

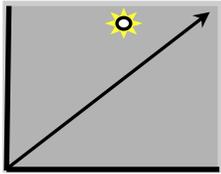
## **Outlier Consulting Group**

We Think Outside the Box

A Proposed Evaluation of The Canadian Evaluation Society Professional Designation Program

Prepared for: The Canadian Evaluation Society

February 6, 2010



# Outlier Consulting Group

2

We Think Outside the Box

February 6th, 2010

To: Canadian Evaluation Society

Re: Proposed Evaluation of the Professional Designation Program

Outlier Consulting Group is pleased to have the opportunity to work with Canadian Evaluation Society and facilitate the evaluation of the Professional Designation Program.

Program evaluation is an important activity that organizations engage in to enhance program functioning and to obtain valuable information that can be used for decision-making purposes. We commend the Canadian Evaluation Society for undertaking an evaluation of its programs and hope that the comprehensive evaluation plan developed by Outlier Consulting group meets your needs.

Our consulting team has extensive experience with regards to developing surveys, facilitating focus groups, conducting interviews, and carrying out records reviews. Therefore, our strong methodological abilities, coupled with our expertise evaluating administrative programs, will ensure the success of this evaluation.

It is our hope that this evaluation proposal will benefit the Canadian Evaluation Society. We thank you for this opportunity.

Sincerely,

Outlier Consulting Group

## **I. Program Overview**

The Canadian Evaluation Society Professional Designation Program (PDP) is a program created by the Canadian Evaluation Society (CES), which allows program evaluation practitioners to apply for a Credentialed Evaluator (CE) professional designation. This designation means that its holder “has provided evidence of education and experience to be competent” in the field of evaluation. The goal of the PDP is to define, recognize, and promote the practice of ethical, high quality, and competent evaluations in Canada through a program for professional designation in CES. The objectives include:

1. To create and respond to the demand for professional designations
2. To ensure the CE designations, CES Ethics, Standards and Competencies reflect current and best practice
3. To ensure a sustainable infrastructure for the Professional Designation Program

The CES launched the PDP three years ago and has been promoted through the CES website, the weekly CES Automatic Digest, and the new CES brochure. Evaluators who wish to receive CE designations complete online application forms, which are subsequently reviewed by program staff and Credentialing Board. Evaluators who have received CE designations are required to periodically attest to their commitment through continually updating their skills and completing 40 hours of professional development over three-years.

## **II. Purpose of Evaluation**

The purpose of the proposed evaluation is to determine whether the PDP has been implemented as planned and is having the desired impacts. Therefore, the research questions of the proposed evaluation address both the activities of the program as well as the desired outcomes. The results of this evaluation can be used by the CES National Council to improve to PDP.

## **III. Theoretical Approach**

Outlier Consulting Group will conduct a combination process/outcome formative evaluation on The Canadian Evaluation Society Professional Designation Program. A process evaluation will allow us to determine if the program has been implemented as planned and that it carries out its intended functions in the intended way (Rossi, Lipsey, & Freeman, 2004). Given that the program has only been implemented for three years it is important to verify if the program is running as it was intended. Additionally, with the inclusion of an outcome component, this will allow us to gauge the extent to which a program produces the intended results (Rossi, Lipsey, & Freedman). However, as mentioned the program was only launched three years ago, therefore only the immediate outcomes will be assessed and future evaluations will need to assess the longer-term goals.

The proposed evaluation will use a utilization-focused model to address the research questions. The utilization-focused model maintains the focus of the evaluation on the intended uses by the intended users (Patton, 2008). This model dictates that decisions will be made in collaboration with an identified group of primary users (Patton). Given this consideration, we suggest the creation of an evaluation steering committee, which will provide guidance and support throughout the proceedings of the evaluation. The steering committee should include representatives from the various stakeholders involved with program in order for all perspectives to be known.

#### **IV. Methodological Justifications**

The following methods are suggested based on feasibility and richness of data that they can provide. The methods were selected after careful research of methodology and evaluation texts. The final methodology framework comes out of recommendations of Rossi, Lipsey, and Freeman (2004) and Posavac and Carey (2007).

##### Records Review

Since the CES plans to deliver quarterly reports to the National Council via the VP, PDP, a large amount of data will be collected by the third year of the PDP when this evaluation will be taking place. This information will be readily available to be reviewed and can serve as the basis for the data collection.

- Monitoring data: The quarterly reports will be monitoring the PDP's process and progress in the terms of applications and decisions made about them, the IT system and website support, staff, advertisement and marketing of the program and budget. As a data source collected from within PDP, the monitoring data should be used as the main source of data for numerous evaluation questions and indicators, especially in the process evaluation portion because it is an economical way to obtain copious data.
- Financial reports: Records of fees paid by applicants will be reviewed and compared to overall expenses connected with running the PDP to indicate whether the fees sufficiently cover the expenses.
- Designation requirements: Records of CES will be reviewed to determine whether there have been any changes made to the designation requirements over the past two and half years of the program's delivery. This review is to answer questions about the updates and validation of the designation requirements, (i.e., whether or not it is being done and at what frequency).
- CES Ethics, Standards and Competencies: CES records will be reviewed to determine whether there have been any changes made to the CES Ethics, Standard and Competencies over the past two and half years of the program. This review is an efficient way to answer questions about the updates and validation of the designation requirements, (i.e., whether it is being done and at what frequency).

- Previous Plan Reviews: The plan for the review of PDP Ethics, Standards and Competencies will be reviewed to ensure that the plan exists. This review will benefit the evaluation by triangulating qualitative data with the quantitative data obtained from the interviews and focus groups.

#### Website review

The website will be reviewed to determine whether it advertises the PDP and whether it offers all necessary information for potential applicants regarding the requirements for being credentialed and also guidelines how to go through the application process step by step. The review will collect data on accessibility of information and accessibility and functioning of all related links and application submission process. As the website is one of the main communication points between PDP administration and evaluators, it is necessary to ensure that this program is advertised on it.

#### Repository review

As a part of the process evaluation, the evaluating team will review the actual repository of the PDP to collect information on whether, and in what manner, the repository is managed. Due to feasibility issues of reviewing all repository records, a key informant interview will also be used to provide perceptions of how well the repository is being managed. Since there is a limited scope as to what the evaluators can do, the interview will be a useful additional data source. The interview will also provide a useful perspective on what effective management of the repository means to PDP administration.

#### Key Informant Interviews

Key informant interviews will be conducted with the Vice President for PDP and members of the Credentialing Board. The number and characteristics of interviewed board members will depend on the actual composition of the Credentialing Board at the time of conducting the evaluation. These interviewees were selected as they represent staff of PDP who is responsible for keeping, reviewing, updating and validating the designation requirements and the CES standards, ethics and competencies. Information collected via these interviews will be beneficial in to determining whether any changes (updates and validation) were made to designation requirements and CES requirements for ethical standards and competencies.

The VP, PDP will also be interviewed to obtain information on recruitment practices and problems, including turnover of support staff. According to the Monitoring and Evaluation Plan, the VP is responsible for keeping records on staffing and is, therefore, perceived as the most appropriate source of information. The VP will also be asked about the current state of the review plan to determine whether a fixed, standardized plan for reviewing the CES ethics, standards and competencies was established.

### Survey of CE Members

Survey of CE members represents a significant part of the proposed methodology as CE members are the actual users of the PDP. As clients, they are significant stakeholders in the program and their perspectives and opinions should be considered. A detailed description of this survey is provided below in Section V.

### Focus Group

Two separate focus groups will be conducted. The first one will invite members of the Credentialing Board to talk about their perceptions of the current state of the review plan. The participants of this focus group will be integral in providing information on whether a fixed, standardized plan for reviewing the CES ethics, standards and competencies was established.

The second focus group will be conducted with PDP staff and will collect information on how the systems, processes and human resources are managed and organized and whether this management and organization are sufficient to meet the requirements of the PDP. The PDP staff was selected for the focus group because they are the first contact for applicants and provide support to them, and because they review the applications before passing it over to the Credentialing board. Their experiences are, therefore, valuable source of information and a necessary group to include in the data collection.

### Utilization of the Results

The results from this evaluation will provide an answer to whether the PDP was implemented in the intended way and whether the immediate outcomes were met. The findings will provide possible suggestions and directions for improvements of the program.

## **V. Detailed Description of Survey Methodology**

The survey of current CE members will provide data to answer evaluation questions 8 and 11, including the important indicator of how satisfied CE members are with PDP and the administrative support they received. The survey will be web-based in order to reach a geographically diverse sample and will be quantitative for the ease of conglomerating data from a large number of respondents. A sample of the potential survey items and format is provided below.

The following steps will be taken to implement the CE members' survey and are based on Dillman's (2000) recommendations:

1. Develop survey based on input from credentialing board and application administrator regarding aspects of PDP to assess for CE member satisfaction and perceived support
2. Obtain list of CE member e-mails (application records)
3. Take a random sample of CE member e-mails

4. First e-mail notification: Send sample e-mails notifying them that they have been selected for a survey and the purposes of the survey
5. Survey distribution: Send sample e-mails with a link to the survey requesting their participation
6. Survey Reminder/Thank you: 5 days later, send sample an e-mail which thanks them for completing the survey, if they have, and reminds them to complete it if they have not
7. Replacement Survey: 5 days later, send sample who have not completed the survey an e-mail reminding them to do so with the link to the survey
8. Two weeks after the replacement survey was delivered data collection will cease and data analysis will begin, based on diminishing returns expected for web-surveys

After the data has been collected, it will be analyzed to answer evaluation questions 8 and 11.

To address Evaluation Question 8:

- Mean scores for each satisfaction item will be computed and compared with an *F*-test and post-hoc comparisons to indicate which areas of PDP can be improved on
- Summary satisfaction scores will be computed for each respondent which will then be correlated with length of membership to provide an indication of whether perceptions of PDP improve with length of membership

To address Evaluation Question 11:

- Three mean scores based on items assessing perceived supportiveness of various administrative areas (systems, processes, and human resources) will be calculated across respondents and compared with an *F*-test and post-hoc comparisons to indicate which areas can be improved upon
- Frequency of endorsement of items addressing potential improvements to PDP administration will be compared via Chi-Square analyses to indicate preferred improvements to PDP

## **VI. Potential Challenges and Proposed Solutions**

1. Challenge: The proposed records reviews rely on the assumption that comprehensive records are kept as well as frequently updated.  
Solution: Due to the fact that the program has been monitored, it is assumed that accurate records have been kept for these purposes. In addition, the absence of data is useful to the evaluation per se as it representative of whether the records keeping process is occurring as planned.
2. Challenge: The key informant interviews are with stakeholders who may have a vested interest in the program and, thus, provide biased responses.  
Solution: Where possible, triangulation has been used to improve the quality of the data.

That is, key informant interviews have been supplemented by other methods (e.g., records reviews) in order to add insight to the qualitative data.

3. Challenge: Focus groups can be difficult to coordinate when dealing with people with diverse backgrounds and schedules. Also, since participants are responding in the presence of co-workers, they may be less likely to express their true opinions.  
Solution: One focus group consists of program staff which means that the focus group could, ideally, be conducted during business hours which should alleviate scheduling problems. Coordinating board members would be more difficult but the focus group could possibly be scheduled around a time where the board meets together as a group (e.g., quarterly meetings, conferences). Since the topics discussed in the focus groups are not among particularly sensitive in nature, it is assumed that participants will be open and honest despite being in a group setting. Again, the use of triangulation will help to verify this method.
  
4. Challenge: Surveys should be valid and reliable in order to elicit useful data. Further, a poor response rate may be a potential concern.  
Solution: The program evaluators have received graduate training in survey methodology and are familiar with the concepts and issues in creating valid and reliable survey measures. Since our respondents are also familiar with program evaluation, they will, presumably, be more willing to take part in an evaluation and add insight into improving the program implementation. If response rate is a serious concern, however, some type of incentive could be used to bolster the amount of respondents.

**Table 1: Methodology Matrix**

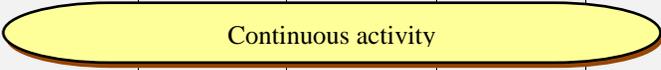
| <b>Evaluation Questions</b>  | <b>Indicators</b>   | <b>Method &amp; Data Source</b>  | <b>Justification</b>  |   |
|--|---|--|---|---|
| <b>Activities</b>  |   |  | <b>Advantages</b>   | <b>Limitations</b>  |
| 1. Is the CE being marketed to members and stakeholders?                   | <ul style="list-style-type: none"> <li>• Website and digest promotions</li> <li>• Development and distribution of brochure</li> </ul> | <ul style="list-style-type: none"> <li>• Review of website and digest promotions</li> <li>• Records review of monitoring data</li> </ul>   | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>   | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |
| 2. Are CE applications, renewals, and appeals being processed?             | <ul style="list-style-type: none"> <li>• # of applications, renewals, and appeals being processed</li> </ul>                          | <ul style="list-style-type: none"> <li>• Records review of monitoring data</li> </ul>  | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>   | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |
| 3. Have CE designations been updated and validated?                        | <ul style="list-style-type: none"> <li>• # of updates and validations</li> <li>• Perceptions of updates and validations</li> </ul>    | <ul style="list-style-type: none"> <li>• Records review of designation requirements</li> <li>• Key informant interviews with VP and Credentialing Board members</li> </ul>               | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> <li>• Interviews will provide rich and detailed data</li> <li>• Multiple methods</li> </ul> | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> <li>• Self-report</li> </ul> |
| 4. Have CES Ethics, Standards and Competencies been updated and validated? | <ul style="list-style-type: none"> <li>• # of updates and validations</li> <li>• Perceptions of updates and validations</li> </ul>    | <ul style="list-style-type: none"> <li>• Records review of CES Ethics, Standards and Competencies</li> <li>• Key informant interviews with VP and Credentialing Board members</li> </ul> | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> <li>• Interviews will provide rich and detailed data</li> <li>• Multiple methods</li> </ul> | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> <li>• Self-report</li> </ul> |
| 5. Are PDP fees being collected?   | <ul style="list-style-type: none"> <li>• # of fees collected with respect to # of CE members</li> </ul>                               | <ul style="list-style-type: none"> <li>• Records review of financial reports</li> </ul>  | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>   | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |

|  |  |   |  |   |
|--|--|---|--|---|
| 6. Is the PDP repository being managed?  | <ul style="list-style-type: none"> <li>• Perception of repository management</li> <li>• Degree of repository management</li> </ul>                                   | <ul style="list-style-type: none"> <li>• Key informant interview with Application Administrator</li> <li>• Review of repository</li> </ul>                                | <ul style="list-style-type: none"> <li>• Interviews will provide rich and detailed data</li> <li>• Multiple methods</li> </ul>   | <ul style="list-style-type: none"> <li>• Self-report</li> <li>• Limited scope of repository review</li> </ul>             |
| 7. Are the human and technology resources of the PDP being managed?                  | <ul style="list-style-type: none"> <li>• Ease of recruiting</li> <li>• Turnover</li> <li>• # of reported problems</li> <li>• # and nature of changes made</li> </ul> | <ul style="list-style-type: none"> <li>• Records review of monitoring data</li> </ul>   | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>  | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |
| <b>Outcomes</b>  |  |   |  |   |
| 8. Are members satisfied with the PDP?   | <ul style="list-style-type: none"> <li>• Perceived satisfaction</li> </ul>   | <ul style="list-style-type: none"> <li>• Surveys of CE members</li> </ul>   | <ul style="list-style-type: none"> <li>• Large sample size</li> </ul>  | <ul style="list-style-type: none"> <li>• Self-report</li> </ul>   |
| 9. Is there a demand for CE designation?   | <ul style="list-style-type: none"> <li>• # of people applying for CE</li> </ul>  | <ul style="list-style-type: none"> <li>• Records review of monitoring data</li> </ul>   | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>  | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |
| 10. Has CES adopted a plan for the review of PDP Ethics, Standards and Competencies? | <ul style="list-style-type: none"> <li>• Plan existence</li> <li>• Perceived plan effectiveness</li> </ul>   | <ul style="list-style-type: none"> <li>• Records review of previous plans</li> <li>• Focus group with Credentialing Board members</li> <li>• Interview with VP</li> </ul> | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> <li>• Interviews and focus groups will provide rich and detailed data</li> <li>• Multiple methods</li> </ul> | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> <li>• Self-report</li> </ul> |

|   |   |   |  |   |
|---|---|---|--|---|
| 11. Do the systems, processes, and human resources support the demand for the CE? | <ul style="list-style-type: none"> <li>• Perceived support</li> <li>• Waiting time for CE membership</li> </ul> | <ul style="list-style-type: none"> <li>• Records review of waiting times</li> <li>• Focus group with PDP staff</li> <li>• Survey of CE members</li> </ul> | <ul style="list-style-type: none"> <li>• Focus groups will provide rich and detailed data</li> <li>• Large sample size from surveys</li> <li>• Multiple methods</li> </ul> | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> <li>• Self-report</li> </ul> |
| 12. Is the PDP cost neutral?  | <ul style="list-style-type: none"> <li>• Fees exceed PDP costs</li> </ul>                                       | <ul style="list-style-type: none"> <li>• Records review of financial records</li> </ul>   | <ul style="list-style-type: none"> <li>• Records are easily accessible</li> </ul>  | <ul style="list-style-type: none"> <li>• Relies on quality of previously collected data</li> </ul>                        |

**Table 2: Timeline and Budget Plan**

The table below provides outline of time framework and budget for the proposed evaluation.

| Evaluation Tasks   | Timeline   |          |          |          |           | Budget<br>Daily rate: \$1000 <sup>1</sup> |               |
|--|--|----------|----------|----------|-----------|---|---------------|
|  | Week 1-2   | Week 3-4 | Week 5-6 | Week 7-8 | Week 9-10 | # of days <sup>2</sup>                    | Total in \$   |
| Development of measures                                    | □  |          |          |          |           | 2   | 2000          |
| Focus groups   |  |          | □        |          |           | 1   | 1000          |
| Key informant interviews                                   |  | □        |          |          |           | 1   | 1000          |
| Records review   | □  | □        |          |          |           | 5   | 5000          |
| CE survey  |  | □        | □        |          |           | 1   | 1000          |
| Analysis of collected data                                 |  |          | □        | □        |           | 5   | 5000          |
| Report writing   |  |          |          |          | □         | 3   | 3000          |
| Data dissemination   |  | □        |          | □        | □         | 1   | 1000          |
| Evaluation team's costs<br>(transportation, materials,...) |  |          |          |          |           |   | 6000          |
|  |  |          |          |          |           | <b>Total cost</b>                         | <b>25 000</b> |

<sup>1</sup> rate for 4 members of the team working 8 hours per day

<sup>2</sup> the number of days reflects the total amount of hours spent on the task by members of the team divided by 8 hours per day and by the number of team members working on the task

### Appendix 1: Sample Survey Items

Please respond to the following statements by circling the number that represents how satisfied you are where **1 = very unsatisfied**, **2 = a little unsatisfied**, **3 = neither satisfied nor unsatisfied**, **4 = a little satisfied**, and **5 = very satisfied**.

**1.** Overall, how satisfied are you with your PDP experience?

|                     |                      |                                      |                       |                   |
|---------------------|----------------------|--------------------------------------|-----------------------|-------------------|
| 1                   | 2                    | 3                                    | 4                     | 5                 |
| very<br>unsatisfied | a little unsatisfied | neither satisfied nor<br>unsatisfied | a little<br>satisfied | very<br>satisfied |

**2.** How satisfied are you with the PDP web-site?

|                     |                      |                                      |                       |                   |
|---------------------|----------------------|--------------------------------------|-----------------------|-------------------|
| 1                   | 2                    | 3                                    | 4                     | 5                 |
| very<br>unsatisfied | a little unsatisfied | neither satisfied nor<br>unsatisfied | a little<br>satisfied | very<br>satisfied |

**3.** How satisfied are you with PDP's administrative support?

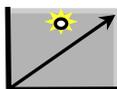
|                     |                      |                                      |                       |                   |
|---------------------|----------------------|--------------------------------------|-----------------------|-------------------|
| 1                   | 2                    | 3                                    | 4                     | 5                 |
| very<br>unsatisfied | a little unsatisfied | neither satisfied nor<br>unsatisfied | a little<br>satisfied | very<br>satisfied |

**4.** How satisfied are you with the credentialing process?

|                     |                      |                                      |                       |                   |
|---------------------|----------------------|--------------------------------------|-----------------------|-------------------|
| 1                   | 2                    | 3                                    | 4                     | 5                 |
| very<br>unsatisfied | a little unsatisfied | neither satisfied nor<br>unsatisfied | a little<br>satisfied | very<br>satisfied |

**Please select the three (3) changes to the PDP that would enhance your satisfaction with it the most:**

- Help hotline
- More informative application instructions
- More user-friendly web-page interface
- Forums describing the CE application process at CES conferences
- Faster application reviews



## References

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Posavac, E.J., & Carey, R.G. (2007). *Program evaluation: Methods and case studies* (7th ed.). Upper Saddle River, NJ: Pearson Education.

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