Abstract: The Credentialing Board is a group of senior evaluators whose role is to consider the merits of each application for the Credentialed Evaluator designation and to provide input regarding the ongoing development of the program. This article recounts the four-year history of the Board, describes its processes, and analyzes its challenges. On the basis of a file review, a survey of Board members, in-depth interviews, and the authors’ own experiences, it is concluded that the Board has successfully tackled its responsibility but that there is still room for improvement.

Keywords: applications, CE decisions, Credentialing Board, professional designation, review process


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In May 2010 at the historic Empress Hotel in Victoria, British Columbia, the Credentialing Board (CB) of the Canadian Evaluation Society (CES) held its first meeting. As senior evaluators, colleagues, and new Board members, we filed into the conference room looking at each other with interest and trepidation. We had many questions: What was expected of us? How would the assessment process unfold? Would the Credentialed Evaluator (CE) designation be a success? What exactly were we getting ourselves into?

Thus began the four-year journey that has brought us to the preparation of this article. As original CB members, we have welcomed this opportunity to see where we have been as a Board and to consider what may lie ahead.

**METHODOLOGY**

Data reported in this article were obtained using a variety of methods.

- The Professional Designations Program (PDP) database was searched for information on the demographics of the CB, the history of Board membership, the workload, and the number of awards made.
- A survey of CB members was conducted to document their perceptions of challenges, successes, and tasks. Of the 32 past and present Board members, 21 (66%) completed the survey; 11 were in their second term, 6 in their first term, and 4 had left the Board.
- A file and document review about the CB since inception was conducted. The online member forum was searched for a variety of administrative topics.
- Individual telephone interviews were conducted with the 7 CB members who volunteered in the survey to provide further input.
- The former Application Administrator who had supported the program for three years was also interviewed.
- The memory and personal files of the four authors helped to ground our perspective.

**Limitations**

These sources provide a series of viewpoints on the CB as an object of observation and analysis. Because many are perceptual in nature, the authors tried to cross-validate observations and conclusions. As the program management database was not designed to provide some of the information that we sought, it proved to be a limiting factor. For example, we could not document the length of time required to process each application. Finally, as both researchers and informants, we attempted to distance ourselves from the object of our inquiry and yet felt...
compelled to complete the very survey that we had designed because we wanted our voices to be heard as well.

OVERVIEW

Five topics are addressed in our article. We describe the Board’s role and its membership, the training process for both initial and new members, the application review process, and the outcomes of that process. Finally, Board member perspectives are explored.

BOARD ROLE AND MEMBERSHIP

The CB is one of the operational structures of the CES Professional Designation Program (PDP). It consists of a group of senior evaluators whose role is to consider the merits of each application for the Credentialed Evaluator (CE) designation and to recommend its acceptance or rejection. In addition, the Board provides input to Council, the governing body of CES, regarding the ongoing development of the CE program, and it supports the recruitment of new CB members. All nominees are ratified by a vote at Council. Members have a three-year term which is renewable twice for a possible total of nine years. Up to July 1, 2014, the responsibility for Board supervision rested with the Vice-President, Professional Designation Program (VP-PDP). Thereafter, the CES National Vice-President took on this role.

In accordance with the Credentialing Board Terms of Reference and Guidelines (CES, 2010c), the initial 24 Board members were recruited from the ranks of CES National Award winners and CES Fellows. As they needed to have the credential themselves before they could award it to others, they received the CE designation through a grandparenting process.

At the end of the first three-year term, five members resigned and one became the new VP-PDP. The retention rate was high, as 79% of the original board (18 members) continued into a second term. Eight new members were drawn from the pool of National Award winners and Fellows. As more candidates were required, particularly those with bilingual capabilities, Council requested that Board members nominate some colleagues with strong French language skills (CES, 2014). Four additional members were identified and subsequently ratified, making the current total 30 members.

Membership is evenly split between men and women, an interesting statistic when viewed in the context of the evaluation profession as a whole. In Canada, repeated surveys have shown that the membership of CES is upwards of 70% female.

Our survey results provided some information about the 21 survey respondents (66%):

- 52% are aged 60–69; 33% are 40–59; and 14% are 70 or older.
- Respondents have on average 28 years of evaluation experience (range 14–45 years).
They have been members of CES for 24 years on average (range 12–33 years).

62% hold a doctoral degree; 38% have a Master’s degree.

Their disciplines vary: 19% in psychology; 19% in education; 14% in economics; 24% in other social sciences; 5% in business administration; 5% in public administration; 5% in mathematics; and 10% in other fields.

76% are consultants (or were before they retired); 18% work for government; and 6% are in education.

To summarize, the typical CB member is an established evaluation practitioner with an advanced degree in the social sciences. He or she has more than a quarter-century of experience, primarily in the private sector.

**BOARD MEMBER TRAINING**

An online forum was established for Board communications and several documents were posted there, including the *Terms of Reference and Guidelines* (CES, 2010c), the *Competencies for Canadian Evaluation Practice* (CES, 2010a), the *Applicant Guide* (CES, 2010b), the CES privacy policy, and sample applicant narratives. The members signed a declaration form stating that they would abide by these documents in their role as CB members.

A critical concern for the new Board members was review consistency, and so this became the focus of their training. A mock application was posted on the forum, and the members reviewed it using an online survey to record their award decisions. Then a teleconference training session was held to discuss the review. Perhaps it is no surprise that the call elicited vigorous debate among these experienced evaluators. Some members had different expectations of what constituted applicant experience; others wanted more substance in the applicant’s competency narratives; still others wanted clarification about various competencies themselves. The discussion was substantive enough to warrant a series of additional calls over the following month. Notes from each session were posted. A final cumulative set of meeting notes was compiled, which became an important permanent record and training document. After members began to complete their own reviews, they had further questions, and an additional call was held in the fall of 2010 to review another mock application.

The training was judged to be quite effective by two thirds of survey respondents, 70% felt clear about their role as a reviewer, and a similar proportion believed that they understood what evidence of education and experience was required for an award. Interview comments supported these findings on the training process, although one person noted that “experience was the best teacher.” Still it was observed that not all issues about the interpretation of evidence had been resolved. Some members wanted more training on “making the judgement call,” and it was suggested that a more formal calibration of reviewer perspectives was necessary.

After the initial training period, limited interaction occurred among the reviewers apart from the brief annual general meeting at the CES conference.
Sporadic discussions also appeared on the online forum, but these were often related to a member's particular topic of interest. Generally the episodic and ad hoc nature of this type of communication worked for many of the members. A majority (75%) of survey respondents indicated that they were satisfied with Board communications. However, at least one interviewee found the transmissions to be “quite irritating.”

When several new members joined the Board in the fall of 2013, the Applications Administrator and the VP-PDP organized their training. The new members were paired with experienced ones for mentoring. They reviewed and discussed the same application but, as it was a training exercise, the new members were shadow reviewers and their decisions did not apply to the credentialing decision. Subsequently, the mentors remained available for consultation, particularly for the first two reviews conducted by the new members.

The Board members made several recommendations in their interviews about the mentoring process. Some emphasized the importance of more thorough training, suggesting a broader range of examples, more formalized mentor/mentee roles, more definition about what constitutes reasonable evidence, and broader discussions with the full Board.

**THE REVIEW PROCESS**

The online application process is managed by the part-time Application Administrator. She checks each application for completeness and obtains any missing information before forwarding the application to two members for independent review. They log into the CES PDP website and review the applicant’s reference letter(s), evidence of educational qualifications, and descriptions of how the applicant has used selected competencies.

The applicant must obtain a positive rating of 70% of the identified competencies in each of the five domains. A summary of the reviewer’s ratings with respect to educational, experience, and competency requirements is automatically generated at the end of the application. If the applicant has demonstrated relevant education, experience, and use of competencies, the reviewer recommends that the CE designation be awarded. On the other hand, if the reviewer feels that the applicant has not demonstrated an acceptable level of competency use, or if their education or experience are lacking in some way, further preparation by the candidate is required. If the recommendations of the two reviewers differ, the application is sent to a third reviewer and the majority recommendation then prevails.

A review of the PDP database revealed that the number of applications reviewed by individual Board members has varied considerably. Since the inception of the designation, the average number of reviews per member is 16; however, the range is between 0 and 67 reviews. Three members have individually performed over 40 reviews. More typically, active reviewers have conducted between 10 and 40 reviews, but six reviewers have not conducted any reviews. Some of the members who have left the CB cited lack of time, suggesting that they may not have...
been aware of the extent of the commitment involved. Survey results indicated that reviewers spent an average of 2.4 hours per application.

After the initial round of applications had been reviewed, the CB decided to increase uptake and instituted the Fast Track, an additional application process that was available for one year. It allowed evaluators with substantial experience to submit a shorter application that focused on their curriculum vitae and a description of their competencies as demonstrated in one evaluation project. Fast Track applications took significantly less reviewer time, an average of 1.3 hours per review.

OTHER BOARD MEMBER ACTIVITIES

Board members also contribute to the work of the Board in a variety of other ways, demonstrating their strong commitment to the PDP. Nearly all of the 21 survey respondents (91%) took part in discussions on the discussion forum. Just over half (57%) attended the annual meeting at national conferences; 47% participated on a CB committee. A substantial proportion (42%) spoke publicly about the credential or gave conference presentations about the Board. Several (38%) also talked informally with potential applicants, and five members (24%) acted as mentors. Examples of other CB-related activities included involvement with the early PDP research and deliberations, liaison with the American Evaluation Association, debates regarding the CB at Canadian and international conferences and meetings, incorporating the CE criteria into teaching and workshops, and publicizing the PDP within Society chapters.

IDENTIFIED CHALLENGES

In her interview, the Application Administrator indicated that she saw the program as a success; however, she did identify a number of challenges experienced during her tenure, many of a technical nature. While the online system was designed specifically for the PDP, early problems emerged regarding lack of browser compatibility and password issues. Fast Track applicants had trouble uploading additional information as needed. For these and other related reasons, Council decided in 2013 to invest in a new online system for the PDP (CES, 2013). It should be operational early in 2015.

Other challenges related to delays in the review process. As some periods of the year are particularly busy for evaluators, there were times when it was difficult to find an available reviewer. Further, if a reviewer declared a conflict of interest once an applicant was assigned, a delay ensued while another reviewer was found. When French translation was required, there were further delays. Finally, if an applicant received an unfavourable decision, communications could occasionally become difficult and had to be passed on to the VP-PDP for resolution.

The Board members who were interviewed were generally positive about their experience. They acknowledged that their colleagues’ commitment, effort,
and engagement had been essential to making the whole process work, although some did worry about the unevenness of member participation. While open discussion among members was appreciated, some felt that decision-making processes should be more formalized. They also identified a need to conduct broader-based discussions about the overall credentialing system.

After the reorganization of National Council, when the temporary position of VP-PDP was removed, the responsibility for the PDP was transferred to the single remaining vice-presidential position. Some CB members felt that this resulted in a lack of clarity regarding Board leadership and worried about adequate representation for CB issues on Council.

**BOARD OUTCOMES**

By the end of March 2014, a total of 339 applications had been received (see Table 1: Applicant Success Rates). Over half (56%) of these were regular applications; the remaining applicants had used the Fast Track process. Of 190 regular applications, 62% were reviewed. The reason for this fairly low review rate is that candidates using the regular process have up to three years to prepare, revise, and submit their application. In contrast, almost all (144) of the 149 Fast Track applications did reach the review stage, reflecting the fact that the three-year grace period did not apply for this short-term measure.

Whether regular or Fast Track application, success rates were high: 77% of regular applications and 84% of Fast Track applications were successful upon first submission. A total of 23 regular applications (20%) were not successful upon first submission. Six of these were resubmitted with additional information, and two of them were successful.

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Regular application process</th>
<th>Fast Track application process</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications opened</td>
<td>190</td>
<td>149</td>
<td>339</td>
</tr>
<tr>
<td>Applications reviewed</td>
<td>117</td>
<td>144</td>
<td>261</td>
</tr>
<tr>
<td>Applications requiring a third reviewer</td>
<td>10 (9%)</td>
<td>17 (12%)</td>
<td>27 (10%)</td>
</tr>
<tr>
<td>Applications successful upon first submission</td>
<td>90 (77%)</td>
<td>121 (84%)</td>
<td>211 (81%)</td>
</tr>
<tr>
<td>Applications not successful upon first submission</td>
<td>23 (20%)</td>
<td>22 (15%)</td>
<td>45 (17%)</td>
</tr>
<tr>
<td>Applications resubmitted</td>
<td>6</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>Applications successful upon resubmission</td>
<td>2</td>
<td>0</td>
<td>2</td>
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*Note. Some totals do not agree because of missing values.*

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The number of awards has varied considerably from quarter to quarter since the commencement of the CE program in 2010. During the first few months, only a few CEs were awarded, but then numbers fluctuated (Figure 1: Number of CEs Awarded per Quarter). When the Fast Track method was introduced in the fall of 2011, the award rate rose substantially, peaking at the end of 2012 just before the final deadline for Fast Track applications. Since then, the rate has dropped somewhat but continues at about 10 awards per quarter.

As of March 2014, only 27 of 261 applications required a third reviewer (9% of regular applications, 12% of Fast Track applications). The initial two reviewers have agreed 90% of the time, suggesting good reliability across reviewers.

This finding was corroborated by the administrator who observed that Board members were “very often on the same page.” However, some members did express concern in the survey about the consistency of decisions across reviewers. (Readers should be aware that respondents were not aware at the time of the 90% reviewer agreement figure that is presented above.) Only 60% of respondents thought that the Board had performed well in terms of reaching consistent conclusions.

In terms of the validity of the overall review process, that is, the extent to which the process leads to awarding of the designation to worthy candidates, 70% of the respondents expressed a positive opinion. Still, only half felt a growing

![Figure 1: Number of CEs Awarded per Quarter](image-url)
confidence that they were making the right decisions. It is possible that these perceptions stem from the limited feedback they have received with respect to reviewer agreement and the ultimate fate of the application.

**BOARD MEMBER PERSPECTIVES**

In the survey the members were asked to rate their satisfaction with their role on the Board. Of the 21 respondents, 17 (81%) were Somewhat or Very Satisfied, 2 members were neutral, and 2 were Somewhat Dissatisfied. The comments of respondents suggested that, for some, being involved in the initiation and development of the credentialing system was rewarding. Some commented that they were proud of contributing to the field of evaluation in Canada, supporting a high level of professional practice, and advancing the CE designation. They appreciated working with other senior evaluators, finding the interaction to be both stimulating and inspiring.

Several of the respondents were impressed by the outstanding achievements demonstrated by some applicants, although other applicants were seen as having a disappointing lack of expertise. As one interviewee said, doing the reviews “makes the gaps in the field clear to me but I have some admiration for some strengths too. Some individuals have really put the latest thinking into their practice.” Several suggested that the review process had exerted a positive impact on their own professional development, giving them a broader view of evaluation roles and functions and reminding them of the skills and competencies they needed themselves. As one member commented, “Going through those competencies and seeing how other people use them is an amazing experience.” Some also mentioned their enjoyment in mentoring other evaluators.

The few respondents who expressed some dissatisfaction cited lack of time and availability as the main issues. A few had some reservations about the quality of the designation, the standards employed, or the application process itself, which one member described as “a writing contest.”

The members were asked what could be done to increase their level of satisfaction with their role on the Board. Most suggestions related to the improvement of internal CB processes. In particular, board communications and feedback mechanisms were seen as critical for improvement. More frequent interaction among the reviewers was recommended, including regularly scheduled conference calls and an expanded annual meeting to discuss key issues. Communications could also be improved by providing a feedback system about assessment status, such as completed reviews, additional information requested or received, whether a third reviewer was required, and the final outcome of the review. Regularly updated overall statistics were also recommended. Some reviewers wanted a way to assess how their decision compared to others. The administrator suggested that automated deadline reminders could be sent to both applicants and reviewers.

The members suggested several ways to improve the application process. It was felt that more guidelines for candidates would enhance the quality of
applications. The administrator agreed that better communication to CES members about the credential and the expectations surrounding applications would encourage better, more complete applications. It would also reduce some unnecessary question-and-answer exchanges between applicants and the administrator. Some members wanted to provide more feedback to applicants and some wanted more interaction with them. Various comments suggested that more complete applicant records should be maintained; issues of quality control, reliability, and Board evaluation needed to be addressed; and time should be devoted to stock-taking and reflection. One reviewer commented that the distribution of reviewers needed to reflect the variety of evaluators across Canada, as there was a preponderance of members in private practice. It was also suggested that more resources were needed to support a full-time administrator.

Overall the credential was seen as an important way to gain respect for the role of evaluation in the broader community. Marketing the credential was considered essential to foster its acceptance, especially by those who commission evaluations. It was also recommended that better external links be created with educators and trainers, and with annual CES conference committees, to ensure that training in the required competencies was well addressed in university programs, conference workshops, and other training programs. The continuing education of those with a CE designation was identified as a topic needing further attention. As one interviewee commented, the designation “wasn’t to be the end of our journey in professionalizing evaluation.”

When members were asked where they thought the Board would be in five years, their responses were mixed. Some suggested that the whole credentialing process was quite immature and several administrative issues still needed to be resolved. Others identified a lack of support from employers of evaluation expertise, particularly in the federal government. A concern was expressed that in time a saturation point might be achieved and that credential growth might stagnate. However, some felt optimistic that recent discussions at the Board suggested that issues were being identified and addressed.

**FINAL THOUGHTS**

We continue to be aware that the CB is the first of its kind in the evaluation world, and it is obvious that the story is still being written. Even after four years of operation, the Board is still adapting its role, clarifying operational policies and procedures, and questioning its approaches. There is a need for more communication, feedback loops, and record keeping about applicants, application status, and outcomes.

From the perspective of the Board members, the challenges have been well worth the effort. They tend to value their involvement in this important endeavour and see their experience as both rewarding and instructive. While work is unevenly distributed among them, it reflects their availability and may be the cost of continuing to engage the Society's most senior members.
Our findings suggest that some members’ lack of confidence in the consistency of award decisions is not supported by the strength of data obtained on agreement among reviewers. However, as the trust placed in the CE reviewers by applicants, CES members, and evaluation users in general is paramount, it may be worthwhile to explore this issue in a more rigorous way.

It remains to be seen if the acquisition of this basic credential will act as a stimulus to recipients to continue their professional development and education to enhance their practice. Several strategic decisions about the credentialing program will be required in the future. It is hoped that the exploration of the CB provided here will help to stimulate further discussion and development.

REFERENCES

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