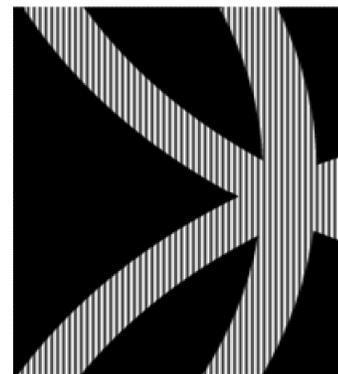


# Executive Summary

Systematic Review and Implementation Evaluation of the Canadian Evaluation Society's (CES) Essential Skills Series (ESS)

OCTOBER 2012



## BACKGROUND

### OVERVIEW OF THE CES ESSENTIAL SKILLS SERIES (ESS)

The original ESS program was developed in 1999 and has been updated several times since, as recently as 2009-2010. The ESS is designed to introduce and enhance program evaluation skills and promote the professional practice of evaluation across Canada.

Although developed and maintained by CES National, the regional Chapters of CES deliver the workshops for their local members. Evaluation professionals across the country facilitate the workshops for the regional chapters, based on a slide presentation and facilitator's manual for each of the four modules of the ESS. As part of each module there is an opportunity for group exercises (e.g. case studies) and discussion during the modules.

Given the number of revisions to the materials over a relatively short period a time, coupled with the varying needs of the different Chapters, it has become increasingly apparent that:

- Not all Chapters use the same materials (e.g., older versions still in circulation, modifications of new versions, etc.);
- Different delivery models are being implemented (e.g., 4 consecutive days, 2 days, 3 days/longer hours with pre-reading assignment, 1 day per week for 4 weeks, etc.);
- Different registration processes are being followed (e.g., all modules, one or more individual modules); and
- Different procedures are followed for providing a certificate. Some Chapters provide the list of participants to The Willow Group to produce certificates at the end of the Series (for the whole series), and some may be offering a certificate at the end of each workshop.

In addition to the variation in curriculum content and delivery format, informal feedback from Chapters and ESS facilitators have indicated that the ESS resource materials and instructional may warrant revision to better be able to meet the different professional learning needs across Chapters. All of these factors necessitated to the need to formally evaluate the ESS.

## METHODOLOGY

### OBJECTIVES AND SCOPE

As a result of the above noted variances and informal feedback received to date, the services of a qualified contractor were sought to conduct a systematic review and implementation evaluation of the Canadian Evaluation Society's (CES) Essential Skills Series (ESS) to determine what works well and what could be improved; identify the varying needs of CES Chapters; and propose potential options/approaches for revising the programming to have flexibility while maintaining a degree of consistency.

In terms of scope, the evaluation focused not only on the past (i.e. last 3 years) and present but also gave consideration to what is needed going forward. The results of this evaluation will support evidence-based decision making to inform the development of a subsequent Request for Proposal (RFP) to re-design the ESS.

The review examined the following key issues: ESS design and delivery; similarities and differences in delivery formats/processes between Chapters; variation in curriculum content and continued appropriateness/relevance of content; measuring impact and results; lessons learned; and areas for improvement.

Data collection methods primarily included extensive document review and fourteen key stakeholder interviews with ESS facilitators from a variety of CES Chapters.

## SUMMARY REFLECTIONS/RECOMMENDATIONS

An overview of the ESS evaluation summary reflections and recommendations follow. These findings and recommendations are expected to inform the development of a subsequent Request for Proposal (RFP) to improve the ESS's future design, delivery and impact

### ESS PURPOSE AND INTENT

- The delivery and marketing of the CES should be changed in order to more explicitly target new entrants to evaluation; and
- The CES should consider developing a more advanced course in evaluation to address advanced learning needs as well as offering the ESS tailored to key sectors as appropriate (e.g. Federal Government, Not-for-Profit, etc.).

### ESS DESIGN

- The CES should consider revising and updating the workshop format which would include involving an instructional designer (i.e. perspective of adult learning) along with a Subject Matter Expert or panel of evaluation experts for validation to:
  - Better define the learning objectives (in the format of “*At the end of this session, you will be able to...*”) while ensuring linkages/mapping with relevant sections in the CES PDP competencies and the CES Standards and Ethics;
  - Ensure harmonization of terminology throughout the ESS while removing redundancies and duplication between modules to facilitate better flow between elements;
  - Incorporate and apply best practices in PowerPoint;
  - Integrate more action-learning into the ESS (as opposed to lecture-based learning) including:
    - Better variety of case studies / those that are sector appropriate and reflective of the needs of each group (either by the facilitator or by participants) to foster real-world application and learning;
    - enhanced opportunities for practice and feedback; and
    - activities/exercises/quizzes
      - It would be beneficial to any ESS redesign efforts to evaluate the outcomes of the various approaches used by ESS facilitators to see which is having the greatest impact;
  - Develop and incorporate more of a summary/recap at the end of each Module;
  - In line with ever-greening initiatives, post both the modules and resource/reference materials online to foster self-study and preparation for the ESS; and
  - Add in reference material with alignment to major/current evaluation texts, materials of interest to each chapter and sector and a wide range of examples such as logic models, measurement and evaluation strategies/frameworks and evaluation reports etc.
  - Develop greater facilitator support materials including a revised Facilitator's Guide as well as a revised participant workbook.

#### **ESS DELIVERY STANDARDS**

- The suggested changes that facilitators make throughout this report call into question whether the workshop is being delivered based on national standards and whether this practice should be examined globally as part of any ESS re-design;
- The CES should consider requiring that participants attend the modules sequentially so as to not impact the potential for learning through the incremental application of concepts; and
- The CES should consider requiring a standard format for delivery at a national level while incorporating a better balance between days.

#### **ONGOING MONITORING AND EVALUATION**

- The CES should continually monitor and update the modules and reference material as the evaluation world changes and best practices emerge. When recommendations for change are brought forward by ESS facilitators it is also recommended that the CES respond to that feedback or explain why feedback has not been acted upon; and
- The CES should introduce a follow-up survey post ESS attendance to assess and track outcomes and impact of training and learning.