

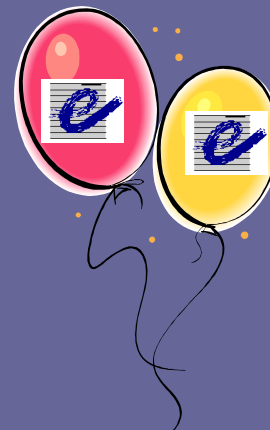
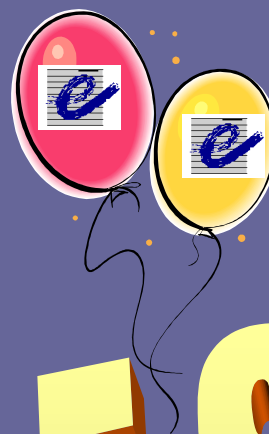
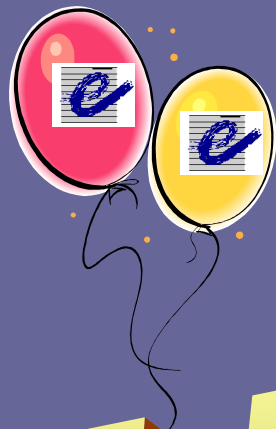
**Canadian Evaluation Society**

***PROFESSIONAL DESIGNATIONS***

***Brigitte Maicher, Keiko Kuji-Shikatani,  
Heather Buchanan & Volunteers***

**CES 2009 Conference  
June 2, 2009**

YEAAA  
CES!!!





# ***Professional Designations***

## ***Project Overview***

***CES Professional Designations Project***



# ***Volunteers***

## ***450 DAYS OF EFFORT!***

Alan Amey

Denis Auger

Michelle Anderson-  
Draper

Jennifer Birch-Jones

Julie Chevalier

Julie Cote-Stordy

Debbie Delancey

Melanie Dubuc

Faviola Fernandez

Christine Frank

Marthe Hurteau

Gwen Keith

Alison Kerry

Edward Lentz

Bud Long

Maureen Matthew

Martha McGuire

Carmen McKell

Nancy McMahon

John Morris

Tracy Perry

Cheryl Poth

Marguerite Potvin

Margo Rowan

Marilyn Thompson

Ollie Triska

Betty Ann Turpin

Saode Savary

Susan Scott

Khaddouj Souaid

Brenda Stead

Patricia Streich

Evelyn Valge

Hema Vyas

Greg Wright

***CES Professional Designations Project***



# PROJECT OVERVIEW



***CES Professional Designations Project***



# 2009 Consultations

**REACH TOTAL - 263**

- PEI – 14
- NS – 19
- NWT – 4
- BC – 15
- NB – 19
- NCC – 65
- NFLD – 7
- AB – 34
- SQEP – 31
- SK – 11
- MB - 15
- ON - 29

***CES Professional Designations Project***



# ***Overall* CES Members said...**

- Were appreciative of the opportunity to provide input
- Strong support to move forward with professional designations
- Felt this was an important initiative for CES & wanted the CE to be meaningful, a credible designation
- Applauded the work of the professional designations project

***CES Professional Designations Project***



# ***CES*** ***Credentialed Evaluator***

***CES Professional Designations Project***





# Breaking news...

- Brief to Council on **Competencies**
  - With Competencies Companion Document
- **Policy & Program** Proposal
  - Program design (goal, activities, structure and resources)
  - Program implementation plan
  - Program measurement plan

***CES Professional Designations Project***



# Competencies for Canadian Evaluation Practice

- Crosswalk
- Draft competencies
- Member survey
- Credentialing Sub Committee work
- Validation survey

***APPROVED***

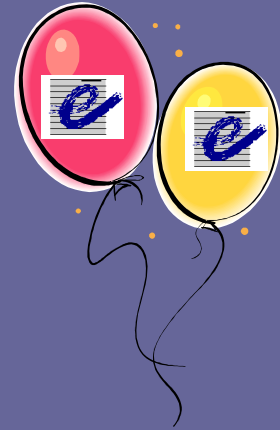
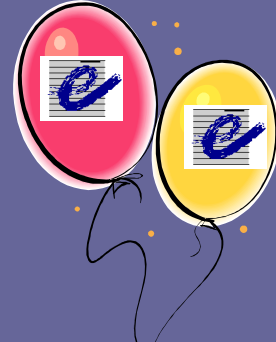
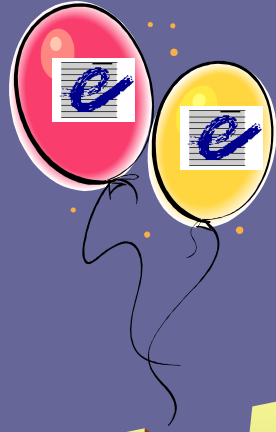
***CES Professional Designations Project***



# COMPETENCIES

- **Reflective Practice** competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.
- **Technical Practice** competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis, interpretation, and reporting.
- **Situational Practice** competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are being applied.
- **Management Practice** competencies focus on the process of managing a project / evaluation, such as budgeting, coordinating resources and supervising.
- **Interpersonal Practice** competencies focus on people skills, such as communication, negotiation, conflict resolution, collaboration, and diversity.

YEAAA  
CES!!!





# Professional Designation Policy

- **Voluntary** service to CES Members and to those stakeholders with whom we work
- the Credentialed Evaluator (CE) designation means that ***the holder has provided evidence of education and experience required to be competent***



# Credentialed Evaluator (CE)

## *Qualifications*

- Graduate degree or certificate; AND
- Two (2) years (full time equivalent) evaluation-related work experience within the last 10 years; AND
- Demonstrate the relevance of education and / or experience to 70% of the competencies in each of the five domains in the Competencies for Canadian Evaluation Practice.



# You said...

## ***About the educational requirements:***

- Support for graduate level requirement with ability to draw equivalencies through PLAR:
  - As new entrants bring this level of education, could drop PLAR in 5 years
  - It adds to the credibility of the credential
  - Majority of current members have this
- Concern that the requirement should be less than graduate level:
  - To better meet the needs of current members
  - Graduate studies not required to do evaluation
- Costs of PLAR and international degree equivalencies
  - Disadvantage some members with higher costs (not inclusive)
  - Lack of Canadian Evaluation Masters means many go outside Canada



# PDCC Response...

- Less than Graduate level
- Keep Graduate level
- Costs of equivalencies  
PLAR & Int'l degrees

## Graduate level education be retained, and:

- Grand parent provision for  
existing Members
- Obtain international  
equivalencies & build into  
CE system





# ***Educational requirement***

## **ONTARIO QUALIFICATIONS FRAMEWORK<sup>1</sup>: QUALIFICATION STANDARDS**

<b>Descriptor</b>	<b>Baccalaureate/Bachelor's Degree</b>	<b>Post-Diploma Certificate</b>	<b>Masters Degree</b>
<b>Depth &amp; Breadth of Knowledge</b>	a) A general knowledge and understanding of many key concepts, methodologies, theoretical approaches and assumptions in a discipline; b) A broad understanding of some ...	a) Specialized knowledge in a specific field; b) A level of knowledge and skill that enhances one's ability to perform a more specialized ...	A systematic understanding of knowledge, including, where appropriate, relevant knowledge outside the field and/or discipline, and a critical ...
<b>Conceptual &amp; Methodological Awareness/ Research and Scholarship</b>			
<b>Communication Skills</b>			
<b>Application of Knowledge</b>			
<b>Professional Capacity / Autonomy</b>			
<b>Awareness of Limits of Knowledge</b>			

Source: <http://www.edu.gov.on.ca/eng/general/postsec/oqf.pdf>

***CES Professional Designations Project***



# CES Members said...

## ***About the **experience requirements:*****

- Should be longer, suggest 3 or 5 years
- Two years (full time equivalent) is too much for those who do evaluation work less than full time
- Barrier for those teaching evaluation & those just completing education
- Need to define:
  - when the 2 years of experience is to occur (within last 5 years? 10 years?)
  - What constitutes evaluation-related work
  - How to 'count' evaluation related work, by evaluation elapsed time or level of effort?



# PDCC Response...

- Longer experience, 3 or 5 years
- Two years is too much
- Need to define:
  - 2 years when?
  - How to & what counts?

**Retain experience requirement at 2 years (full time equivalent) evaluation-related work, and:**

- Specify experience within last 10 years
- Carefully consider & define what to count as experience and how to count it



# CES Members said...

## ***About the alignment of experience &/or education with competencies:***

- 60% is too low, suggest 70% to keep the standard high for credibility
- Have mandatory competencies, required by all CE's
- Require attestation (not narrative) versus assessment aspect is critical
- Require only technical competencies
- Experience only, align work with competence, education alone not sufficient
- Do not use competencies, stick to domain level with fuller descriptions
- Use different %'s in different domains, weighting the relative importance of the competencies or look at designations in different fields of evaluation
- Competencies are implicitly weighted by having more in one domain than another

***CES Professional Designations Project***



# PDCC Response...

- 60% is too low
- Require mandatory or core competencies
- Do not use competencies
- Do not require narrative

## Retain alignment of experience &/or education to competencies, and:

- Use competencies
- Increase to 70% p/domain
- Scale narrative allotment, i.e. 30 or 50 words p/competency
- Continue to require narrative



# Credentialed Evaluator (CE)

## *Maintenance & Renewal*

- Ongoing learning / professional development
- Every three years 40 hours of learning



# CES Members said...

## ***About the renewal process:***

- Good to have a requirement for ongoing professional development
- Can this requirement be met with the lack of professional development available, pressure on Chapters to provide more PD
- Need to define what counts as professional development
- Suggest provide learning plans
- Can a mentoring program be pursued
- Need to consider leaves (such as parental leave) in the 3 year renewal period

***CES Professional Designations Project***



# PDCC Response...

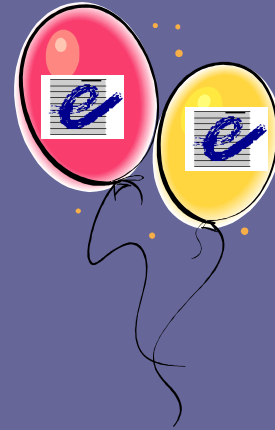
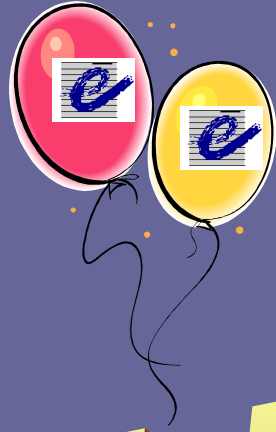
- Pressure on Chapters for PD
- What counts
- Mentoring program
- Learning plans
- Leaves during 3 year renewal period

## Implementation Plan addresses all of these issues:

- Impact of CE on other Council Committees, including Professional Development
- Define ongoing learning very broadly
- Consider using CE's in a mentoring program
- Provide learning plan templates as part of CE guidelines & create a CE account where learning can be recorded for renewal tracking
- Devise provisions for CE leaves from professional life in the renewal period



YEAAA  
CES!!!





# What's next

- Build the program June – December 2009
- Open for applications January 2010

***CES Professional Designations Project***



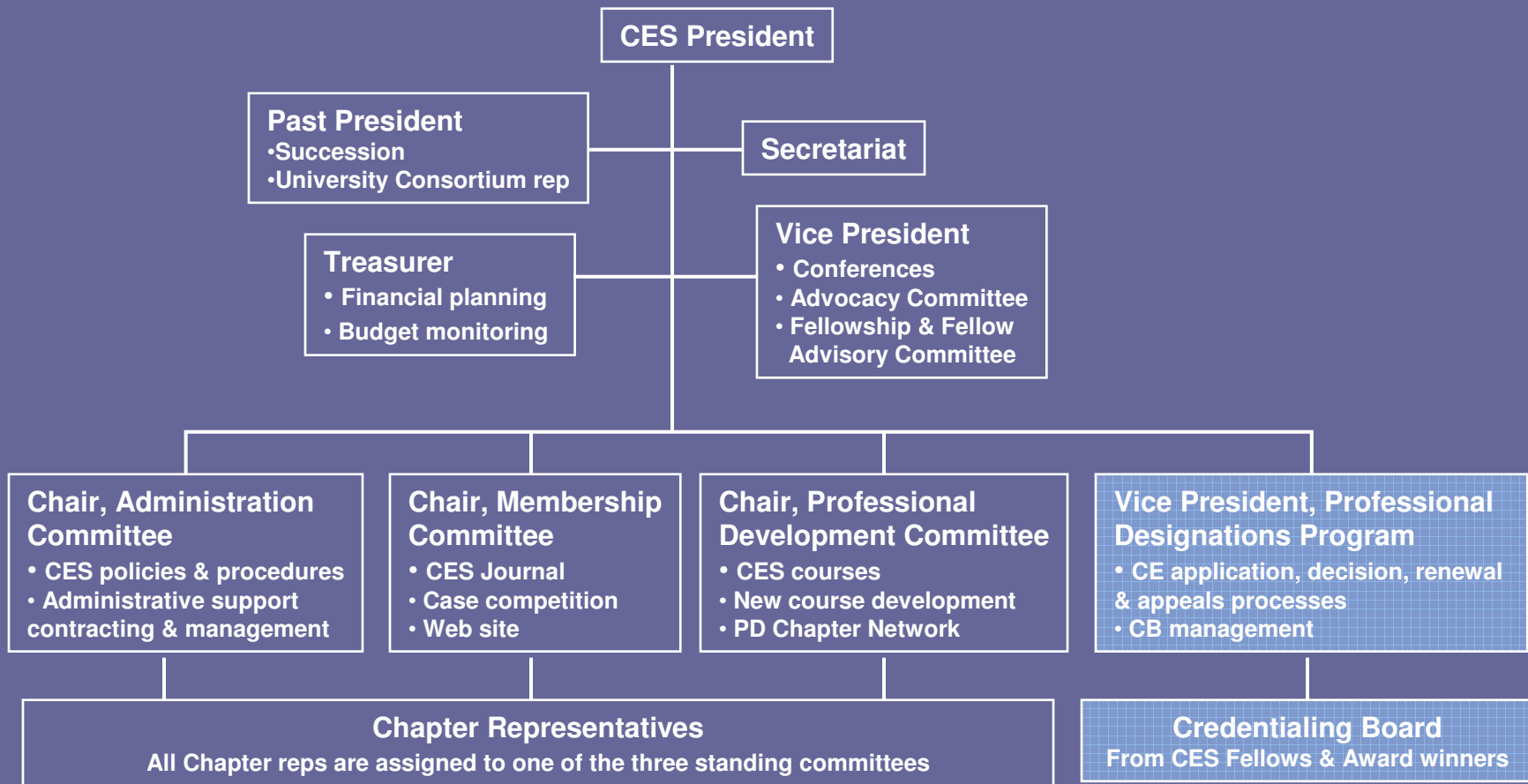
# Professional Designation Program

- Vice President, Professional Designations
- Application Administrator
- Credentialing Board

***CES Professional Designations Project***

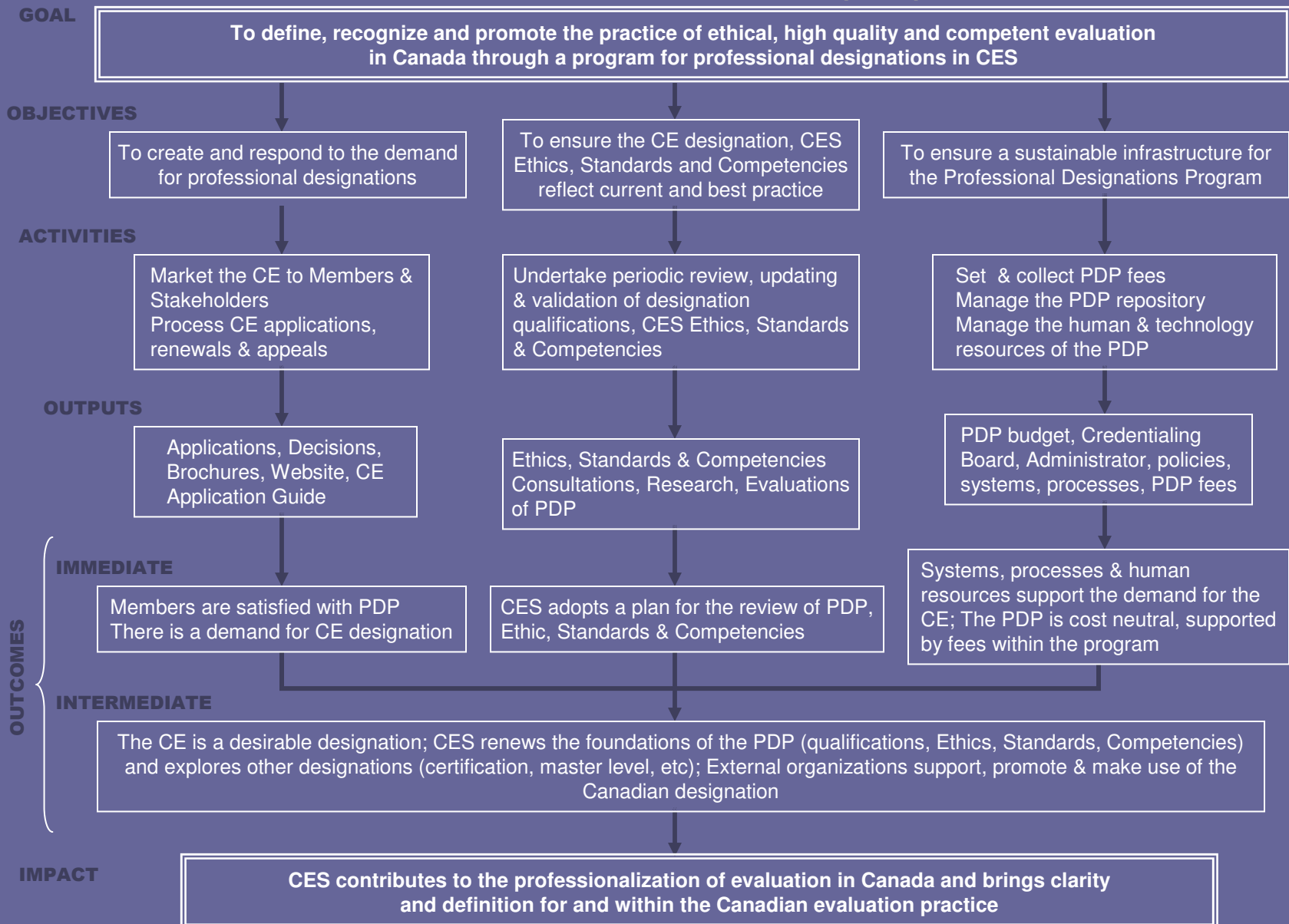


## NATIONAL COUNCIL



***CES Professional Designations Project***

## **PROFESSIONAL DESIGNATIONS PROGRAM (PDP) LOGIC MODEL**





# CES Members said...

## *About the **level of interest:***

- Ranged from a low of 10% to a high of 75%

**Appears an estimate of 20% is reasonable for costing purposes**



# Professional Designation

## Program Costs – 20% Uptake

EXPENDITURES	Rate	Unit	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
<b>Fixed Costs</b>												
Admin- Inquiries, registry set up	\$55	208	\$ 11,440	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Admin - inquiries, registry (2 hrs/wk)	\$55	104	\$ -	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720	\$ 5,720
Additional Council Member			\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000	\$ 3,000
Implementation Project Mgr.			\$ 30,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Website development, etc.			\$ 20,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Translation			\$ 15,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000
Supplies			\$ 5,000	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Marketing			\$ 5,000	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500	\$ 1,500
Evaluation & Baseline			\$ 5,000	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350	\$ 8,350
<b>Total Fixed Costs</b>			<b>\$ 94,440</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>	<b>\$ 27,070</b>
<b>Variable Costs</b>												
Admin - 1 hr @ \$55/hr. per app. In yr 1	\$55	1	\$ 17,380	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Admin - 0.5 hr @ \$55/hr. per app in yr 2+	\$55	0.5	\$ -	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255	\$ 2,255
Admin - .25 hr @ \$55/hr. per renewal	\$55	0.25	\$ -	\$ -	\$ -	\$ 4,345	\$ 1,128	\$ 1,128	\$ 5,473	\$ 2,255	\$ 2,255	\$ 5,473
CBrd - 2 hr @ \$67/hr. per app.	\$67	2	\$ 42,344	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988	\$ 10,988
CBrd - 1 hr @ \$67/hr. 3rd reviewer 30%	\$67	1	\$ 6,352	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648	\$ 1,648
<b>Total Variable Costs</b>			<b>\$ 66,076</b>	<b>\$ 14,891</b>	<b>\$ 14,891</b>	<b>\$ 19,236</b>	<b>\$ 16,019</b>	<b>\$ 16,019</b>	<b>\$ 20,364</b>	<b>\$ 17,146</b>	<b>\$ 17,146</b>	<b>\$ 20,364</b>
<b>Total Annual Costs</b>			<b>\$ 160,516</b>	<b>\$ 41,961</b>	<b>\$ 41,961</b>	<b>\$ 46,306</b>	<b>\$ 43,089</b>	<b>\$ 43,089</b>	<b>\$ 47,434</b>	<b>\$ 44,216</b>	<b>\$ 44,216</b>	<b>\$ 47,434</b>

<b>Number of applications</b>	<b>316</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>	<b>82</b>
<b>Number of CE's (10% denial + 10% drop out)</b>	<b>0</b>	<b>284</b>	<b>330</b>	<b>371</b>	<b>407</b>	<b>440</b>	<b>470</b>	<b>497</b>	<b>521</b>	<b>543</b>	

<b>REVENUE - Scenario 2 Price Point</b>												
New applications @ \$385	\$385		\$ 121,660	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570	\$ 31,570
Renewals @ \$35	\$35		\$ -	\$ 9,940	\$ 11,550	\$ 12,985	\$ 14,245	\$ 15,400	\$ 16,450	\$ 17,395	\$ 18,235	\$ 19,005
<b>Total Annual Income</b>			<b>\$ 121,660</b>	<b>\$ 41,510</b>	<b>\$ 43,120</b>	<b>\$ 44,555</b>	<b>\$ 45,815</b>	<b>\$ 46,970</b>	<b>\$ 48,020</b>	<b>\$ 48,965</b>	<b>\$ 49,805</b>	<b>\$ 50,575</b>
<b>Profit / Loss each year</b>			<b>\$ (38,856)</b>	<b>\$ (451)</b>	<b>\$ 1,159</b>	<b>\$ (1,751)</b>	<b>\$ 2,726</b>	<b>\$ 3,881</b>	<b>\$ 586</b>	<b>\$ 4,749</b>	<b>\$ 5,589</b>	<b>\$ 3,141</b>
<b>Cumulative Budget Position</b>			<b>\$ (38,856)</b>	<b>\$ (39,307)</b>	<b>\$ (38,148)</b>	<b>\$ (39,899)</b>	<b>\$ (37,173)</b>	<b>\$ (33,292)</b>	<b>\$ (32,705)</b>	<b>\$ (27,957)</b>	<b>\$ (22,368)</b>	<b>\$ (19,226)</b>

**CES Professional Designations Project**



# CES Members said...

## ***About the costs:***

- Estimated costs are reasonable
- Sliding scale of costs based on years of experience
- Value for money – market research done?
- Who pays & is it tax deductible?

**Appears the original cost estimates  
(application \$300-\$400 & renewal \$25-50) will  
not be a prohibitive factor.**





# Credentialed Evaluator (CE)

## *Costs*

- Application fee \$385
- CE membership + \$35 p/year
  - CES investment of \$38,865
  - Cost neutral in steady state
  - Based on 20% uptake = 316 current members and 82 p/year new CE members

***CES Professional Designations Project***



# Grand Parenting Provision

- Current CES Members (June 1, 2009)
- Educational requirement met with an undergraduate degree and 5 years experience
- No PLAR required
- Other 2 requirements apply
- Window of opportunity

***CES Professional Designations Project***



***THANK YOU***

***YOUR COMMENTS & QUESTIONS...***

***CES Professional Designations Project***

YEAAA  
CES!!!

