

May 18, 2006



Request for Proposals

Canadian Evaluation Society

for

Fact Finding Regarding Evaluator Credentialing

Issue Date:	May 19 th 2006
Closing Date:	June 15 th 2006
Selection of Contractor Date:	June 30 th 2006
Submission of First Draft	September 15 th 2006
Submission of Final Report	October 10 th 2006

Canadian Evaluation Society

Address Inquiries to:

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1.0 Proposal Content and Requirements

1.1 Purpose and Objectives

The purpose of this RFP is to attract proposals to produce an action plan that would aid the Canadian Evaluation Society (CES) in establishing a professional credentialing system including a member registry. By professional credentialing system is meant a mechanism or means of determining whether an applicant's educational or practical experiences and achievements warrant the award of a professional credential (Altschuld, 2005)¹. The action plan would be based on fact-finding research including reviews or consultation of professional practice organizations that currently operate credentialing systems. The action plan would identify specific benefits and risks of credentialing and provide options for consideration by CES.

1.2 Nature and Scope of the Work

This project requires that the contractor produce a concrete action plan with policy options for consideration by CES. The contractor would be required to:

- Situate the action plan within a review the evaluation literature related to professional standards and competencies.²

- Identify and review and/or consult organizations that currently operate a credentialing system for their members: Of key interest would be answers to the following questions:
 1. On what professional standards of practice is the system based?
 2. What training and professional development options are acknowledged? Are training programs accredited by the organization?
 3. Is/was a 'grandparenting' system invoked for existing members at the time of system installation? How was grandparenting structured?
 4. Who delivers training?
 5. Are professional experience parameters acknowledged and incorporated into the credentialing system? How?
 6. Are differential levels of professional credential identified and maintained? On what basis are distinctions made?
 7. Is demonstration of continuous learning required of members in order to maintain credentials? What sorts of learning experiences qualify?
 8. What are the major set-up costs?
 9. What are the ongoing maintenance costs?
 10. How would the system be financed?
 11. Are tangible benefits of the credentialing system in evidence? What are they?

¹ Please report definitions that may be discrepant from Altschuld's.

² Please note that major references for this are given in the appendix.

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- Structure a concrete action plan that would potentially assist CES in developing, initiating and maintaining a credentialing system. Attention would be given in the proposed action plan to:
 1. The sequence of steps to be taken by CES
 2. Options for consideration and likely benefits, costs and challenges associated with each.
 3. Processes for developing criteria for credentialing members. (minimum standards and/or domain specific criteria)
 4. Potential partners who should be involved in developing the system.
- Provide a draft report no later than September 15, 2006.

2.0 Background Information

2.1 Introduction and context

The Canadian Evaluation Society (CES) is a not-for-profit professional association whose members are currently not certified or credentialed. CES is seeking proposals from consultant (s) to conduct a Fact-Finding study. This study would provide CES with models and processes of credentialing that would facilitate the establishment of such a system and identify the pro's and con's of credentialing versus certification or licensing. Credentialing evaluators is part of the CES's endeavor to position and strengthen the evaluation function in the marketplace.

In its recent strategic planning process CES identified several areas of focus. They include increasing its visibility, profile and credibility, nationally, provincially and territorially. To achieve these key result areas, the Member Services Committee was charged with investigating the feasibility and mechanisms necessary for credentialing evaluators. Credentialing and certification are recurrent themes for the CES and other evaluation societies. Recent developments in the evaluation community – that is, publications and focused dialogue – suggest that now may be an opportune time to reach agreement among the various facets and options that would be involved in activating the process of evaluator credentialing. Moreover, while public and private sector organizations focus increasingly on accountability and performance management, evaluation reports and evaluation functions in departments of federal and provincial governments have been reported to be of less than satisfactory quality. This is likely the result of the following realities: the evaluation function lacks clear demarcations and defined parameters, the under-funding of evaluation units and departments, and entrance requirements being essentially non-existent. Consequently people with a great diversity of skills are engaged in evaluations and there may exist a perception that anyone with a degree (or perhaps even without a degree) can carry out evaluations. On the other hand, there are also evaluators who can demonstrate considerable experience, having carried out numerous evaluations, including training of other evaluators.

Within literature and practice, questions and propositions are formulated and aimed at clarifying the nature of evaluation and the core skills necessary to carry out a credible

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evaluation. The evaluation function itself is unique and differs from such domains as research, performance measurement, audit, monitoring, reviews, statistics, and the like. Additionally, the function may be seen as encompassing the spectrum from research and scientific designs, using Randomized Controlled Trials (RCTs), to data warehousing, qualitative reviews, financial or economic evaluations and Balanced Scorecard methods and approaches. Unlike other jurisdictions, notably the US, training programs which would provide academic certification and demarcation of the field are only now beginning to be established in Canada.

3.0 Submission of Proposals

3.1 Address

CES – Request for Proposal: Fact Finding Regarding Evaluator
Credentialing
c/o The Willow Group
1485 Laperriere Avenue
Ottawa, ON, CANADA. K1Z 7S8

3.2 Number of copies

Four hard copies and an electronic copy in Word or WordPerfect of the proposal must be submitted. Submissions received after the closing date will not be accepted.

3.3 Length

Proposals should not exceed 5 pages, single-spaced, 1-inch margins, and 12-point font. (Excluding references and appendices)

3.4 Qualification of Vendor(s)

Submissions must identify the academic and/or practical qualifications and competencies of the contractor as related to the identified subject matter and scope of the project, including references where possible who are able to comment on the relevant experiences of the candidate. The information must be provided in writing at the time the proposal is submitted.

Where a firm makes a submission, individuals must be identified and CVs are required for each person named.

Submissions must specify the services and associated costs to be provided. Remuneration or per diems must be specified in the proposal.

4.0 Selection Criteria

Each proposal will be assessed in accordance with minimum standards of acceptability. The standards will be: not acceptable, acceptable and superior based on the extent to which they meet the criteria outlined in 4.1 through 4.4 below.

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4.1 Mandatory Requirements

- The contractor must submit a signed offer by 5PM, EST, June 15, 2006.
- The price does not exceed \$10,000 CA (GST/HST extra).

4.2 Qualifications of consultant or project team

- Priority shall be given to vendors who are members in good standing of CES or a professional evaluation organization recognized by the International Organization for Cooperation in Evaluation (IOCE) prior to the submission.
- Relevant academic qualifications
- Relevant experience

4.3 Proposal quality

- Knowledge base of evaluation, concepts, theories and methodologies
- Understanding of scope and objectives, including peripheral problems
- Adequacy of approach and methodology

4.4 Project management

- Willingness and ability to consult and work collaboratively with CES
- Detailed project work plan, with deliverables, that identifies September 15, 2006 as the date for submission of the draft report.
- Completeness of the proposal.

5.0 General Conditions

5.1 Right to Amend RFP

CES reserves the right to amend or supplement the RFP, giving equal information and cooperation by way of issued addendum to all proponents as a result of any such amendment.

5.2 Vendor Incurred Costs

All costs incurred in the preparation and presentation of proposals in any way whatsoever shall be wholly absorbed by the Vendor.

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5.3 Indemnity

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

5.4 Acceptance of Proposals

CES is not bound to accept the lowest price or any proposal of those submitted. Proposals will be assessed in light of the evaluation criteria specified in section 4.0 above.

5.5 Evaluation of Proposals

The Member services committee of CES will evaluate all acceptable proposals. The right is reserved to make an award based directly on the proposals submitted or to negotiate further with one or more proponents.

5.6 Maximum Funding

The funding for this project is limited to \$10,000 CA (GST/HST extra). Bids valued in excess of this amount will be considered non-responsive.

5.7 Ownership

The proposal shall be the property of the CES and shall not be published or released without the written consent of CES.

5.8 Termination of Contract

A contract awarded on the basis of a response to this RFP may be terminated by either party with 2 weeks notice, with outstanding payments to be negotiated between the contractor and the CES.

6.0 Questions and Inquiries

6.1 Communication

The prospective bidders may approach CES membership services committee about this project. The questions should be submitted in writing via e-mail to

Jim Cullen, Chair, Member Services Committee jimcullen99@msn.com

Questions should be submitted as soon as possible, but no later than a week before the closing date. The goal is to answer each question within two working days of its receipt.

The answers to questions will be distributed to all vendors who have informed Susan Ryan of the Willow Group of their intent to make submissions.

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Appendix

A considerable body of research exists regarding essential evaluator competences, professionalism and accreditation/certification issues. We refer vendors to the items identified below.

- Altschuld, J. W. (2005). Certification, credentialing, Licensure, competencies, and the like: Issues confronting the field of evaluation. *Canadian Journal of Program Evaluation*, 20(2), 157-168. (www.cjpe.ca)
- Altschuld, J. W. (1999). A case for a voluntary system for credentialing evaluators. *American Journal of Evaluation*, 20(3), 507-517.
- Aucoin, P. (2005, April). *Decision making in government: The role of program evaluation*. Ottawa: Centre of Excellence in Evaluation, Treasury Board of Canada, Secretariat. (available online at: http://www.tbs-sct.gc.ca/eval/tools_ouils/aucoin/aucoin_e.asp)
- Breen, G., & Associates. (2005, May). *Interviews with deputy ministers regarding the evaluation function*. Ottawa: Centre of Excellence in Evaluation, Treasury Board of Canada, Secretariat
- Cousins, J. B., & Aubry, T. (2006, April). *Roles for government in evaluation quality assurance: Discussion paper*. Ottawa: Treasury Board of Canada, Secretariat and University of Ottawa.
- Gusman, T. K. (2005, May). *Improving the professionalism of evaluation*. Ottawa: Centre for Excellence in Evaluation, Treasury Board of Canada, Secretariat (available online at: http://www.tbs-sct.gc.ca/eval/dev/Professionalism/profession_e.asp)
- Long, B., & Kishchuk, N. (1997). *Professional certification: A report for the National Council of the Canadian Evaluation Society on the experience of other organizations*. Ottawa: Canadian Evaluation Society. (www.evaluationcanada.ca)
- Love, A. (1994). Should evaluators be certified? In J. W. Altschuld & M. Engle (Eds.), *New Directions in Program Evaluation: The preparation of professional evaluators; issues perspectives, and programs, No 62* (pp. 29-40). San Francisco: Jossey Bass.
- Perrin, B. (2005). How can the information about the competencies required for evaluation be useful. *Canadian Journal of Program Evaluation*, 20(2), 169-188. (www.cjpe.ca)
- Stevahn, L., King, J. A., Ghere, G., & Minnema, J. (2005). Evaluator competencies in university-based training programs. *Canadian Journal of Program Evaluation*, 20(2), 101-123.

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Zorzi, R., Perrin, B., McGuire, M., Long, B., & Lee, L. (2002). Defining the benefits, outputs, and knowledge elements of program evaluation. *Canadian Journal of Program Evaluation*, 17(3), 143-150. (www.cjpe.ca)