From the Outside, Looking In with a Smile: 
A Summary and Discussion of CES’s Credentialed Evaluator Designation

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Abstract: Drawing upon information presented in this issue, the article discusses the CES’s Credentialed Evaluator designation using three frameworks: the Context, Inputs, Processes, and Products (CIPP) model to provide an overview of the program; developmental evaluation to examine key events and principles in the program’s evolution; and adaptive action to raise issues both for the CES as it revises the program and for others around the world as they consider the possible benefits and risks of establishing evaluator credentialing programs. The Credentialed Evaluator designation has provided proof of concept for a viable evaluator credentialing system run by a voluntary organization of professional evaluators (VOPE). Specific considerations in moving forward in settings beyond Canada include the following: (a) the exercise of caution when using evaluator competencies to structure a credentialing program, (b) the importance of a perceived need for or value of a credential, (c) skillful attention to milieu, (d) finding qualified and committed people to develop and manage the program, and (e) ensuring that all stakeholders, including those outside the profession, are involved.

Keywords: evaluator competencies, evaluator credentialing, evaluation professionalization

Résumé : En tirant des informations fournies dans ce numéro, cet article présente une discussion du titre d’Évaluateur accrédité de la SCÉ par le biais de trois cadres: le modèle Contexte, intrants, processus, et produits (CIPP) pour fournir un survol du programme; l’évaluation du développement du programme pour examiner les événements et principes clés de son évolution; et l’action adaptée pour soulever certaines problématiques, à la fois pour la SCÉ lors de sa révision du programme et pour les autres intervenants du monde entier qui évaluent les avantages et les risques de mettre sur pied un programme d’évaluateur accrédité. Le titre d’Évaluateur accrédité a démontré la faisabilité d’un système de titres professionnels pour les évaluateurs géré par une organisation volontaire d’évaluateurs professionnels (VOPE). En dehors du Canada, les éléments à prendre en considération pour aller de l’avant incluent : (a) faire preuve de prudence lors d’utilisation des compétences de l’évaluateur pour

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I teach program evaluation at the University of Minnesota. The topic of my doctoral colloquium during Winter Quarter, 1998—17 years ago—was the professionalization of evaluation. We collectively reviewed all the articles we could locate on the topic, reflecting on the progress made in the 30 or so years since the field’s launch during the 1960s. One late afternoon, following a particularly discouraging discussion of whether evaluators could ever agree on a common set of competencies—it seemed unlikely—three doctoral students (Gail Ghere and Jane Minnema in Evaluation Studies and Laurie Stevahn in Educational Psychology) stayed after class to pose a challenge: What if we developed a set of evaluator competencies? Each of them was familiar with fields that routinely used competencies: special education, early childhood education, and teacher education. If those fields could generate sets of competencies, then why not evaluation?

We took the challenge and began working together, always as volunteers, to create the competencies that started life as the Minnesota Evaluator Competencies, but were eventually labelled and published—rather boldly—as the Essential Competencies for Program Evaluators (ECPE; King, Stevahn, Ghere, & Minnema, 2001; Stevahn, King, Ghere, & Minnema, 2005). As Love (2015) and Maicher and Frank (2015) document in this issue, CES developers used the ECPE as one of the framing documents in developing the competencies that are now part of the Credentialed Evaluator (CE) Designation. The four of us could never have imagined on that wintry afternoon or during the many long hours spent around my dining room table how our efforts would one day play a role in the ultimate development of the CES system. We just wanted to see if we could develop competencies. Over a decade had passed when Laurie Stevahn and I were asked in 2009 to discuss the ECPE and our process for developing them with members of the CES Professional Designations Core Committee (PDCC) during the American Evaluation Association conference. What had begun simply as an intellectual challenge ultimately became part of the professionalization of our field.

The purpose of this article is to provide a relative outsider’s review of CES’s CE Program and one person’s perspective on its long-term implications. It presents a view across the articles included in this issue and also moves beyond them to examine the status of credentialing in evaluation generally. Times have certainly changed since we four Minnesotans innocently compiled lists of competencies.
others had proposed and sought overarching categories into which evaluator competencies of all sorts would fit. I must be clear that I write as a critical friend; I have discussed the program’s ongoing development and presented on common daises with Canadian colleagues multiple times in the past decade. I sincerely celebrate the fact that the CES has institutionalized an evaluation credential and a functional process for its attainment, bringing to life a form of credentialing in a field that has struggled to address issues of professionalization. In an effort to be thorough, three approaches will frame my review: (a) Stufflebeam’s Context, Input, Process, and Product (CIPP) model (Stufflebeam, 1983) to provide an overview of the CE “intervention”; (b) Patton’s developmental evaluation (Patton, 1994, 2011) to highlight key decision points and principles in the evolution of the CE program; and (c) a simple adaptation of Eoyang’s adaptive action (Eoyang & Holladay, 2013) to focus attention to the field’s “system” more broadly.

USING THE CIPP MODEL TO DESCRIBE THE PROFESSIONAL DESIGNATIONS PROJECT (PDP)

Since its development in the 1960s, the CIPP model has highlighted four distinct areas of evaluation focus (Stufflebeam, 1983, 2007). Detailing the context, inputs, process, and products of the CES Professional Designations Project is one way to summarize information on the project and its product, the Credentialed Evaluator Designation. The following sections will describe each of the four CIPP categories for the PDP.

But first it is important to identify exactly what the Professional Designations Core Committee created. As Gauthier, Kishchuk, Borys, and Roy (2015) describe it, “CES implemented a designation that recognizes that an individual has education and experience necessary for practicing evaluation competently in Canada” (Gauthier et al., 2015, p. 99).

Another article provides definitions that highlight the distinctions among credentialing, certification, and licensure (see Halpern, Gauthier, & McDavid, 2015). The CES designation is an innovative combination of two of these. Buchanan writes that the CE designation “credifies” evaluators, noting that the PDP’s CE model is

“somewhere between a credential and certification.” The PDP was knowingly introducing a novel approach, credify, a term that may be defined as

*Credify* (v.t.) a process consisting of 2/3 credentialing and 1/3 certification to award a professional designation. (Buchanan, 2015, p. 48)

The committee that ultimately developed the CES professional designation worked creatively in a space between formal definitions, shaping a “credifying” process and infrastructure to support it that adapted to the context in which it had to succeed.
CONTEXT OF THE PROFESSIONAL DESIGNATIONS PROJECT

The first component of the CIPP model is context. What was the context in which the PDP emerged during the first decade of the 21st century? What happened in the field in prior years that led to the decision to move forward with planning in 2007 and implementation in 2010? During the 1990s professional evaluation circles in both Canada and the USA had begun to discuss professionalization, recognizing that after 30 years of developing practice, the timing seemed right to at least consider taking formal steps to move the field in this direction (see Love, 2015). As Love (1994, p. 29) put it, “Both the American Evaluation Association (AEA) and the Canadian Evaluation Society (CES) see promoting evaluation as a profession to be a key element of their missions.” In the same issue of New Directions, Worthen (1994) stated that evaluation had clearly developed certain attributes of a profession: the need for evaluators coupled with stable career opportunities, a unique set of knowledge and skills, professional associations and targeted journals, preparation programs for training evaluators, and codified standards of practice. He also identified three attributes that the field lacked: accreditation of training programs, a way to exclude unqualified practitioners, and—of importance for the current discussion—certification or licensure for evaluators.

Although the topic was discussed repeatedly over the years, the AEA Board never moved forward with a formal professionalization effort. Picciotto (2011) suggests that “heated doctrinal disputes within the membership of the American Evaluation Association have blocked progress in the USA” (p. 165). By contrast, discussions in Canada that began in the 1990s and continued into the new century eventually led the CES National Council to act. In creating the Professional Designations Project, the Council sought “clarity and definition for and within the evaluation discipline/practice in Canada” seeking to address the “identity crisis . . . [that] involved a lack of clear demarcations and defined parameters for the evaluation function” (Buchanan, 2015, p. 38). Cast in the structure of realist evaluation,

the PDP sought to build a practical designation (what works) for the Canadian evaluation community (for whom) within the strengths and weaknesses of the evaluation context of Canada (under what conditions) to begin the process of defining an evaluation identity (and why). (Buchanan, 2015, p. 49, emphasis in original)

Two features of the Canadian context—(a) the unequal distribution of evaluators across regions and (b) the fact that a significant number of Canadian evaluators generally (and CES members specifically) are either employed in the federal government or provide service to the government as contractors—elevated the issue of professional identity and the importance of its distinct definition. The negative potential of an outside group defining evaluator roles and requirements was another compelling reason to move ahead; at Laurie Stevahn’s and my 2009 meeting with the PDCC, we winced upon hearing a rumor that the Canadian
Treasury Board was considering hiring an outside firm to develop job descriptions and related competencies for evaluation contracts in the federal government. Better that the CES take on the task than to let someone outside the field do the job with possibly disastrous results.

The work of the PDCC was guided implicitly by the need to create a credential that would, on the one hand, be meaningful and reflect high-quality evaluation practice and, on the other, be acceptable to the CES membership. As the creators of the initial action plan note, “We were . . . aware that the Society, as with any professional association, would wish to accommodate as many members as possible” (Halpern, Gauthier, & McDavid, 2015, p. 31). Created from hindsight, Table 1 contrasts the undesirable and desirable attributes that a voluntary evaluator designation system might evidence. These attributes guided the Committee's work over the years of the CE Program's development.

Unavoidably, the PDP also operated as part of a broader context as the field of evaluation continued to grow during the first decade of the 21st century. Part of this growth included expanding discussion of professionalization around the

<table>
<thead>
<tr>
<th>Category</th>
<th>Undesirable Attributes</th>
<th>Desirable Attributes</th>
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<tbody>
<tr>
<td>Face validity</td>
<td>Internal to the evaluation community. Perception of inappropriate content or content that is not applicable in certain contexts</td>
<td>Face validity for internal audiences</td>
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<tr>
<td>Process</td>
<td>Process perceived to be nitpicky or specific to a limited type of approaches</td>
<td>Process perceived to be “meaningful”</td>
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<tr>
<td>Types of requirements</td>
<td>Inflexible/unbending/unreasonable</td>
<td>Flexible/adaptable/reasonable—mandatory requirements that make sense</td>
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<tr>
<td>Inclusion of formal testing/assessment</td>
<td>Formal testing</td>
<td>No formal testing</td>
</tr>
<tr>
<td>Cost</td>
<td>Perceived as expensive</td>
<td>Perceived as “reasonably” priced</td>
</tr>
<tr>
<td>Perceived outcomes/benefits</td>
<td>No or negative perceived outcomes for completing the CE process</td>
<td>Positive perceived outcomes (e.g., professional development improved practice)</td>
</tr>
<tr>
<td>Actual outcomes/benefits</td>
<td>CE and noncredentialed evaluators are treated equally</td>
<td>Credentialed evaluators receive unique benefits</td>
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</table>

Table 1. Undesirable and Desirable Attributes for a CES Voluntary Evaluator Credentialing System
world as organizations, funders, and governments engaged in conversations similar to those in Canada. Gauthier, Borys, Kishchuk, and Roy write,

A key conclusion of this study is that the progress in professionalization . . . is quite likely due to a convergence of factors, with effects that are difficult to disentangle from the introduction of the CES CE program—itself the result of multiple influences. Potentially important factors include some that are linked to CES and its activities, and some that reflect trends in public sector management. (Gauthier et al., 2015, pp. 115–16)

Indeed, there was a growing interest internationally in competencies and credentialing; the CES was on the leading edge of this concern. As Picciotto (2011, p. 172) notes, “Except for Canada, progress towards designation or certification of evaluators has proceeded at a snail’s pace.”

INPUTS TO THE CREDENTIALED EVALUATOR PROGRAM DEVELOPMENT AND IMPLEMENTATION

The second component of the CIPP model is inputs, the things needed to begin the project. In the case of the PDP, several inputs aligned that enabled the planning and ultimate implementation to occur. As Dumaine reflects, looking back, “the initial odds of successfully launching a designation program for Canadian evaluators were rather slim. But the program is now fully operational” (Dumaine, 2015, p. 135). Table 2 details the key inputs that facilitated the development process.

Table 2. Inputs to the Professional Designations Project (2007–present)

<table>
<thead>
<tr>
<th>Input Category</th>
<th>Specific Inputs</th>
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<tr>
<td>Governance/leadership</td>
<td>• CES National Council</td>
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<td></td>
<td>• Professional Development Core Committee (2007–2009)</td>
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<td></td>
<td>• Interim (unpaid) VP-PDP to oversee the CE launch and implementation (2009–2013)</td>
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<tr>
<td>Personnel</td>
<td>• Development personnel (2007–present): roughly 14 willing and able volunteers plus a dozen or so others from across Canada</td>
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<tr>
<td></td>
<td>• Implementation personnel (2009–present): paid staff supported by volunteers</td>
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<td></td>
<td>o Part-time paid project coordinator (Application Administrator)</td>
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<td></td>
<td>o Web developer</td>
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<td></td>
<td>o Credentialing Board (2010–present)</td>
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<tr>
<td>Funding</td>
<td>• Two unsuccessful grant applications</td>
</tr>
<tr>
<td></td>
<td>• Limited funding and a reliance on volunteers</td>
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<tr>
<td>Conceptual content</td>
<td>• Guidelines for Ethical Conduct reaffirmed</td>
</tr>
<tr>
<td></td>
<td>• The Program Evaluation Standards adopted</td>
</tr>
<tr>
<td></td>
<td>• Competencies for Canadian Evaluation Practice (CCEP) developed and validated</td>
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</table>
Governance/leadership. The CES National Council had both the authority and the commitment to bring the PDP to fruition. As other articles make clear, the Professional Development Core Committee, which functioned from 2007 to 2009, played an active and unrelenting role in developing the CE program. One of its members, Keiko Kuji-Shikatani, who served as an unpaid Interim Vice President for the PDP from 2009 to 2013, provided consistent and thoughtful leadership in overseeing the CE launch and implementation.

Personnel. Three groups of personnel took part in distinct activities:

1. Program development personnel (2007–present): Some 14 willing and able CES volunteers plus a dozen or so others, mostly women, actively created the Credentialed Evaluator Program. The fact that these volunteers were from many locations across Canada and communicated extensively with leaders of CES chapters was vitally important to the later approval of the outcome.

2. Implementation personnel (2009–present): When the program became operational, the PDP hired two part-time paid staff, who were aided by the continuing work of volunteers. The two jobs consisted of a part-time project coordinator (Application Administrator) and a web developer/administrator.

3. The Credentialing Board (2009–present): The Board is a set of 30 volunteers recruited from the pool of CES award winners and Fellows, all of whom were grandfathered as CEs. Barrington et al. (2015) provide extensive demographic detail about the group, writing that “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” (Barrington, Frank, Gauthier, & Hicks, 2015, p. 89).

Funding. The PDP relied primarily on in-kind CES volunteers’ contributions of time. Although PDCC members wrote two grant applications, they were not funded, which meant that the committee had to rely primarily on volunteers’ commitment to a cause about which many were passionate. Maicher and Frank document the effect of this lack of funding: “Context and environment determined much of what could be realized” (Maicher & Frank, 2015, p. 65). So, for example, the team working on validating the descriptors ultimately gave up on a complicated—and expensive—validation process and revised the methods to be feasible.

Conceptual content. Given the one-year development timeline, the PDCC turned to existing materials for the conceptual content of the new program. To create its three “pillars,” the planning group (a) reaffirmed the CES Guidelines for Ethical Conduct, (b) formally adopted the Program Evaluation Standards (Yarbrough, Shulha, Hopson, & Caruthers, 2011), and (c) created the Competencies for Canadian Evaluation Practice (CCEP) by editing and adapting the Essential
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Competencies for Program Evaluators (Stevahn, King, Ghere, & Minnema, 2005) and then developing descriptors.

THE PROCESS FOR BECOMING A CREDENTIALED EVALUATOR

The third component of the CIPP model is process. In determining the process for becoming a Credentialed Evaluator, the PDCC decided early on to use a portfolio-based approach in which applicants would self-detail their education and experience, and then provide evidence of their having demonstrated 70% of the competencies. The voluntary nature of the process “placed CES in a difficult and vulnerable position” (Dumaine, 2015, p. 157) because it was simply unknown whether CES members or others would choose to engage in the process, regardless of how flexible or reasonable it might seem to those who created it. Dumaine writes, “The first few brave souls who sought the designation of credentialed evaluator had to believe that it would, over time, pay off,” but there were surely no guarantees (Dumaine, 2015, p. 157).

PRODUCTS (OUTCOMES) OF THE PROFESSIONAL DESIGNATIONS PROJECT

The fourth component of the CIPP model is products or outcomes. Helpfully, Gauthier et al. (2015) provide direct evidence of PDP outcomes to date based on a survey of the entire CES membership that had a response rate of roughly one third (64% for CEs and 30% for non-CEs). The survey asked respondents to reflect on five potential beneficiaries of the CE program: (a) the CES itself, (b) CEs, (c) non-credentialed evaluators, (d) the evaluation profession/discipline as a field, and (e) the broader evaluation users/society in general. With the exception of society—the broadest group of potential beneficiaries for which it is simply too soon to tell—the perceived outcomes were generally positive for its beneficiaries:

- The CES itself: “Two thirds of CES members (69%) consider that the CE is a desirable professional designation. CEs hold this view more strongly” (Gauthier et al., 2015, p. 103).
- Credentialed Evaluator Program participants: While short-term outcomes were similar for CEs and non-CEs alike, “Between 47% and 63% of CEs self-assessed that the designation contributed to the four long-term outcomes” (i.e., defined themselves more as professional evaluators in the previous four years, felt more that they belonged to a recognized profession, self-assessed their level of evaluation expertise, and ensured that their practice aligned with CES evaluation competency expectations) (Gauthier et al., 2015, p. 108).
- Noncredentialed evaluators: Even without actively participating in the CE Program, evaluators who have not become CEs may have experienced spill-over effects from the changes to the professional environment
in Canada. For example, “[t]he proportion of evaluators indicating they paid more attention to each of the competency domains over the last four years was higher than 50%, indicating increased attention regardless of credential status” (Gauthier et al., 2015, p. 111).

- The evaluation profession/discipline: The mere existence of the CES CE Program serves as proof that an evaluator credentialing system is possible. Data support its perceived value:

  About two thirds (68%) of [survey] respondents agreed that the designation contributes to the credibility of evaluation as a means of improving programs and policies, that the designation contributes to standardization of the practice, and that it will eventually improve the quality of evaluations. (Gauthier et al., 2015, p. 112)

As Gauthier et al. (2015) make clear, it is extremely early in the program’s history to discuss outcomes. They also note that “[o]verall, although the results of this study suggest that some outcomes in line with those expected for the CE are occurring, the unique contribution of the program to these is extremely difficult to assess” (Gauthier et al., 2015, p. 117). That said, two members of the PDCC summarize their sense of the program’s outcome: “[P]erhaps the most critically important and energizing part of the work is not in the result (i.e., the CCEP or the CE), but rather in the cross-country conversation and debate on evaluator identity that the initiative prompted” (Buchanan & Kuji-Shikatani, 2014, p. 42).

This description of the PDP context, input, process, and product provides a summary of the Credentialed Evaluator Designation. The next section will detail the process through which the CE Program developed.

**APPLYING DEVELOPMENTAL EVALUATIVE THINKING TO THE DEVELOPMENT OF CES’S PROFESSIONAL DESIGNATIONS PROJECT**

The schedule that the PDCC eventually held itself to was beyond taxing; at times it must have seemed impossible. “Qualifiers such as challenging, difficult, chaotic, and nerve-racking would serve well to describe the process that led to the adoption of the program” (Dumaine, 2015, p. 159). Such settings can benefit from a developmental evaluation perspective (Patton, 1994, 2011), especially retrospectively to understand exactly how events unfolded by tracing decisions and actions. The articles in this special issue provide extensive detail that creates a documentary record both of developments over time and of the “principles” guiding the work. What decisions adapted the development process to the Canadian context so it could ultimately succeed?

Table 3 presents a summary of key decisions that impelled the PDP forward from 2006 to 2014. In hindsight, the successful culmination may appear inevitable, but this is merely strong testament to the PDCC’s political savvy, persistence, and willingness to shape the CE process in the interest of forward progress and
Table 3. Overview of Professional Designations Project Development, 2006–2014

<table>
<thead>
<tr>
<th>Year</th>
<th>Professional Designations Project Development</th>
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<tbody>
<tr>
<td>2006</td>
<td>RFP to develop Action Plan</td>
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<tr>
<td>2007</td>
<td>National Council decision to move forward with implementation</td>
</tr>
<tr>
<td>2008</td>
<td>Report on PDP progress at annual conference</td>
</tr>
<tr>
<td>2009</td>
<td>Approval of PDP and standing ovation at annual conference; grandfathering put in place</td>
</tr>
<tr>
<td>2010</td>
<td>Credentialing Board instituted; designation application process launched</td>
</tr>
<tr>
<td>2011</td>
<td>Fast-track process initiated</td>
</tr>
<tr>
<td>2012</td>
<td>Over 100 CEs awarded by the time of the annual conference; continued discussions about process refinement by National Council and Credentialing Board</td>
</tr>
<tr>
<td>2013</td>
<td>Fast-track process ended</td>
</tr>
<tr>
<td>2014</td>
<td>CES National VP takes over responsibility for the CE program</td>
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</table>

the ultimate achievement of its goal. Consider the following key events or decisions in its development.

1. The inciting event took place in 2006 when the National Council let an RFP to develop an Action Plan based on four points: (a) a formal literature review, (b) interviews with people in other organizations that had professional designations, (c) findings from a 2005 survey of Canadian evaluators, and (d) the writers’ extensive knowledge and experience. The RFP’s successful respondents went to work.

2. After carefully considering the proposed Action Plan that resulted, the National Council made the decision in October 2007 to move forward with the implementation of just one of its levels of professional designation (Level 2, Credentialed Evaluator), leaving Levels 1 (Member) and 3 (Certified Professional Evaluator) for possible later consideration. In choosing this limited scope, the “National Council opted for a more cautious and incremental process for professional designations” (Buchanan, 2015, p. 34)—“perhaps [a] gentler approach” (p. 49). There would be no formal certification, no accreditation of programs, and no “member” designation, at least at this time.

3. At the 2008 CES conference plenary, the PDCC gave a report on its positive progress and received the go-ahead to develop the professional designation process. This meant that “[e]very aspect of the CE designation process had to be operationalized by the next annual conference” (Kuji-Shikatani, Matthew, & Thompson, 2015, p. 71), creating a challenging—many would have said unrealistic—timeline for a group of
dedicated volunteers, each and every one of whom had other full-time jobs. They made multiple decisions about the content of the credential, including, for example, the following:

- The CE was not defined at a specific level (junior or expert).
- There were only two mandatory requirements—for a master’s-level education and two years of evaluation experience.
- The PDCC adopted a portfolio-based approach with flexible requirements that would allow individual applicants to explicate the ways in which their education and experience addressed various competencies.
- Applicants had to achieve 70% of the competencies, increased from the initially proposed 60%, which seemed minimal, but still far below 100%.
- The competency statements were enhanced by the addition of carefully detailed descriptors “to provide a base that could be built upon or revised as current knowledge and environments change” (Mai-cher & Frank, 2015, p. 55).

4. Exactly a year after the 2008 conference, those in attendance at the CES conference plenary in 2009 gave an enthusiastic standing ovation to members of the PDCC, and the National Council approved moving forward with implementation.

5. Highlighting the adaptations the PDCC made in response to the context of Canadian evaluation practice and the political situation within the CES helps in thinking about the successful development of the CE Program. These three changes addressed the need for having a sizeable number of credentialed evaluators in fairly short order to create a sense of significant progress.

- First, a “grandparenting scheme,” initiated at the 2009 annual conference and eventually made permanent, waives the education requirement for long-time CES members.
- Second, for two years (2011–2013), a shortened “fast-track” process that required just a CV and description of an exemplary evaluation allowed experienced CES members to earn their CE status. The Credentialing Board suggested the fast track after initial low rates of applicants.
- Third, the need to accommodate applicants who lacked a master’s-level education but had extensive evaluation experience led to a willingness to consider Prior Learning Assessment and Recognition (PLAR) as an education equivalent. Although contentious, the PLAR may be considered a nonissue as very few, if any, candidates have presented one.

6. In hindsight it is not surprising that the initial implementation of this first-ever credentialing system met some bumps along the route. Two critical challenges created additional work for the PDCC: (a) In May
2010 the Application Coordinator got a new job immediately before the site launch, which meant that the volunteer VP-PDP had to absorb those critical responsibilities; (b) when it became clear in 2011 that the computer system initially in place was inadequate to the task, the web developer identified and transitioned to new software as the program was running.

7. A critical step in the program's development occurred in July 2014 when the CES National VP took over responsibility for the CE Program. The temporary position of VP-PDP was dissolved, and the CE Program was institutionalized in the structure of CES governance.

Developmental evaluation helps trace the decision points that led to the CE Program's institutionalization. It can also highlight omissions that may affect the ongoing development process. Buchanan (2015, p. 50) faults the development team for failing to strategically engage representatives of the federal and provincial government systems in the CE program development. The fact that the CE status is not recognized in federal human resource systems could have long-term impact on the program. As a result, CES is carefully monitoring take-up of the CE program by evaluators in all levels of government (Gauthier et al., 2015).

In addition to detailing key events and decision points, developmental evaluation examines the principles to which a program is committed and documents actions that demonstrate evidence of their use. The PDCC articulated five principles or values that guided its work: inclusiveness, transparency, feasibility, utility, and partnering. Table 4 shows the support provided for each of these principles in the Committee's work.

<table>
<thead>
<tr>
<th>Principle</th>
<th>Evidence of the Principle in Action</th>
</tr>
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</table>
| Inclusiveness | • Direct efforts to make the credential applicable to evaluators in a variety of settings  
|               | • Multiple consultations with CES members (Buchanan, 2015)  
|               | • Over 36 volunteers from across Canada and every chapter contributed to the PDP's development  
|               | • Repeated efforts to engage CES members in the development and validation process (e.g., 2008 member survey, consultations with CES chapters across Canada) |
| Transparency  | • Openness among PDPCC, National Council, and CES membership  
|               | • Multiple forms of documentation and communication (e.g., flyer distributed at CES training courses, plenary sessions at 2007 and 2008 national conferences, letters sent to government contacts)  
|               | • Results of all consultations archived  
|               | • Lapel pins distributed to increase visibility |

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Table 4. (Continued)

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<thead>
<tr>
<th>Principle</th>
<th>Evidence of the Principle in Action</th>
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<tr>
<td><strong>Feasibility</strong></td>
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<tr>
<td></td>
<td>• Financial feasibility</td>
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<td></td>
<td>• Reliance on volunteers to do the lion’s share of the development work</td>
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<td></td>
<td>• Work routinely adjusted to fit existing resources</td>
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<td></td>
<td>• Efficient use of online and web-based processes</td>
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<tr>
<td></td>
<td>• The credentialing process that ultimately emerged resulted in marginal positive revenue (2010–2012)</td>
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<tr>
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<td>• Detailed documentation helped track issues over time (Kuji-Shikatani et al., 2015)</td>
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<td></td>
<td>• Flexibility of the CE application process</td>
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<td></td>
<td>• Costs to individuals for the CE application set relatively low</td>
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<td></td>
<td>• CE applicants align their professional experiences and education to competencies in a brief narrative (Kuji-Shikatani et al., 2015)</td>
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<tr>
<td></td>
<td>• Feedback on the completeness of the application</td>
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<td>• Candidates complete applications at their own pace; the application administrator monitors the time it takes applicants to complete materials</td>
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<tr>
<td><strong>Utility</strong></td>
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<td></td>
<td>• Anecdotal evidence of positive regard for the designation (Buchanan, 2015)</td>
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<td></td>
<td>• Perception of CEs that the designation is valuable (Gauthier et al., 2015)</td>
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<td></td>
<td>• Credentialing Board provides suggestions for improvement as necessary</td>
</tr>
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<td></td>
<td>• Movement toward clearer identity for the evaluation community (Buchanan, 2015)</td>
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<tr>
<td><strong>Partnering</strong></td>
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<td></td>
<td>• Development in 2008 of the Consortium of Universities for Evaluation Education (CUEE)</td>
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<tr>
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<td>• Some collaboration with government sector</td>
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THE CE DESIGNATION FRAMED THROUGH ADAPTIVE ACTION

Having described the Credentialed Evaluators Designation in detail and documented events and principles in its development, my remaining task is to place this program in a broader context and discuss future implications. At its most basic level, adaptive action (Eoyang & Holladay, 2013) asks three straightforward questions—What? So what? Now what?—that, when answered, can help individuals or organizations that face uncertainty. This framework is appropriate both for the Canadian Evaluation Society as it continues to shape its CE Program and more generally for other voluntary organizations for professional evaluators (VOPEs) and other interested parties around the world as they consider what, if anything, to do about credentialing. Indeed, considering these three questions in...
the context of professionalizing the field through credentialing may make sense for any organization concerned with the future of evaluation.\(^2\)

**FOR THE CANADIAN EVALUATION SOCIETY**

How might the CES apply adaptive action to the continuing development of the CE Program in its national context? Based on the content of this special issue of CJPE, the first two sections of this article have provided summary details that describe the current “What?” of the CES Credentialed Evaluators Program. To my mind, the key “So what?” answers for the CES will come from making sense of the information emerging from the initial implementation that will shape actions to sustain the program’s forward momentum and institutionalization. Is the program really at a “point of no return,” as Dumaine (2015) purports? Has there been any benefit in being an international leader by creating the “credifying” process? One clear pattern that emerges is the ongoing shaping of requirements to respond to the concerns of long-time CES members, coupled with the need to create a meaningful number of Credentialed Evaluators as quickly as possible. One potential concern, noted earlier, has been the slow uptake of the credential among evaluators working in Canadian governmental settings.

What information might help the CES National Council determine “Now what?” Several questions come to mind immediately, including the following:

- What incentives exist for evaluators to pay to become CEs? What agencies/funders might support people to do so? What, if any, are the disincentives?
- Who opposes the further development of the CE Program, and why? To what extent (if any) are people being excluded from professional practice because of the CE Program?
- Has the process created a critical mass of CEs sufficient to sustain further development of the designation? Has CES reached a tipping point within Canada (Gladwell, 2000), and, if so, what are its effects?
- What, if anything, distinguishes Credentialed Evaluators from other evaluators? Does the CE status actually foster continuing professional development? Has the program helped to successfully frame the identity of Canadian evaluators?
- What does the CE Program actually cost, and is it truly viable in its current form? How will future adaptations be created and implemented? What are its long-term effects?
- Is there sufficient, high-quality, and affordable training/education available across Canada or available elsewhere, either face-to-face or electronically, for evaluators interested in becoming credentialed?
- What would it take for the CES to move to a more restrictive credentialing system (e.g., to implement the two components of the initial action
plan that were not implemented)? What would be the potential value and/or risk in doing so?

While parts of the answers to these questions are included in other articles in this issue, detailed responses could prove extremely helpful in identifying what to do next.

FOR OTHER GROUPS INTERESTED IN ESTABLISHING EVALUATOR CREDENTIALS

As noted, adaptive action begins with a careful description of “What,” in this case the Credentialed Evaluator Designation created in the Canadian context. Only the CES National Council and ultimately the Society’s members can determine next steps in that program’s development. Consideration of the CE Program’s implications for the field more generally, however, belongs to any evaluator concerned with the potential of evaluator credentialing—for better or worse. Broadening the context to an “increasingly interconnected global [evaluation] system” (Picciotto, 2011, p. 166) with its sizeable and growing number of VOPEs around the world raises wider concerns, and in my opinion the time appears right for their discussion: “On both sides of the Atlantic and in the zones of turmoil and transition of the developing world aspiration towards a recognized professional culture is sweeping the evaluation community” (Picciotto, 2011, p. 177). What can the CES case contribute to the conversation as other groups—whether VOPEs, governmental units, or additional funders—consider bringing the promise of evaluator credentialing to life?

Again, the many articles in this special issue provide helpful details of process, outcomes, and decision points that make up the Canadian “What?” A wider context, however, expands to the “What?” of other national credentialing efforts, including a Japanese Evaluation Society program that certifies educational evaluators and the development and use of competencies in numerous VOPEs internationally (see Podems & King, 2014; King & Stevahn, in press). Stepping back and looking at the CE Designation from this broader perspective again highlights the powerful effect of the Canadian context on the program’s evolution, including, for example, the lack of significant funding for its development, the geographic distribution of CES PDP volunteers, and the need to provide viable options for long-time CES members. In the context of other countries or evaluation societies, these issues may or may not affect the development process.

“So what?” What can we learn from the CES’s extraordinary effort that succeeded in initiating and then institutionalizing an evaluator credential? First, as noted above, the CES program provides proof of concept for a viable VOPE evaluator credentialing system. Together, the PDCC, the National Council, the Credentialing Board, the CES membership, and everyone who has applied to become a CES Certified Evaluator have shown that a VOPE can develop an evaluator credential in what appears to be a cost-effective and sustainable manner. King and Stevahn (in press) write, “The CES has documented the process and outcomes of
its CE program as a potential model for other professional associations.” In addition, as Dumaine notes, “With [its] three pillars, one can argue that the CES designation program creates a remarkably fertile ground to test and refine current and future evaluation models and theories” (Dumaine, 2015, p. 158). Both the PDP logic model and the related outcomes logic model provide grounding for continued R&D wherever people are willing and able.

Second, the development and implementation of the CES CE Program raises several useful issues for evaluation leaders to consider when thinking about credentialing programs in other places. The CES has provided a model for one form of professional designation that combines elements of the traditional “credential” and “certification.” On the one hand, thankfully, the field now has a solid example with detailed records and individuals willing to share experiences from which other VOPEs can benefit. On the other hand—as evidenced in this issue’s articles—the CE Program is decidedly grounded in its Canadian setting, which may or may not share similarities with other settings (the role of the government and other evaluation funders, the political structure of a country, the size and make-up of the VOPE membership, etc.). Let me note five issues that in my opinion demand special consideration.

**The use of evaluator competencies to structure any credentialing program.** Picciotto (2011, p. 172) notes that “[a]nyone with a rudimentary knowledge of the evaluation jargon can pretend to be an evaluator. The competencies debate remains inconclusive.” King and Stevahn (in press) detail several concerns with the use of any set of competencies, both practical concerns (e.g., the need to update the competencies regularly as theory and practice evolve) and conceptual concerns (e.g., the degree to which competencies should document and lead to high-quality practice as opposed to being an aspirational set of knowledge, skills, and dispositions; validity and the relation of the credential to actual good practice; and the potential importance of subject-specific content). The centrality of ethics and professional standards in evaluation practice is clear, as are the overarching categories of competencies across various sets (i.e., professional, technical, situational, management, and interpersonal); beyond that, specific competency details can vary.

**The importance of a perceived need for/value of a credential.** In the Canadian context, the initiators framed the development project as a needed search for evaluator identity and community building, with the hope and expectation that credentialed evaluators would seek professional development to build their skill sets over time. Speaking of the context with which I am most familiar, to date this need has not risen in the US with sufficient force to launch an AEA credential, although the Board is now discussing professionalization issues. Leaders of other VOPEs should conduct highly thoughtful and detailed situation analyses before moving forward, knowing that some may view this move toward professionalizing negatively (Picciotto, 2011).

**Skillful attention to milieu.** VOPE and other developers must be willing to shape the credential (whatever form it takes) to fit the constraints of the context—including among others the political, financial, and leadership constraints that will
unavoidably affect development. In another situation, the innovative professional designation (characterized by some as part credential and part certification) that evolved in Canada and created options viable in that setting may not prove viable elsewhere. Local adaptation and credibility are key; one size is unlikely to fit all.

**Finding qualified and committed people to develop and manage the program.** Organizations interested in creating evaluator credentials, whether VOPEs, government agencies, or other funders, will unavoidably face the challenge either of (a) raising funding to support development and/or (b) identifying volunteers to do the work. In the CES example, when fundraising through grant applications was unsuccessful, the program relied on a small number of steadfast career evaluators who volunteered and would not be deterred. The CE development involved 450 days of volunteer time from 34 volunteers representing $350,000 of in-kind service (Buchanan, 2015).

But finding additional volunteers and actively engaging the membership proved to be a challenge. In this issue, authors mention that there were no volunteers from three provinces (perhaps not surprising since the CES chapters in some provinces have few members), that only 99 of 1,500 members (approximately 5%) responded to the member-wide survey about the CE competencies in 2008, that consultations with CES chapters by the developers of competency descriptions reached only 17% of the membership, and that 17 of 40 experts with valid addresses (42%) responded to the validation process for competencies and descriptors. While the 2014 survey of CES members about the CE program had an acceptable 35% response rate overall, this also meant that over two thirds of the membership did not respond. Nevertheless, the “thunderous standing ovation of over 700 CES members” at the 2009 Ottawa conference clearly supported the CES commitment to move ahead (Kuji-Shikatani et al., 2015, p. 71), and the intrepid core volunteers did just that, persisting in the challenging, detail-oriented, and sometimes tedious work necessary to create the CE designation.

Other VOPEs, take note! If the development process is ultimately to succeed, there must be a group of thick-skinned, committed individuals—whether volunteers or compensated professionals—who are willing to listen, assess changing situations, roll with the inevitable punches that concerned participants will throw, and keep going, regardless. W. Edward Deming’s first principle for management is to “create constancy of purpose toward improvement of product and service, with the aim to become competitive and to stay in business, and to provide jobs” (Deming, 2014). This is potentially an appropriate principle for the work.

**Conceiving the credentialing system holistically.** The CES example makes clear that any evaluator credentialing program needs to take into account the entire gamut of stakeholders and services necessary to sustain the process over time. The PDP outcomes logic model (Gauthier et al., 2015) names five stakeholder groups (the CES, credentialed evaluators, noncredentialed evaluators, the evaluation profession/discipline, and evaluation users/society), moving from the VOPE to society in general, all of which have different perspectives and potential outcomes that require attention. In addition, the infrastructure to support the
credentialing process includes not only the mechanisms directly related to the credential, but also, for example, the necessary training and education to support people’s professional development. Attending to the system features of a new program may help facilitate its ultimate success.

The final step of adaptive action—“Now what?”—requires decision makers to choose a course of action from the many conceived during the second step (“So what?”). CES leadership will determine next steps for the Credential Evaluator Program. It falls to leaders in evaluation around the world to consider the potential value of a credentialing system for evaluators in their settings and whether or not to move ahead with its creation. In other areas of professional practice there are companies and professionals who are hired routinely to develop credentialing systems, and we surely have lessons to learn from their extensive experience. Picciotto strikes an appropriately cautionary note when he writes that “[p]remature moves towards designation or certification could do more harm than good” (2011, p. 179). The question, finally, may come down to whether the potential benefits outweigh the costs of creating and maintaining such a system.

This review article has described the CES’s Credentialed Evaluators Designation using the CIPP model and then detailed the steps and principles applied in its creation using Patton’s developmental evaluation. The final section used three framing questions to raise concerns for the field more broadly, knowing that the time is ripe for continued discussion. In the article by Barrington et al. (2015, p. 95), we learn that one CES Credentialing Board member commented, “[The designation] wasn’t to be the end of our journey in professionalizing evaluation,” and this is as true for CES members as it is for those of us who live elsewhere. But what a helpful beginning it is from which others in the field of evaluation will surely benefit.

NOTES
1 Recent developments in “principles-based” evaluation would likely label these single words “values” or “category labels” rather than formal statements of principles, which include more detail and are usually stated as sentences (personal communication with M. Q. Patton, March 14, 2014).
2 This discussion will focus solely on credentialing, but it is important to acknowledge other approaches to professionalization, including accreditation of training and educational programs and more formal certification and licensing.

REFERENCES


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