Launching the Credentialed Evaluator (CE) Designation

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Abstract: How do you make a professional designation program happen within one year? What resources, processes, systems, and structures are required? This article describes how the Canadian Evaluation Society (CES) implemented its national Credentialed Evaluator (CE) program through the dedication of volunteer members of the CES. The interdisciplinary nature of evaluation practice shaped the development of systems, policy, administrative procedures, governance, and management for the credentialing process. Consideration of political issues and communication with the stakeholder community were essential to the credibility of the implementation process.

Keywords: administration, designation system, implementation, infrastructure, operational, process

Résumé : Comment mettre sur pied un programme de titres professionnels en une seule année? Quelles ressources et structures, quels processus et systèmes sont nécessaires? Cet article décrit le processus d’implantation du titre d’Évaluateur accrédité, grâce au dévouement de membres bénévoles de la Société canadienne d’évaluation. La nature interdisciplinaire de l’évaluation a façonné la conception d’un système, de politiques, procédures administratives, gouvernance, et gestion pour le processus d’accréditation. La crédibilité du processus de mise en place a été soutenue par la prise en compte essentielle des enjeux politiques et de la communication avec la communauté d’intervenants.

Mots clés : administration, système des titres, implantation, infrastructure, opérationnel, processus

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A thunderous standing ovation from more than 700 CES members at the 2009 Ottawa Conference confirmed “Yes” to the CES Credentialed Evaluator (CE) designation. Thus began the journey of launching the CE designation process based on the fundamental principles of inclusiveness, partnering, utility, feasibility, and transparency in place since the planning stage (Buchanan, 2015). Every aspect of the CE designation process had to be operationalized by the next annual conference. This article, written from a phenomenological tradition, describes the various issues that needed to be collaboratively addressed, resolved, and operationalized with limited resources to implement the CE designation, and they will contribute to building knowledge about professionalization of evaluation.

CREDENTIALED EVALUATOR PROPOSAL TO PROFESSIONAL DESIGNATIONS PROGRAM

When the CE proposal was approved in 2009 by the CES National Council, the initiative moved from a project to a CES Professional Designations Program (PDP) that required an appropriate CES infrastructure and the collaborative efforts of the whole council. During the May 2010 National Council meeting, the CES President and Council endorsed the appointment of a two-year Vice President, Professional Development Program (VP-PDP) to oversee the implementation of the PDP (Professional Designations Project Core Committee, 2009). The VP-PDP recommended the establishment of a small advisory group, comprising key players from the project volunteers or Council, to act as a sounding board for the VP and project staff. This allowed the PDP to operate with ongoing collaborative support from various experts. Every step of the PDP process was new, and several activities had to take place simultaneously. The first task for the VP-PDP was to find a project coordinator who would provide leadership and drive the implementation process. This paid position alleviated some of the volunteer effort needed and allowed the program to be up and running quickly, thus keeping the momentum that had built up during the design phase.

BECOMING A CREDENTIALED EVALUATOR (CE)

There would be three qualifications for the Credentialed Evaluator (CE) designation: an educational requirement, experience requirement, and alignment of education and experience with evaluation competencies (Canadian Evaluation Society, 2010a). Each had to be operationalized in a manner that was clear for both applicants and CE decision makers.

For the education requirement, applicants must have a graduate-level degree or certificate from a postsecondary institution listed by the Association of Universities and Colleges of Canada. Applicants are asked for the name of the university or college, degree or certificate, date that it was conferred and years attended, and specialization (if applicable). Applicants can scan their diploma or certificate and upload it to an online portal. For applicants who completed their graduate work
outside Canada, there are links to an International Degree Equivalencies tool. For applicants who have not completed a graduate degree or certificate but believe their experience is equivalent to graduate work (Ontario Ministry of Training, Colleges and Universities, 2009), there would be the possibility of submitting a Prior Learning Assessment and Recognition (PLAR) for a separate fee (Canadian Evaluation Society, 2010b).

For the experience requirement, applicants must have two years (full-time equivalent) evaluation-related work experience within the last 10 years and are asked to provide statements of work experience supported with letter(s) of reference. Applicants are asked to briefly describe the highlights from their work and work-related experience in evaluation. This may include such categories as employment (including teaching), practicum (such as work-based experiential learning including internships, practicum, and evaluation work for thesis), volunteering for a not-for-profit doing evaluation, and any other work experience in evaluation (Canadian Evaluation Society, 2010b).

For each category, the applicant provides the position title and briefly describes the main responsibilities, the type of evaluation activities undertaken, the name of the employer or organization, and the duration of each evaluation work-related experience. The applicant is also asked to include a completed Reference/Sponsor form attesting to the accuracy of the length and description of work experience that has been presented (Canadian Evaluation Society, 2010b).

To demonstrate the relevance of education and/or experience to at least 70% in each of the five domains of Competencies for Canadian Evaluation Practice, applicants are asked to declare achievements under each domain by checking the competencies they have attained and draw selectively from their education and/or professional experiences to provide evidence of alignment to at least 70% of the competencies in each of five domains (Canadian Evaluation Society, 2010b).

The applicant need not have both experience and education related to a competency, but should demonstrate evidence of the competency through education (including training), through experience, or in combination. When writing the narrative on selected competencies and information on relevant education or professional training, applicants might include the name of the program, course and/or number, and the name of the postsecondary institution or organization providing the learning opportunity. When citing experience relevant to a competency, applicants might mention employment, teaching, practicum, thesis work, volunteer activities, and other forms of work (Canadian Evaluation Society, 2010b).

The online application process was developed so that the process could be completed over time and the application submitted when all required information is provided and the terms of the CE designation signed. Applicants are notified if the application is incomplete or if they require additional education or experience requirements. If complete, the application is sent to the Credentialing Board (CB) for review. If the reviewers recommend that an application be denied, the candidate is given advice on how to strengthen the application. Unsuccessful candidates can submit a revised application any time within three years following the set-up
of their account. Appeals can be registered by applicants within 30 days of being notified they have been denied the CE or have received a decision that further preparation is needed. Applicants are encouraged to review and improve their application for the appeal. Appealed decisions are considered by two reviewers, with a third reviewer consulted if the first two are not in agreement. Development of the details of the application and the assessment process greatly benefitted from the knowledge and expertise of CES volunteers (Borys, Gauthier, Kishchuk, Roy, 2005; Cousins, 2006). The steps are depicted in Figure 1: CES Professional Designations Program Application Process.

**THE TECHNOLOGY FRAMEWORK**

The technology to process the CE applications, renewals, and appeals was primarily online. CES required professional assistance to apply available technologies for online processing of applications and reviews, and for extracting information from the CES membership database. One of the first major tasks of the PDP project coordinator was to hire a web developer to create the PDP website. The site had to respond to the needs of applicants, Credentialing Board members, the project staff, and credentialed evaluators. Applicants required access to a secure web interface to submit payments, prepare the application, upload evidence to support the application, and receive feedback. Credentialing Board members required access to a secure web interface to review applications and documents and to submit their assessments. The administrator required access to the member database and functions to support, control, and troubleshoot the system. Credentialed Evaluators needed a site where they could record and upload information on their professional development activities as required for maintaining the designation.

The web developer worked closely with the project coordinator to confirm and further specify the required online functionality. Advices from an information technology (IT) expert helped with many web-related questions and provided advice to the CES National Council, the PDP project coordinator, and the web developer. The PDP web application was developed on a new dedicated server that could accommodate growth. The Internet providers would provide reliable service and ensure data integrity and security. All functions were to respect common database and web application conventions to support the PDP process depicted in Figure 1.

The web developer was tasked with building a user-friendly, high-quality web application in a cost-effective manner following web application design industry standards and meeting CES budget costs and schedules. While the application submission and review process were being operationalized, the fine details of the PDP-related policies and web texts continued to be refined by various CES member volunteers and approved by the National Council. These documents included the Credentialing Board Terms of Reference and Role and Responsibilities; Privacy Policy from the CES Administrative Committee; the Terms of Reference for the PDP Application Administrator; the PDP Application Guide; and texts and forms that would appear in the PDP website. Other documents included the
Figure 1: CES Professional Designation Application Process
PDP text for the CES home page that introduced the CE designation, application support materials such as examples of narratives on competencies, and communication materials. All web content underwent discussion and approval. Early in the website development phase, a decision was made to first develop and test the English site. This was no easy task, as all of the outstanding text required for error messages and corrections had to be identified.

For the French-language version of the site, the translation of text, especially the Competencies for Canadian Evaluation Practice, needed to be refined extensively and repeatedly by French evaluators to address the nuances of the professional/technical language. Ultimately an academic who teaches evaluation in Quebec fine-tuned the French document, which was then endorsed by the francophone members of the CES National Council. Once all the web content was translated, the web developer continued to build the French site.

The launch date for the PDP website was set for May 2010 with the first release in English and the French version shortly after. CES was responsible for providing all page content, page layouts, colours, and image art such as logos. This meant that every step depicted in the PDP process diagram required texts and reference materials in both English and French presented in a user-friendly manner. The site had to work effectively and retain all data that the applicants and reviewers provided. This was accomplished within a budget that was under $10,000 in approximately 6 months for the IT expertise, excluding the cost related to the server contracts.

**PROGRAM FINANCIAL MANAGEMENT**

The PDP requires an annual cost-neutral budget that takes into account forecasts of revenue and expenditures and is designed to be fully incorporated into CES budgeting processes. In steady state, it is funded through fees for CE applications and annual renewal of a CE designation (Professional Designations Project Core Committee, 2009). Determination of the CE application fee was based on sustaining the program including the provision of administrative support, the cost for the Internet site, web support, and other costs associated with the program.

Initially, the plan was to connect the CE application fee payment, the CES membership database, and the PDP internet portal.

The initial set-up for payment of fees resulted in applicants experiencing delays in receiving their CE account information. This took place in 2010 when online payment was fairly expensive for small organizations like the CES. The $485 application fee is a one-time, nonrefundable expense for processing the application and its review. Once awarded, CEs are required to pay an annual $50 maintenance fee in addition to the annual membership. The CES Treasurer assists the PDP in working with the planned revenue and operating expenditures defined in the 2009–2010 budget proposals. The VP-PDP was also supported in financial planning by frequent reports on revenues and expenditures, which helped in the development of a budget for Year 2, based on first-year experience. PDP represents
a major service change for the organization and forced CES to re-examine how the organization operated. For example, at the beginning of the PDP development process, it was found that when a CE applicant paid the application fee, verification of membership status and data had to be done manually. Initially CES hoped for a CE application payment system that could verify membership status with the general CES membership database. However, due to administrative contractual obligations, the CES National Council decided to put the work on hold.

RESOURCING THE PDP

The CES hired a PDP Application Administrator whose role is to ensure that a systematic and fair CE designation process is established and implemented with the support of the webmaster. As well, the position is responsible for ensuring that the Credentialing Board (CB) is informed of aspects necessary to sustain its effective operation. The PDP project coordinator, web developer and VP trained the Application Administrator. However, immediately before the launch of the CE designation website in May 2010, the project coordinator received an offer for a full-time position, and the finalization of the resources necessary for the launch fell on the VP-PDP and the new Application Administrator. The launch remained on schedule thanks to a collaborative effort of dedicated CES members. The Application Administrator worked on an operational procedures manual to ensure continuity when there was a change in incumbent. Figure 2 outlines the CES organizational chart during the PDP start-up and operationalizing period to June 2013.

CREDENTIALING BOARD (CB)

The CES President worked with the Council to establish a Credentialing Board (CB) in time for the launch of the PDP. The President sent letters to all CES Fellows and winners of CES awards to offer an honourary CE designation and invitation to join the CB. The CB’s role is primarily to make fair, timely, and equitable decisions on applications and appeals for a CE, using guidelines and criteria established by CES National Council. More than a dozen Canadian evaluation experts accepted the challenge of forming the first CB. During the PDP proposal development stage, the Terms of References to establish the CB was drafted collaboratively by the Infrastructure subcommittee with input from CES member volunteers and approval by the National Council. Three key internal documents related to the CB were developed:

- **CB Terms of Reference**, which define the Role and Responsibilities, Board Membership, Communication and Accountability, Time Commitment, and Entitlements.
- **CB Procedures**, which include Procedures for Credentialing Review, Procedures for Reviewing Appeals, CES Guidelines for Ethical Conduct and
Figure 2: CES Organizational Chart During the Operationalizing of PDP (to June 2013)
Confidentiality, Communication and Reporting Requirements, Orientation and Training of New CB Members, Time Commitment, Frequency of Meetings and Entitlements, Board Member Appointment, and Reappointment.

- **CB Guide for Reviewing the Application for CES Credentialed Evaluator (CE)**, which provide the definition for the CE Designation and articulate the Application Review Process.

Members of the CB, using the PDP Internet-based portal, can review the applications from anywhere in the world. A mock application was set up so that the CB members could review it, enter their assessments online, and discuss them through teleconferencing and discussion forums. Six weekly sessions were conducted from May 25 to June 29, 2010, with the discussions summarized by the President and posted on the CB discussion forum.

The PDP site became operational in May 2010, and by October approximately 60 CES members had opened an application account. The VP-PDP and the Application Administrator tracked applications from submission to the start of review by the CB. Attention was paid to the turnaround time of the application and the comments provided if reviewers perceived a need for further learning by the candidate before further consideration of the award of a CE designation. To improve interrater reliability, another CB teleconference was conducted on October 5, 2010, with strong interest among the CB members to understand the different perspectives that colleagues bring to bear on CE applications.

The CB guidelines were refined during this time to incorporate learning gained throughout the teleconferences. For example, CBs requested that consultation among application reviewers be sanctioned as part of the review process. As such, the Application Administrator will now give a CB member the name and contact information of the other reviewer of an application so they can be consulted. During this period of learning for the CE, the VP convened individual meetings with the reviewers on their respective assigned applications to help them appreciate what is expected within the applicants’ narratives, facilitated CB member learning and sharing of examples, and requested that the National Council establish a small Quality Working Group to support the VP-PDP in assuring consistency in the awarding of CE designations.

**MARKETING THE CE TO MEMBERS AND STAKEHOLDERS**

At the 2010 CES National Conference in Victoria, BC, the PDP was launched through conference presentations and training sessions on the application process. Application guides were posted on the CES website as texts, Internet video format, a downloadable document, and a PowerPoint presentation. From the moment the CE designation was launched, PDP worked closely with the CES webmaster to keep the PDP section updated for communicating with the CES members. Web postings included a list of CEs to showcase the growing numbers of
credentialed evaluators, a list of CB members with their bios, an overview of the PDP, a link to the application site, PDP updates, and links to related sites (CES PD, chapters, CUEE).

After consultation with the CB, updating the site was put on hold, as some reviewers suggested that the way the information currently appeared on their screen was acceptable and CES should wait until the evaluation to determine what changes were needed. Also, a proposed fast-track application process was new, and time was needed to learn from the pros and cons of the process. On the other hand, CB members agreed with making modification to the applicants’ site to make it easier for the applicants to provide information that would not affect what is required to qualify. After much consideration, it was decided that PDP would wait for the fast-track process to get established before revisiting the modification to the applicants’ site.

Early in the implementation, communication on the PDP to CES members included a progress report, grandparenting reminders, English and French letters to applicants notifying them of decisions, and answers to inquiries. The CES President continued to promote the PDP in communication and advocacy work. The Past President liaised with the University Consortium on the need for additional evaluation education and the critical importance of distance learning approaches.

Responding to communication requests from CES chapters and those outside CES became a daily activity for the VP-PDP. Tasks related to communication included customizing presentations and communication materials to specific audiences, sharing PowerPoint slides with chapters, and briefing CES members before chapter events and international evaluation conferences. The PDP was represented at the Thought Leaders Online Forum on Competencies and Credentialing organized by the American Evaluation Association.

By the spring of 2011, CES members connected with the PDP were being invited by their respective chapters to introduce the PDP and provide training at chapter events. Questions asked in these sessions ranged from the qualification requirements to advice on what evidence could be submitted. Members of the National Capital chapter developed a PowerPoint presentation with the participation of successful CE applicants. Input for various information sessions and experience from the initial implementation of the CE led to an updating of the Application Guide.

With the first CE approval and designation, the CES website began an up-to-date listing of the CEs’ names. The number of CEs approved and in-process provided indicators of the interest for the CE designation among the CES membership. By April 2011, 15 CES members had been awarded the CE designation, bringing the total number to 46 CEs with 5 working on further learning requirements and another 100 CES members preparing their CE applications in their Internet-based portal. PDP-related activities during the CES 2011 National Conference in Edmonton included a Credentialing Update and CE Application Information session that was attended by new CEs, who shared their application experience, and the CB members, who provided useful advice to those interested in applying for the CE designation.
TEMPORARY FAST-TRACK PROCESS

During the second face-to-face CB meeting at the Edmonton 2011 National Conference, a year from the launch of the CE designations, CB members voiced concern over the lower than expected rates of application for the CE. They suggested that the success of the professional designations program is linked to demand and supply. Those commissioning evaluations see the designation as a quality measure and use it as a factor in the choice of evaluators, both those who are employed in evaluation positions and those engaged in contract assignments. A critical mass of CEs is seen to be important and, as more CEs use the CE designation as part of their business practice, interest will spur demand for the credential in both internal and external evaluation practice in Canada. As the rate of application accelerates, especially by senior practitioners who work as evaluators in government, nonprofit, and private sectors, the demand will grow. However, seasoned evaluators weren’t applying for the designation. Experienced evaluators saw the application process as unattractive, thus limiting application submissions from a significant number of very experienced long-term CES evaluation practitioners. It was believed that as experienced senior evaluators among the CES membership apply for/ acquire the CE, future applications would be from less-seasoned CES members as the CE process was intended to be (Canadian Evaluation Society, 2011).

The CBs suggested a temporary “fast-track” process to bring in those members who CES believed were already at and well beyond the CE level of experience. A streamlined or fast-track process has been used by other professional associations in connection with new designation programs. It would also honour the long-term CES members and recognize their extensive experience and expertise in the field of evaluation. The regular CE application process is designed to be a reflective, self-assessment process, and feedback already showed that it was valued by those awarded the CE through the regular process (despite the time required to complete the application). Operationalizing the fast-tracking process proposed by the CB was discussed with the National Council using the discussion forum, and decisions were made through e-vote to go through with the process. The decision was reached to invite “experienced evaluators” from the CES membership to apply for the CE through an expedited and streamlined application process that did not impact the decision process for awarding the CE. Fast-track applications were reviewed by the CB applying the same criteria (graduate level education, 2 years of professional experience in evaluation, and 70% of CES competencies) to the decisions on awarding the CE. The fast track was meant to be a temporary process available for only one year, and application fees remained the same.

Long-term CES members were identified and invited to apply based on at least 7 years with a good CES membership record, graduate education, and a declared evaluation primary or major component of work. These criteria were used as a proxy for “experienced evaluator,” and CES recognized that it might not fully capture all those who could access this expedited application process. The invitations were not exclusionary, and other experienced CES members who wanted
to apply through the fast-tracked method were invited to write to the VP-PDP to express their interest (Canadian Evaluation Society, 2011).

Many CES members who did not receive the invitation wrote with evidence that they qualified; that letter was reviewed by the CES President, VP-PDP, Past President, and PDP Advisory Group members that constituted the PDP Committee and those members were advised if they could apply through the fast-track process. The process for a fast-tracked application was included in the letter but also posted on the CES website. The fast-tracked submission involved submitting a CV with evidence of fulfilling the educational and professional experience requirements in research, management, and/or provision of consulting services in program evaluations and demonstrating mastery in the five core competency domains within the Competencies for Canadian Evaluation Practice through management of one major evaluation and/or consulting assignment of one major evaluation in which the applicant served as the project director. It was clarified that the engagements must be substantial and comprise actual evaluations that combine several methods and demonstrate multiple lines of evidence (Canadian Evaluation Society, 2011).

Operationalizing the “fast-track” process meant that a modification of the PDP website, including bilingual application and guidelines for the review process of the fast-tracking option, was necessary. Letters to invited CES members and a notice to general membership with information on fast-tracking application process were posted on October 6, 2011. Fast-track application reminders for invited CES members set the deadline for their application as September 8, 2012, a year after the initial invitations.

The VP-PDP found that many SQEP-CES members who would qualify to apply through the fast-track process did not receive the invitation because of glitches in the membership information between the CES National database and the SQEP database. PDP sent an invitation to the SQEP CES members with deadline extended to the end of May for them to apply through the fast-track process, ensuring that they also had a year to benefit from the temporary process.

When CES members asked to be fast-tracked, the request was reviewed in consultation with the PDP Advisory Group. CE decisions resulted from the same decision process: applications were reviewed by two members of the CB in accordance with the review guidelines and a third review was undertaken if there was not a unanimous decision by the first two reviewers. The CBs could request additional information if required. Decisions were made either to award the CE based on the fast-track application received or to recommend that the applicant go through the regular CE application process with suggestions on further preparation. The temporary “fast-track” process was completed in 2012–13, bringing the total of CEs to over 200 and creating a critical mass of CEs, enabling those who commission evaluation and/or employ evaluators to list CE as a definite asset or requirement.

During the 2012 National Council meeting, discussions from the CB meeting were shared, including the recommendation that the grandparenting clause should be a permanent feature because it was put in place to benefit long-time CES
members, that the graduate-level education (certificate or degree) qualification should be enforced, and that the PLAR (Prior Learning Assessment and Recognition) be taken out of the qualifying option. The grandparenting clause became a permanent feature, but the discussion on PLAR continues.

MAINTAINING THE CE

To maintain the CE designation, members need to demonstrate ongoing learning through professional development activities, which is the fourth requirement for the CE designation. Renewal is accomplished at three year intervals with a required 40 hours of professional development or learning over that period. Each CE receives an “account” within the PDP-CE system where he/she may input courses and development activity at any time. Accounts are accessed by the Application Administrator at the 3-year mark, and the CE is contacted if the account demonstrates less than 40 hours of development activities. The account can then be updated by the CE when membership renewal takes place.

Developing the CE maintenance requirements, process, and system needs were the responsibilities of the CES National Professional Development Committee supported by the Application Administrator and the web developer. The minimum 40 hours of Continuing Education Credits (CECs) must be obtained over the three years from the date the CE designation was granted. The CECs must be in an area related to the CES evaluator competencies and must have hours of credit from activities in at least 3 of the 8 Categories of Eligible Learning Activities for CE Renewal, including conferences; workshops and institutes; learning events of less than one-half day; development and/or delivery of a workshop, seminar, or presentation; university or college course completed; preparation-research time to teach a university or college course; writing and publishing; and organizational involvement with CES. These are logged into the CE’s PDP account.

PROMOTING THE CE DESIGNATION

To promote the CE designation, CEs and the CB received lapel pins in the hope that the pins would become conversation starters, allowing every CE and CB to promote the value of the CE designation. It was hoped that the pins would be available at the 2012 Halifax conference, but they were produced in time for the 2013 Toronto conference. A Discussion Forum was set up to accommodate the new Valuing CE working group to promote the value of CEs to users and employers requiring evaluation. By May 2013, various CB and CES Executive were continually asked to speak and write about the PDP globally and CES members began to see increased references to the CE designation in requests for proposals and job descriptions. There was also increased reference to the Competencies for Canadian Evaluation Practice in evaluation capacity-building courses for professionals and for postsecondary and graduate-level education in Canada and internationally.
GOVERNANCE AND ACCOUNTABILITIES

The CE designation continues to be administered through the PDP under the management of the VP-PDP. Dimensions of the Professional Designations Program are provided in the CE Guidelines and CB Terms of Reference and Guidelines. The VP-PDP, as a member of CES Executive and National Council, ensures delivery of the CE is well integrated with other CES services through collaboration with existing CES Standing Committees and Administrative support (Professional Designations Project Core Committee, 2009). The VP-PDP continues to be responsible for the implementation, monitoring, evaluation, and reporting on this program. The National Council has overall accountability for both adherence to the intent and requirements of this program and reporting on same to CES Members at large.

MODIFICATIONS AND PERIODIC REVIEW OF PDP

The PDP website has been functioning well, with minor adjustments based on user inputs with respect to the application submission, the reviews, and the administrative work. However, even in the short time that the website was being developed, the speed of change in technology forced changes to it to accommodate users of different programs to connect to the site.

The CE application process will no doubt be refined in the future in response to the needs of the members. The PDP website has already been changed from the initial launch to accommodate the “fast-track” application and review system that was set in place for a limited time. It has also been expanded to include the CE maintenance site. CES has since decided to retain web support service to assist the Application Administrators with technical issues through a secretariat service provider.

The PDP proposal required periodic review, updating, and validation of designation qualifications, CES Ethics, Standards & Competencies, as evaluation is not static and the fundamental underpinnings of this program require review and renewal at regular intervals. The CE policy approved in May 2009 states that this activity is to be undertaken in concert with the Membership and Administrations committees, using the existing mechanism for representation on the Joint Standards Committee (Buchanan, 2015; Maicher & Frank, 2015).

Questions regarding the qualifications continue to come in. For example, in the winter of 2011, the VP received inquiries about whether certifications from other professional organizations are equivalent to certificates from colleges and/or universities and whether Board exams after an undergraduate degree or diploma in general constitute a postgraduate program. In such cases, members argued that the exams are merely the final step of that undergraduate degree (administered by the professional body rather than the school) and, for some internationally trained applicants, it is the exam that must be passed to be recognized.

The Application Administrator has been monitoring and maintaining time logs to see how much time is invested in each application so that the turnaround
time for decision and the cost associated with the PDP can remain neutral (Professional Designations Project Core Committee, 2009). Feedback from both the applicants and the CB has been carefully monitored with the technical support of the web developer. For example, CB reviewer pages have been refined as CB members identified typos. By May 2012, the VP-PDP and Application Administrator investigated areas that needed modification to improve the usability for applicants, reviewers, and administrators. Where consistent problems occurred, clearer and more concise instructions and messages were added to the system. Work on improving how the system is recording and producing statistics for the program continues.

CONCLUSION

Every effort was made throughout the launch and operationalization of the PDP to ensure that program processes were well articulated and documented, as a volunteer-based organization such as CES operating with a small number of paid staff (in some cases none) would find it difficult to maintain the consistency of its operation. The PDP administration involves a paid Application Administrator managing the application and review process using an Internet-based PDP site that was customized for CES use. The detailed documentation helped CES, which does not have a physical office and dedicated paid staff, to focus on the work of the PDP. Based on CES commitment to inclusiveness, the PDP was established to be accessible from anywhere in Canada. Despite the PDP process being overwhelmed with the fast-tracked applications and the web support being very limited, there have been few technical issues, and plans are already in development to further refine the tools for PDP.

With the right technology, small organizations such as CES can operate a fairly complicated process involving extensive interaction with its membership. The collaborative nature of the PDP planning, implementation, and monitoring processes necessitated vast amounts of information to be articulated and deciphered, with lessons learned and next steps to be determined developmentally.

In the end, the well-documented process helped CES share its experience with the larger community of evaluators. This special issue of CJPE is one example—as are sharing through journals, conferences, and international efforts such as EvalPartners—of collaboratively exploring with a wider audience whether CE is supporting professionalization efforts by defining, recognizing, and promoting the practice of ethical, high quality, and competent evaluation in Canada and beyond.

REFERENCES


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