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100 Victory Lane
Ottawa, Canada

Canadian Evaluation Society
1485 Laperriere Avenue
Ottawa, Ontario K1Z 7S8

February 6, 2013

Re: Evaluation of the Canadian Evaluation Society Professional Designation Program

To Whom It May Concern:

It is the great pleasure of ICE Consulting to have the opportunity to respond to your request for an evaluation of the innovative Canadian Evaluation Society Professional Designation Program (PDP).

ICE members are proficient in a wide range of data collection and analysis methods, allowing for a comprehensive assessment of program techniques and results.

Enclosed you will find our evaluation proposal. The evaluation strategy outlines the issues of greatest interest. The evaluation strategy includes:

- An overview of the PDP program
- The major focus and objectives of the evaluation
- Recommended methods of data collection and an explanation of their benefits and limitations
- An evaluation matrix
- Potential challenges and our proposed solutions

If you have any further questions regarding our evaluation plan, please do not hesitate to contact us. Thank you for your consideration and we look forward to hearing from you.

Sincerely,

ICE Consulting Inc.

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Evaluation Framework for the Canadian Evaluation Society Professional Designation Program

Prepared for:
Canadian Evaluation Society
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Background/Program Profile

The Canadian Evaluation Society (CES), since its inception in 1981, has promoted leadership, knowledge, support and professional development within the field of evaluation (CES, n.d.; Mowbray, 1990). According to the CES (2009) there is currently no legal protection of the term "program evaluator", so there are no restrictions on who may refer to themselves as a program evaluator. The Professional Designation Program (PDP) was developed by the CES in an attempt to professionalize the field of evaluation through the use of professional designations. The PDP is focused on identifying and promoting ethical and proficient evaluation practices in Canada.

The CES permits evaluation practitioners to apply for the professional designation of Credentialed Evaluator (CE). In fact, the CES will be the first organization in the entire world to offer a professional designation of CE (CES, 2009). The PDP ensures the education level and work experience of an individual is sufficient to obtain the designation of CE. A designation of CE obtained through the PDP indicates that an individual not only has sufficient education and work experience to be competent in the field of evaluation, but that they are also continuously developing their evaluation skills.

There are three requirements to obtain the designation of CE:

- Graduate studies (degree or certificate)
- Minimum of 2 years of work experience relevant to evaluation within the last 10 years
- Alignment of education and/or experience with specific competencies in the Competencies for Canadian Evaluation Practice

In addition, those who hold the designation of CE must complete 40 hours of professional development over a three year period in order to retain their designation.

The CES (2009) suggests that the professional designation of CE may benefit employers of program evaluators when selecting candidates. In addition, a CE designation will allow job candidates to demonstrate their competency and commitment in the field of evaluation (CES, 2009). Furthermore, CES (2009) contends that organizations that use evaluation services could use the CE designation as part of the bidding procedure to assess evaluation proposals.

Program Logic Model

The logic model provided to us in the appendix of the RFP will be used to plan and guide the evaluation of the PDP program.

Purpose and Objectives of the Evaluation

As stated in the PDP Monitoring and Evaluation Plan, an evaluation of the program must be initiated in year three of the program. The purpose of the evaluation is to determine whether the PDP has been implemented as planned and is having the desired impacts. These objectives include:

- To create and respond to the demand for professional designations
- To ensure the CE designation, CES Ethics, Standards and Competencies reflect current and best practice
- To ensure a sustainable infrastructure for the PDP

The results of this evaluation will be used by CES National Council to improve the PDP.

Approach to Evaluation

Our evaluation team is dedicated to working with CES stakeholders to identify key objectives and goals. For the purpose of the proposed evaluation, we suggest the formation of a Working Group (WG) with the Program Designations Core Committee and one of our consultants. The WG will convene for monthly updates via teleconference.

We will use a mixed-design approach to address purpose of this evaluation. Part of our design will use a process evaluation approach with an aim to assess the degree to which the PDP strategy is implemented in full. We will also use an outcome evaluation to assess the immediate and intermediate impacts of the PDP.

It is also important to note that our firm highly regards and adheres to the program evaluation standards as outlined on the CES website (<http://www.evaluationcanada.ca>):

1. **Utility Standards:** The utility standards are intended to ensure that an evaluation will serve the information needs of intended users.
2. **Feasibility Standards:** The feasibility standards are intended to ensure that an evaluation will be realistic, prudent, diplomatic, and frugal.
3. **Propriety Standards:** The propriety standards are intended to ensure that an evaluation will be conducted legally, ethically, and with due regard for the welfare of those involved in the evaluation, as well as those affected by its results.
4. **Accuracy Standards:** The accuracy standards are intended to ensure that an evaluation will reveal and convey technically adequate information about the features that determine worth or merit of the program being evaluated.

Data Collection Methodology

Document review

Purpose: To obtain impression of how the program operates without interrupting the program. Evaluators will look at applications, finances, minutes, memos, annual reports, and accountability reports to get information that is encompassing and historical.

Advantages:

- Get comprehensive and historical information
- Does not interrupt program or client's routine in program
- Information already exists
- Few biases about information
- Broad coverage over time

Challenges:

- Often takes much time
- Info may be incomplete
- Need to be quite clear about what looking for
- Data is restricted to what already exists
- Can have reporting biases
- Access might be blocked

Key Informant Interviews

Purpose: To fully understand someone's impressions or experiences, or learn more about their answers to questionnaires. Key informant interviews will be conducted over the telephone and face-to-face with stakeholders and beneficiaries as determined. This will enable evaluators to access targeted information and to clarify stakeholders' perspectives and concerns. Interviewees will be identified and contacted through collaboration with the CES and PDP personnel.

Advantages:

- Get full range and depth of information
- Get targeted information
- Develops relationship with client
- Can be flexible with client

Challenges:

- Time consuming/costly
- Can be hard to compare responses
- Interviewer can bias client's responses
- Inaccurate recall

Surveys

Purpose: To quickly and/or easily get lots of information from people in a nonthreatening way. It is easy to conduct comparisons and analyses with surveys. Our team will conduct research to assess whether existing questionnaires can be used. While surveys need to be worded carefully and can potentially get inaccurate information, we have used both existing surveys and created surveys before, and so is well-versed in question order and wording. Furthermore, it is acknowledged that surveys do not allow of in-depth exploration of answers and can seem impersonal.

Web-based survey

Advantages

- Short
- Inexpensive
- Low social desirability
- Anonymous
- Higher selection concerns

Challenges

- Do not establish rapport
- Do not really know who is responding

Detailed Description of Web-based survey and Data Analysis

The web-based survey will target CES members and employers of evaluators-such as government and evaluation firms. It will be available as a link in an email distributed to all current CES members and CEs.

The survey will be generated using Survey Monkey, a web-based tool used by many survey researchers. Sample questions can be reviewed below.

1. Are you aware of the Professional Designation Program offered by the Canadian Evaluation Society? (Yes/No)
2. Do you believe the PDP improves the standing of the Canadian evaluation practices? (Yes/No)
3. Do you believe that the PDP is useful? (Yes/No)
4. Are there other ways that the CES could address the idea of standardized evaluation practices? (Yes/No)
5. What improvements can be made to the PDP program? (open-ended question)

This survey will be designed to collect both quantitative and qualitative data. Please see below for a description of our approach to data analysis.

Evaluation Matrix

The evaluation matrix was developed in accordance with the program logic model as referenced above. The purpose of the matrix is to highlight the specific evaluation issues, the indicators or data sources, and data collection methods we intend to use. Please see Appendix A.

Data Analysis

Our team will be collecting both quantitative and qualitative data from the methods described above. The quantitative data will be analyzed using descriptive and inferential statistical techniques available to us with SPSS Statistical software, version 17.0. The qualitative data will be coded for themes and analyzed using NVivo 8 software.

Timeline and Deliverables

Our focus throughout the estimated 6 months of evaluation is to keep the key stakeholders informed and involved. Therefore monthly Working Group meetings will be held via teleconference to update the PD Core committee on progress and possible challenges that arise. Towards the end of the evaluation process a draft report will be submitted to CES for review and editing. In the final month, all findings will be summarized in the final report and our team will travel to the CES headquarters to present our evaluation. Please see Appendix B for an overview of the timeline and estimated budget.

Potential Challenges

During the process of the evaluation potential challenges may arise. In the table below we present a few of these anticipated challenges and our recommended solutions.

Challenges	Solutions
1. Due to the nature of this evaluation it will be difficult for the evaluating consultants to remain objective	Consultants will be highly trained and interview questions will be pre-determined to avoid leading tendencies
2. Contact with non-CES members may be difficult to secure	Collaboration with employers, government agencies, and universities should expand our contacts
3. Timing may be difficult to estimate due to volunteer reliance for surveys and interviews	Monthly meetings with the Working Group will ensure that all parties are aware of possible deadline issues and compromises can be

	reached
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Appendix A. Evaluation Matrix

Evaluation Questions/Issues	Indicators	Methods
Relevance		
1. Is there a demand or need for the professional CE designation?	<ul style="list-style-type: none"> •opinions of stakeholder groups (students and regular members of CES, employers of evaluators-such as government and evaluation firms) 	<ul style="list-style-type: none"> •web survey •telephone interview with employers and university evaluation program contacts
2. Does the CE Designation, CES Ethics, Standards and Competencies reflect current and best practice?	<ul style="list-style-type: none"> •Descriptions of the PDP, and of other evaluation organizations (e.g. American Evaluation Association) •opinions of employers of evaluators-such as government and evaluation firms, and university evaluation program contacts 	<ul style="list-style-type: none"> •document review of PDP as well as current and best practices of other evaluation organizations •telephone interview
Efficiency		
<p>3. Has the implementation working plan been followed thus far?</p> <p>If not, what kinds of challenges have been experienced to prevent this?</p>	<ul style="list-style-type: none"> •PDP documents regarding implementation such as quarterly reports •opinions, perspectives and feedback of PDP personnel (project manager, application administrator, and credentialing board members, program VP) 	<ul style="list-style-type: none"> •document review of PDP •face-to-face interviews with program staff

Evaluation Questions/Issues	Indicators	Methods
Are the assumptions about assigned levels of effort for processing applications and renewals justified?	<ul style="list-style-type: none"> •time logs of Application Administrator and Credentialing Board members in comparison to initial projections •implementation budget 	<ul style="list-style-type: none"> •document review to facilitate data analysis of initial projections, implementation budget and time logs
Effectiveness		
4. Are the requirements for CE designation being enforced consistently?	<ul style="list-style-type: none"> •CE applications and subsequent memberships •Credentialing board, Application Administrator 	<ul style="list-style-type: none"> •document review of received applications, and accepted memberships •face-to-face interviews
Access and Reach		
5. Is communication and marketing (website, brochure, and weekly digest) meeting the needs of the PDP?	<ul style="list-style-type: none"> •website statistics (e.g. # of hits, # if reported problems) •brochure-(e.g. distribution volume and reach) •weekly digest-(e.g. distribution and interest) 	<ul style="list-style-type: none"> •document review of Application Administrator log, and documents provided by CES website administrator and internet service provider •document review of Application Administrator log •document review of Application Administrator log, and documents provided by authors of weekly digest and CES website administrator

Evaluation Questions/Issues	Indicators	Methods
Cost-Effectiveness		
6. Are there alternative programs that could meet the demands of program evaluation practitioners for less cost and better gain?	<ul style="list-style-type: none"> •opinions of stakeholder groups (regular members of CES, employers of evaluators-such as government and evaluation firms) •information from other evaluation organizations such as American Evaluation Association 	<ul style="list-style-type: none"> •web survey •telephone interviews with employers •document review and jurisdictional scan
7. How closely do PDP expenditures match the funding that was budgeted?	<ul style="list-style-type: none"> •budget documents •program staff 	<ul style="list-style-type: none"> •document review •face-to-face interviews
Impact		
8. Does the ratio of PDP Applications to CES Membership indicate sustainability of the PDP program?	<ul style="list-style-type: none"> •# of applications •# & % of current & new members applying 	<ul style="list-style-type: none"> •document review of PDP system
9. Has there been increased clarity and definition for and within the Canadian evaluation practice?	<ul style="list-style-type: none"> •opinions of stakeholder groups (students and regular members of CES, employers of evaluators-such as government and evaluation firms) 	<ul style="list-style-type: none"> •web survey •telephone interviews with employers and with university evaluation program contacts

Evaluation Questions/Issues	Indicators	Methods
10. Have external organizations expressed support, promotion, and use of the Canadian designation?	•opinions of stakeholder groups (employers of evaluators-such as government and evaluation firms)	•telephone interviews with employers and with university evaluation program contacts

Appendix B. Evaluation timeline and budget

Evaluation activities	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Budget
1. Monthly Working Group Meetings	X	X	X	X	X	X	\$1000
2. Document Review	X	X					\$2000
3. Key Informant Interviews		X	X				\$6,000
4. Web-based survey		X	X	X	X		\$5,000
5. Draft report submitted via email					X		\$1000
6. Final report and presentation of findings at CES headquarters						X	\$10,000
TOTAL							\$25,000

Appendix C. **Company Profile**

Established in 2000, ICE Consulting Inc. has grown to become one of the most successful independent management consulting firms in Canada.

Our team of experts is focused on Innovation, Collaboration, and Evaluation. We are dedicated to surpassing the expectations of our clients, bringing new ideas to the table while we work together to evaluate different programs and policies.

All of the consultants working for ICE Consulting Inc. have been selected based on expertise in the area of evaluation. Our members have worked on a wide array of projects including policy and program evaluation as well as needs assessment. All of our consultants bring a wealth of knowledge and experience to our team, making our company a leader in the industry of evaluation.

Recent Contracts:

Date: May 2009-present

Project Title: Evaluation of ABC Town Economic Development Plan

Client Name: Town of ABC

Contract Amount: \$200,000

Description:

Project results: Project not yet complete, but on track for budget and time deadlines

Date: September 2009-May 2009

Project Title: Trade Development Program for SMEs

Client Name: Town of ABC

Contract Amount: \$500,000

Description:

Project results: Project complete within timeline and budget

Date: August 2007-August 2009

Project Title: Evaluation of Foreign Investment Action Plan

Client Name: Government of Canada

Contract Amount: \$1,000,000

Description:

Project results: Deadline extended for 2 weeks for final report; project complete within budget

References

- Canadian Evaluation Society. (2009, September). Professional designations program. Retrieved February, 6, 2010, from http://www.evaluationcanada.ca/site.cgi?s=5&ss=6&_lang=en
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- George Mowbray, G. (1990, October). The Canadian evaluation society: Its first five years. Canadian Evaluation Society Newsletter, 10, 1-6
- Kerlinger, F.N., & Lee, H. B. (2000) Foundations of behavioral research (4th ed.). United States of America: Cengage Learning.
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