or acquisition of further knowledge and experience. The appeal decision will be final and rendered in writing to the applicant by the Vice-President/CES PDP Lead in accordance with the service standards. Only one appeal is allowed for each new application. If the appeal is not successful, the CES member will be encouraged to reapply. Full fees will be charged for the new application. There is no limit on the number of times that a person can submit a new application.

2.5.4 Extensions

An applicant has three years to complete his or her application. In the case that unforeseen personal or professional events prevent the completion of the application and the applicant wishes an extension, the applicant will email the Administrator who will notify the Vice-President/CES PDP Lead. The Vice-President/CES PDP Lead will make the decision for a one-time extension (or not) and for how long, based on the specific circumstances. The default extension is for three months but may be adjusted to circumstances. If the extension is requested for up to three months, there is no cost. If the extension is requested for a period beyond three months there will be a \$100 extension fee.

If an application is incomplete after two years and 10 months, the Administrator will try to contact the applicant to remind him or her that the application has not yet been completed. If no extension has been requested or granted, and it is still incomplete after the three-year period, it will be removed from the database. If applicant subsequently decides to pursue an application, he or she will pay the full fee and re-submit.

2.5.5 Transferability

There may be cases where an employer has sponsored an application for a CE candidate. If that employee transfers into another position, leaves the organization or does not wish to pursue the credential, the sponsor or the applicant must notify the Administrator. The organization may have another suitable candidate that they wish to put forward. If this takes place *before* the CB review, there is no cost. The fees will be transferred to the new applicant's account. If the review is underway, no transfer is permitted and the new candidate will have to submit the necessary fees.

2.5.6 Privacy and Confidentiality

Applications are held in strict confidence. Only the Administrator and CB reviewers will view information from the applicant although there may be cases where the Vice-President/CES PDP Lead (or designate) may review an application for CB quality control purposes.

If an application is discussed outside of a review (e.g., for making a policy-type decision), names and identifying information is erased. Only the Administrator, Vice-President/CES PDP Lead and reviewer are aware of the applicant's name. His or her CES membership number transfers their information to reviewers. Upon signing the statement of work experience during the application phase, the applicant agrees that the reviewer has the right to verify information from the referees.

In the event that the applicant has applied for a position where a CE is a requirement, or is in a position where a CE has been sponsored by the employer, if the employer calls the Administrator to verify that the process has been undertaken, or is underway, the Administrator will not confirm the application until the applicant has given permission via email. The Administrator will provide the results of the application only to the applicant, the Vice-President/CES PDP Lead or the assigned reviewers.

2.5.7 References and Letters of Attestation for CEs

The CB and Vice-President/CES PDP Lead do not provide letters of reference for CEs (for example, to potential employers of university admissions offices) within the scope of the PDP program. Upon request, they may provide a letter of attestation explaining the credential, the rigor of the process, and the elements of a review, and point the requester to the Public Roster of CEs.

2.5.8 Misrepresentation on Application

CES may revoke the designation of any person who has made any material misrepresentation of fact in any application for credentialing or any document submitted in connection with such application. Such actions are at the discretion of the CES President and Vice-President.

Chapter 3: Responsibilities of a CE and Maintenance Requirements⁸

3.1 Responsibilities

By carrying the CE designation, the Credentialed Evaluator agrees to:

- maintain the Credential through continuing education and on-going learning, to help ensure that the Program contributes to strengthening the competency of the evaluation workforce over time, and ultimately that the Program contributes to the quality and utility of evaluations;
- follow the CES Code of Ethics;
- support the mandate of the CES through continued membership or joint membership with one of its affiliated evaluation associations.

3.2 Requirements and Eligible Learning Activities

3.2.1 Maintenance requirements

The CE designation is awarded for three-year periods. In order to maintain their credential, CEs must demonstrate that they have:

- completed at least 40 hours of eligible continuing education since their last renewal date. Under the auspices of the CES' PDP, continuing education is defined as an on-going approach undertaken by the evaluator towards improving and refining his or her effectiveness in fulfilling the competencies for Canadian evaluation practice.
- held continued CES membership (see section 2.4.1) paid the annual fee for the credential of \$50.
 - CES Fellows are exempt from the annual membership fee but must continue to pay the annual CE fee.

CEs' three-year cycle begins upon notification, and their renewal date is the three-year anniversary of the award.

3.2.2 Eligible Learning Activities

The present Continuing Education Requirement guidelines identify eligible categories for learning activities. To ensure continuing education across all competency domains, utilization of more than one category of learning activity is encouraged but not mandatory. CEs are encouraged to seek high quality and up to date activities that, where relevant, are organized, sponsored or led by formally recognized organizations (e.g. CES, AEA, EES, RELAC, IDEAS, IPDET) or institutions (e.g. a university).

Criteria for determining whether learning activities can be counted toward the 40-hour requirement are:

1. The learning activity is relevant to the CES Competency Domains and the connection must be indicated by the CE when reporting.

⁸ Approved by CES Board of Directors, June 14, 2014

2. The learning activity has a stated or stateable learning purpose
3. The CE has an intentional learning objective in mind for the activity and achieved it.

Eligible categories include:

- **Conference attendance**
Attendance at plenary, paper, panel and other sessions at professional conferences, for example: CES Annual National Conference, AEA Annual National Conference, other evaluation societies' conferences, other conferences with directly related subject matter. Attendance at a conference is usually counted as 5 hours per day.
- **Workshop, course and other organized learning event attendance (half a day or longer)**
Facilitated and structured learning activities undertaken through in-person or online learning workshops, courses, or other organized learning events, with clear learning goals or outcomes, for example: workshops offered by local CES chapters, workshops offered by other professional associations, The Evaluator's Institute sessions, workshops offered pre- and post- conferences (e.g. CES, AEA, EES, RELAC, IDEAS). This also includes attendance at university or college courses.
- **Short learning event attendance (less than half a day)**
Facilitated and structured learning activities undertaken through in-person and on-line learning events, with clear learning goals or outcomes, for example: webinars, breakfast sessions, brownbag ("lunch and learn") sessions.
- **Development of learning activities for others and learned writing.**
Research, analysis and preparation of a workshop, seminar, presentation, university/college course, article, book chapter, or other writing on evaluation, for example: background reading, determination of appropriate content, development of learning materials, preparation of speaking notes, drafting of article or chapter.
- **Self-Directed Learning**
Learning which occurs through informal mechanisms determined and/or organized by an individual or group not aimed at the production of tangible outputs (such as training or writing), for example: learning circles, journal clubs, independent attentive reading of professional or academic literature.

3.2.3 Process

The CE's participation in professional learning is to be recorded in the CE maintenance on-line system. With the awarding of the credential, sign-in instructions to the CE maintenance website are provided in the notification letter sent by the Vice-President/CES PDP Lead. Upon the notification of the approval of the CE, the new CE should begin logging maintenance hours in the online system. It is CE's responsibility to keep up with their records maintenance by logging in and documenting their learning activities. They have three years to gain and record at least 40 hours in learning activities.

The Administrator communicates with CE's annually to advise them of the status of their learning hours: specifically, 12 months, 24 months and 35 months after the date of their award or last

renewal. The communication summarizes hours already entered and hours left to enter, by the renewal date; and whether or not their CE renewal fee is up to date.

As part of the professionalism that the Credential signifies, the learning requirement system relies on the integrity of CEs to assess their own level of learning acquired within continuing education activities and to log hours that have genuinely contributed to maintaining or developing their competencies in the CES Evaluation Competency Domains. CEs cannot “bank” hours and have them apply to the next cycle: every three-year period they must accumulate 40 hours within that period. CEs are encouraged to record all PDP hours in each cycle if they have accumulated more than 40.

3.3 CE Status: Non-Compliance, Resignation, Expiration, Cancellation and Re-instatement

If the CE has not entered his or her 40 hours by the end of the 36-month CE period, he or she is automatically notified of the opportunity for – and must advise the Administrator of his or her intentions to use it – an up-to-six months grace period. These CEs (who retain their status until renewal or the end of the grace period) may then enter hours that occurred during the three prior years or the six-month window. Reminders will be sent about the grace period deadline. However, once the hours have been submitted, the CEs maintenance period reverts to what it was originally: the CE now has three years less the grace period used to accumulate the next 40 hours.

Extensions may be granted to the grace period on the same basis as for the regular maintenance period, due to unforeseen personal or professional events that prevent the fulfillment of the maintenance requirement even within the grace period. The Vice-President/CES PDP Lead will make the decision for an extension (or not) and for how long, based on the specific circumstances. The default extension is for three months.

CEs who are non-compliant with the maintenance requirement are given the opportunity to indicate whether or not they wish to retain their CE status. The following categories and actions will apply:

- **Resigned:** Those who indicate they wish to resign their status will be removed from the public roster.
- **Expired:** If a person remains non-compliant with their maintenance requirement at the end of the grace period, their CE designation is considered to be expired. Those who do not have any communication with the Administrator or the VP by the end of the grace period will be informed that they will be removed from the public roster, and this will be executed: they will be termed expired CEs and can no longer use the CE designation behind their credentials. All data on resigned / lapsed CEs will be retained in the system in case of a) exit surveys or b) desire for reinstatement. The “expired” period lasts for two years from the end of the grace period.
 - o In addition to the automatic letters sent by the PDP system, the VP and Secretariat will try to reach each expired CE personally to try to understand their situation.
 - o Expired CEs may be eligible for reinstatement (see below.)
- **Cancelled:** If there is no further communication from the CE by the end of the expiration period; i.e., 30 months after the last renewal date, the person’s CE status is cancelled, their data are removed from the system, and they will have to re-apply. Reinstatement is no longer possible.

Reinstatement

A former CE who did not formally resign but whose status was considered expired because he/she did not pay the annual fee or complete the required maintenance activities may request reinstatement without having to re-apply for the CE. This provision would normally apply in situations where a CE has taken a secondment or position not involving evaluation work and is now returning to the field. It is predicated on the former CE demonstrating that he/she has maintained the required competencies. Such requests can be made within two years of the date of the end of the last CE renewal date. Beyond that date, the former CE must reapply. Further, for the first 12 months following the request for reinstatement, the former CE will be on probationary status – to allow time to ensure that he/she has indeed re-entered the evaluation field.

To be considered for reinstatement, after one year of return to work in the evaluation field, the former CE must provide a letter outlining the activities over the intervening non-CE period and evidence of competency maintenance, such as a recent report or publication. This material will be reviewed by two CB members, who will make a recommendation to the Vice-President/CES PDP Lead. There will be a \$100 processing fee.

Chapter 4: Credentialing Board Responsibilities, Operations and Appointments⁹

4.1 Responsibilities

Credentialing Board Members

The CB acts on behalf of National Board by implementing the PDP program. They are tasked with making fair, timely and objective decisions on applications and appeals for the designation using guidelines and criteria established by CES National Board. Their participation provides for meaningful and substantive input into the on-going management and development of the CB part of the PDP. CB members act as ambassadors for the CES and the PDP in professional exchanges within the evaluation community (domestically and internationally). There are a number of tasks assigned to CB members.

Under the direction of the Vice-President/CES PDP Lead, the CB renders decisions on applications for professional designations and provides advice to the Vice-President/CES PDP Lead on the design and management of the PDP. To fulfill this mandate, the CB members:

- Respond to the call for an application review;
- Review applications to determine any concerns or conflicts of interest (see below);
- Complete reviews within the timeframes set out in the service standards;
- Provide clear and specific written comments in the competency section to assist the applicant in the event of a non-pass in a competency;
- Hold the applicant information as confidential;
- May consult with the second reviewer on an application file;
- Notify the Administrator of the status of applications;
- Seek guidance from the Vice-President/CES PDP Lead or Administrator as needed;
- Bring forward policy or procedural issues to the attention of the CB or the Vice-President/CES PDP Lead;
- Participate in discussions on the list-serve;
- Attend conference calls and in-person meetings as able;
- Vote on policy decisions presented on the list-serve;
- Are fluent in the language in which the application is written;
- Remain a CES member and a CE throughout their term;
- Continue their CE maintenance throughout their tenure;
- Follow the CES service standards for program delivery;
- Agree to provide a biographical statement and photo for the CES website.

Conflict of interest must be stated in cases where the applicant is a family member / relative, close professional associate, student or from an organization where the CB member serves / works, or is negotiating or has prospective employment, contracts or other such associations. CB members are expected to decline applications where a real or perceived conflict of interest may be present due to personal or professional relationships.

National Vice-President (CES PDP Lead)¹⁰

⁹ Chapter 4 stands in lieu of a Terms of Reference for the Credentialing Board

The National Vice-President is responsible for overseeing the development of the PDP, its practices and liaison with National Board regarding the CE, specifically:

- Developing and carrying out an annual Action Plan for the PDP linked to the CES Strategic Plan;
- Developing and overseeing the budget for the PDP;
- Providing guidance or requesting services to personnel involved in operating the PDP;
- Ensuring communications among CES Executive, National Board of Directors, and stakeholders, including acting as liaison between the CB and National Board;
- Facilitating alignment between the PDP program and professional learning activity throughout CES, including:
 - Representing the PDP on the CES Professional Learning Committee, including working closely with the Director of the e-Institute
 - Representing CES on the CUEE
 - Ensuring visibility of linkages to the CES Competencies and/or the PDP in all CES (national, including the Annual Conference) and chapter professional development activities
- Managing the Credentialing Board, including
 - Requesting and gathering the input of the CB on the operations of the PDP.
 - Moderating the discussions of the CB members as issues arise.
 - Arranging for and chairing teleconferences and in-person meetings.
 - Ensuring that the CB is comprised of the members that it needs to fulfill its mandate.
 - Presenting a slate of new CB candidates to CES National Board.
 - Keeping the CB informed of trends and issues.
- Attending to any other issues related to the PDP.

Applications Administrator

The Applications Administrator reports to the Vice-President and handles the following tasks:

- Communicates with prospective applicants, applicants and CEs, providing them technical guidance through the PDP and maintenance processes;
- Informs the applicants who are not eligible to proceed with an application and provides them with information on eligibility;
- Manages the on-line application system and creates new user profiles for new applicants;
- Ensures reminders are sent to CEs on the maintenance requirements and renewal;
- Coordinates the review tasks of the CB making every attempt to distribute work across the full CB, and monitors the service standards;
- Provides information to the Vice-President regularly through monthly statistical reports as well as ad hoc and CB review decisions;
- Seeks guidance from the Vice-President as needed for non-routine decisions;
- Follows the CES service standards for program delivery;

¹⁰ Future re-organization of the CES National Board may see evolution in the Vice-President's mandate. In this document, when relevant, the term "CES Lead for the PDP Program" is used, in case in the future that role is not invested in the Vice President.

- Facilitates the maintenance process to ensure that the maintenance requirements are met and CE annual fee payment has been made;
- Receives invoices prepared by CB members, validates the information and sends them to the Vice-President for approval;
- Arranges for the orientation and shadow review process of new CB Members.

4.2 Administrative Policies for CB members

4.2.1 Reporting Relationships

Members of the CB are accountable to the Vice-President and the Vice-President acts as liaison to the National Board. Members of the CB may call upon the Administrator for various tasks and queries. The Vice-President may ask the CB for advice on issues of interest to CES National Board regarding policy or procedures from time to time; recommendations are presented to National Board through the Vice-President. Questions from National Board to the CB are channeled through the Vice-President.

Working Groups of the Credentialing Board may be formed as required to advance the program or policy. These Groups report to the CB on specific, time-bound mandates, for decisions by the CB. Membership in these groups may include CEs who are not CB members.

4.2.2 Composition

The CB comprises a minimum of ten members and a maximum of 25 members appointed by the CES National Board of Directors.

Board Member Status

Not all Board members are active at the same time, nor do they play the same roles on the Board. They can be classified as:

- Active: The Member is actively reviewing applications, PLAR assessments, and/or reinstatement applications.
 - a. Members may decline reviews if their schedule does not allow completion of a review within the service standard, and may remove themselves from active status when necessary to meet professional or personal obligations.
- Advisory: The member sits on the Board in an advisory capacity and does not review applications.

4.2.3 Term and Extension of Term

The term of appointment to the CB is three years. Appointments may be extended no more than twice, and no member may serve for more than nine years. Members must sign the Declaration of Membership to the Credentialing Board upon accepting their positions, where they attest that they will:

- Abide by the CES Guidelines for Ethical Conduct;
- Keep strictly confidential privileged information received by the Board;

- Abide by the Credentialing Board’s Policies, Procedures and Guidelines; and
- Remain knowledgeable and aware of the Competencies for Canadian Evaluation Practice, Program Evaluation Standards, and program principles.

At the end of each three-year term of a CB member, the Vice-President contacts each member to confirm their decision to renew or end their mandate.

In the event that CB members must absent themselves for a substantial period of time due to unforeseen events, they may either offer a resignation to the Vice-President or request that their CB duties be deferred for a specific period of time. The Vice-President will make the decision for the deferment based on the needs of the CB at that time.

4.2.4 Orientation of New Members

The Vice-President with the assistance of other CB members is responsible for the coordination of the new members’ initial orientation and training including the shadow review process. The Vice-President ensures that training is available to new members so that they understand the CB structures and procedures and the credentialing process. It is the responsibility of the new member to become familiar with the guidelines prior to a shadow review, and to ask clarification where necessary. The first two credentialing reviews in which the new member participates are as a shadow reviewer. An experienced CB member is asked to review the application analysis criteria with the new member and to conduct the two shadow reviews of active PDP applications. The CB member is available for consultation during the shadow review process. The PDP application is examined closely with the CB member/coach to ensure that the shadow reviewer is consistently reaching the same decisions as the official reviewers and is appropriately applying the CES Credentialing Board Guidelines for Review. The experienced CB member is responsible for the review and assessment of the PDP application under review.

The Administrator manages the new member orientation process and assigns the new CB member to experienced CB members/coaches. The CB member notifies the Administrator on the results of the shadow review process with the new CB member. The Vice-President oversees the process and confirms that the new member is prepared to conduct individual PDP application reviews.

At the time of updates to the CES Competencies, the Administrator assists the Vice-President in arranging briefing and calibration sessions of the entire CB.

4.2.5 Votes

Advice to CES National Board is adopted by a majority vote of CB members. A quorum of 10 CB members is required to hold a vote. The Vice-President is tasked with transmitting such advice to CES Executive or National Board with the results of the majority vote. The advice to the CES National Board offered by the CB is not binding.

4.2.6 Communications and Meetings

Not less than once a year, the Vice-President asks CB members to identify PDP issues of policy or procedure and to provide advice or recommendations. Discussion of these items takes place through an electronic forum where all CB members are asked to articulate their analyses and opinions, and through teleconference meetings of the CB.

To the extent necessary and possible, one in-person meeting with teleconferencing abilities of the CB is held during the annual CES conference to discuss such issues of policy or procedure.

4.2.7 Compensation

Being a CB member entails a commitment of personal time and, in some instances, funds. Members are entitled to an honorarium-type per diem, based on the level of effort expended and the volume of CB applications processed. The honorarium rate is reviewed by the Vice-President and CES Executive Committee on a three-year cycle. The current rate is \$150 per review plus applicable taxes. Other expenses must be pre-approved by the Vice-President prior to being incurred. Time spent in CB meetings and in committee meetings and work is understood to be on a volunteer basis.

4.2.8 Resignation

CB members who are unable or unwilling to continue in their role and wish to resign before the end of their term are required to notify the Vice-President in writing or by email, so that a suitable replacement candidate can be recruited and work can continue.

4.2.9 Program Service Standards¹¹

The credentialing program is committed to delivering prompt, precise, fair, effective and efficient service to CES members. The expectations for efficient and timely handling of applications are as follows.

Activity/Process		Service Standard
1	All dealings with applicants	With equal speed and quality in English or French
2	From receipt of a submitted application to acknowledgement by the Application Administrator (AA) and information on the process	5 working days
3	From acknowledgement of an application to attribution to reviewers	5 working days

¹¹ Adopted by CES Board of Directors on September 14, 2013

4	From attribution to completed review by a CB member (initial review or third review; initial application or appeal)	15 working days
5	From finding of a split review to attribution to a third reviewer (initial application or appeal)	5 working days
6	AA follow-through on actions approved by the CB (negative decisions to the applicant, positive decisions to the VP-PDP) (for initial applications as well as appeals)	5 working days
7	From receipt of an appeal to acknowledgement by the AA and information on the process	5 working days
8	From acknowledgement of an appeal to attribution to reviewers	5 working days
9	Acknowledgement of receipt of any communication	1 working day
10	Official reply to any communication	5 working days

4.3 Credentialing Board Appointments

At the outset of the Professional Designation Program, it was decided to populate the initial Board with recipients of CES Awards: Award for Service to the CES, Award for Contribution to Evaluation in Canada and Fellow of the CES. This was understood to be a proxy for the desired qualifications of CB members: senior, respected Canadian evaluators visibly committed to improving the profession. Additional members were added in the spirit of these criteria by nomination and vote of the CB. This document described the process and criteria for CB appointments going forward.

4.3.1 Credentialing Board Composition

Board composition will be considered in its entirety when selecting members.

- As a core principle, the composition of the CB must reflect the diversity of the membership of CES and the field. Consideration must be made to seek and support candidacies who bring unique perspectives from diverse linguistic, cultural, ethnic, gender or Indigenous points of view.
- Diversity also requires that the Board has a combination of members whose expertise reflects different evaluation approaches, sectors (consulting, government, NGOs), educational disciplines (economics, political science, public administration, etc.), and functional areas of practice (education, environment, health, etc.).
- Members from as many chapters and regions of Canada as possible should be included, with adequate capacity to review applications in both official languages.

The Board members will have taken or will undergo diversity training appropriate to their role.

4.3.2 Qualifications of individual CB members

To be considered as CB members, the following are mandatory requirements:

1. Credentialed Evaluator for at least five years and therefore be a current CES member.
2. Senior evaluator with at least 15 years of experience in the field. This may have been gained through a combination of: conducting, managing or supervising program evaluations; publishing, teaching, and/or advocating.

The Selection Committee has the authority to accept nominations and recommend individuals who do not fully meet these criteria in order to enable appropriately diverse composition of the Board as a whole.

The Selection Committee members will have taken or will undergo diversity training appropriate to their role.

4.3.3 Selection Committee

With the assistance of the Application Administrator, the Vice-President convenes a Selection Committee to screen candidates and to recommend its selection to the CB. The Selection Committee is composed of two current Credentialing Board members, the Chair of the CES Diversity Working Group or its designate, and a representative of CES National Board (appointed annually). It is chaired by the CES Board Lead for the PDP (non-voting).

4.3.4 Nomination Process

Coordination. The nomination process is coordinated by the CES Board Lead for the PDP. It is a rolling annual process, informed by the confirmation of existing CB members to renew or end their mandates, as well as the end of maximum mandates, with the goals of:

- a) maintaining up to 25 and no less than 20 active members on the CB at all times, and
- b) ensuring continuity by changing no more than 50% of CB members annually.

Targets. Based on analysis of the current and needed Board composition, the Selection Committee sets targets for new CB members reflecting all dimensions of desired Board composition. The number of new CB members recommended will be determined by the need in that current cycle, to arrive at no more than 25 and no fewer than 20 active CB members.

Applications. A Call for Applications, mentioning the current needs in terms of numbers of CB members to be appointed and diversity composition, is, once per year, a) posted on the CES website as a news item, and b) sent to Chapter executives, National Board and the Credentialing Board, with a deadline. These communications describe the application process, the CB members' terms, responsibilities and activities, and the selection criteria.

A person may self-nominate. In addition, the Call for Applications is supported by proactive solicitation through: Chapter executives, National Board and the Credentialing Board. Members of all of these are encouraged to solicit expressions of interest from their membership or approach persons that they feel would be appropriate, keeping in mind the diversity needs and aims of the current solicitation.

Chapter executives, National Board and the Credentialing Board are charged with actively seeking out, soliciting interest from and supporting candidates from minority and under-represented populations, communities, sectors and approaches. Chapters and the National Board are encouraged to link this active solicitation to analysis and action plans for diversification of membership at governance at their levels.

Application submission. To verify eligibility in terms of date of CE award, interested individuals or those soliciting interest may contact the PDP Applications Administrator. Eligible applicants must then send the following documents to CES National Operations Manager, by a specified date:

- Completed cover sheet documenting identity characteristics for diversity purposes;
- Current CV;
- Maximum two-page letter describing:
 - o interest in being on the CB;
 - o depth and scope of evaluation knowledge and experience;
 - o contribution to increasing quality of evaluation in Canada; and
- Letter of reference from a current CES member.

Assessment and selection. The Selection Committee uses an appropriate selection rubric and a documented, confidential process to assess applicants' qualifications in the context of overall Board composition. (The cover sheet and rubric will be developed by the 2019 Selection Committee and appended to the current Operational Guidelines.) It selects applicants to recommend for appointment.

Appointment. The CB is notified of the recommended selected candidates. Their CVs are made available on the CB Discussion Forum. A vote is held to formalize the CB recommendation. The National PDP Lead presents the result of the vote to the National Board for consideration and approval.

Credentialing Board members are appointed by the CES National Board, upon recommendation of the Credentialing Board Selection Committee.

Notification. CES President informs the successful applicants of their appointments. The CES Board Lead for the PDP informs the unsuccessful applicants and provides feedback on their nomination if requested, with an eye to encouraging re-nomination in a later year if appropriate. The President acknowledges the candidates nominated by CES chapters and notifies the Chapter Presidents of results prior to public release.

New CB members are announced in the CES news blast, with a link to their bios on the CB site.

Appendix 1: CES Professional Designation Program (PDP): Self-Assessment Checklist for those considering application to become a CES Credentialed Evaluator

	Yes	No	Uncertain
I am a member of CES.			
I have a graduate degree <u>or</u> an undergraduate degree and a certificate/diploma in evaluation.			
My postgraduate degrees/diplomas/certificates are from recognized Canadian postsecondary institutions or from non-Canadian universities ranked among the top 500 in the world.			
If I do not have a graduate degree <u>or</u> an undergraduate degree and a certificate/diploma in evaluation, I have been in the workforce for at least ten years, of which six have been full time in evaluation.			
I have taken at least one course/workshop in Program Evaluation. (not a requirement but a recommendation).			
I can clearly articulate program evaluation, and I am familiar with the definition of Program Evaluation as described by the Canadian Evaluation Society (CES). https://evaluationcanada.ca/what-is-evaluation			
I am familiar with the Canadian Evaluation Society Ethics. https://evaluationcanada.ca/ethics			
I am familiar with the Program Evaluation Standards. https://evaluationcanada.ca/program-evaluation-standards			
I am familiar with the Competencies for Canadian Evaluators. https://evaluationcanada.ca/competencies-canadian-evaluators			
I have reviewed other CES resources that help explain the PDP and the CE on the CES web site (webinars, video clips, journal articles, and others). https://evaluationcanada.ca			
I am aware that I can complete the eligibility requirements and apply online.			
Program evaluation has been on my job description or has been the focus of my graduate courses.			
I have a current CV that describes the contexts in which I obtained my required two years of program evaluation experience.			
I can document two full-time years (equivalent) of program evaluation-related experience in the last ten years, validated through professional references.			
I can obtain or have obtained a statement of program evaluation work demonstrating the required two years' of experience and signed by my sponsors/references.			
I am aware of the application fee and the annual fee to maintain my designation.			
If I do not have a graduate degree <u>or</u> an undergraduate degree and a certificate/diploma in evaluation, I have been in the workforce for at least ten years, of which six have been full time in evaluation.			
I can document that I have competence in at least 70 percent of the competencies in the five domains.			
I am aware that I can contact a CE in my Chapter to ask for advice or mentoring. https://evaluationcanada.ca/roster-credentialed-evaluators			
If I am not successful in obtaining the credential on my first application, I am			

aware that I can address my shortcomings and reapply as many times as I wish within three years of my first application date.			
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