

Debating Professional Designations for Evaluators

Reflections on the Canadian Process¹

J. Bradley Cousins²

University of Ottawa, Ottawa, ON

Jim Cullen

Thomas More Institute, Montréal, PQ

Sumbal Malik

Peel Board of Education, Mississauga, ON

Brigitte Maicher

Net Results & Associates, Fredericton, NB

ABSTRACT: This paper provides a reflective account of a consultation process on professional designations for evaluators initiated and coordinated by the Canadian Evaluation Society (CES). Described are (1) the forces leading CES to generate discussion and debate about professional designations for Canadian evaluators, (2) the process of developing and implementing a request for proposals for a tentative action plan that would serve as a basis for debate, and (3) the subsequent development and implementation of a pan-Canadian, tripartite consultation process that involved CES members, CES Chapter organizations, and partners of the Society (including evaluation users). The paper concludes with reflections on the process and a summation of lessons learned.

KEYWORDS: *evaluator professional designations; professionalization; consultation; credentialing*

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² Parts of this paper have been adapted from prior reports, specifically CES National Council (2007) and Cousins, Malik and Maicher (2007). Cousins has been an ex-officio member of CES National Council by virtue of his role as editor of the *Canadian Journal of Program Evaluation* since 2002. He has been associated with Member Services Committee since his term began. Cullen was a member of CES National Council from 2000 to 2007. He served as chair of Member Services Committee from 2003 to 2007. Malik was a student at University of Ottawa graduating with a master's degree in 2007. Maicher has been a member of CES National Council and associated with Member Services Committee since 2002.

The Canadian Evaluation Society (CES) embarked in the period 2005-07 to seriously explore the promises and prospects of developing a national system of professional designations for Canadian evaluators. This paper is a descriptive account of that process, concluding with some reflections and thoughts about lessons learned. In the global history of evaluation, the consultation process adopted and implemented by CES on this topic is arguably the most thorough and comprehensive treatment the field has seen. Our expressed purpose is to share this experience in the interest of assisting other professional evaluation societies or organizations that may be considering similar processes. In this paper, we neither support nor oppose the proposition that professional designations for evaluators *should* be established. Rather, our goal is to describe and reflect on the consultation process by way of providing fodder to those in other jurisdictions who may be considering mounting similar processes.

We begin with a brief overview of background considerations and the impetus for consultation. We then describe the initial stage of commissioning a tentative plan for action followed by CES National Council's response to the received action plan and subsequent pan-Canadian consultation activities. We conclude with some reflections on the process.

Rationale for Discussion and Debate

Evaluation in Canada, similar to most jurisdictions around the globe, is heavily driven by government (Aucoin, 2005; Cousins & Aubry, 2006; Segsworth, 2005). About sixty percent of the members of CES—whose rolls currently number somewhere in the neighbourhood of 1,700—are organizationally located in government, mostly at the federal

level, but with significant representation from provincial and municipal counterparts. Most of the remaining CES members work in the voluntary/not-for-profit sector, with persons employed in the private sector—predominantly in consulting firms—next on the list. Those employed by colleges and universities are perhaps the final identifiable group on the CES roster, but they represent only less than five percent of the overall membership. While this demographic breakdown is consistent with most evaluation societies around the globe, it stands in marked contrast to that of the American Evaluation Association (AEA), most notably with respect to representation from the academic sector. As of April 2008, thirty percent of AEA membership was located in the academic sector (Manning, 2008).

In the fall and winter of 2005-06, CES National Council began to consider seriously the prospects of developing and implementing a system of professional designations for evaluators. The issue had been debated in the 1990s. During that period, CES commissioned a fact-finding paper on professional designations and certification in other professional organizations by Long and Kischuck (1997). Afterward, Council decided not to move ahead with professional designations. Yet recent developments in Canada brought the issue back onto the radar screen.

CES observed among its membership, and members of the Canadian evaluation community, increasing interest and attention to issues of evaluator identity and the potential role that a system of professional designations might play in improving the quality of evaluation work. Such interest was partly reflected in a comprehensive pan-Canadian survey conducted by leading Canadian evaluation practitioners (Borys, Gauthier, Kishchuk & Roy, 2005; Gauthier, Borys, Kishchuk & Roy, 2006). Results revealed significant interest in

“professionalization” and “certification” among contemporary Canadian evaluation practitioners, who saw professional designation as a way to enhance evaluator credibility and believed that it would lead to improved quality of evaluation. CES also observed that such interest extended well beyond the field’s professional rolls. As a basis for consideration in preparation for evaluation policy renewal, Centre of Excellence for Evaluation (CEE) of the Treasury Board of Canada Secretariat (TBS) commissioned a set of inquiry papers on evaluation. Some of these papers raised serious concerns about the relevance of evaluation in the federal decision process (Aucoin, 2005; Breem & Associates, 2005). Breem and Associates (2005) also showed that senior management held serious reservations about the quality and rigor of evaluation. Such concerns, along with limits on the supply of qualified evaluation personnel due to retirement patterns and increasing demand, prompted CEE to examine more closely the concept of professionalization of evaluation and training and educational opportunities for evaluators (Cousins & Aubry, 2006; Gussman, 2005). It was even suggested that CEE “is in the process of actively considering how best to make use of credentialing in its attempt to raise the professionalism of evaluators employed by the federal government.” (Gauthier, Halpern, et al., 2006, p. 4).

Given these developments, CES National Council resolved to initiate a fact-finding inquiry in order to lay the groundwork for intensive debate on the matter within the membership. Only after consultation with the CES membership would a decision be made as to whether a system for professional designation should be developed and installed in Canada and, if so, what that system might look like. Council charged its Member Services Committee with responsibility for this initiative. We now turn to a summary of the consultation initiative, including the

development of a tentative action plan for discussion, National Council’s response to this action plan, and the subsequent pan-Canadian consultation.

Tentative Action Plan

CES National Council resolved to fund the development of a tentative action plan for professional designation that would provide a concrete platform for discussion and debate. The Member Services Committee undertook its own research on the matter and cobbled together a draft request for proposals (RFP), which was subsequently fine-tuned on the basis of Council Executive Committee input. In the RFP, Council specifically asked for an action plan for the development and implementation of a professional “credentialing” system. By credentialing system was meant a mechanism or means of determining whether an applicant’s educational or practical experiences and achievements warrant the award of a professional credential (Altschuld, 2005). On May 19, 2006, the CES National Council issued the RFP titled “Fact Finding Regarding Evaluator Credentialing.”

Council was very fortunate to have received competitive interest and proposals in response to the RFP, and ultimately the contract was awarded to a sizable consortium of prominent and leading members of the Canadian evaluation community (henceforth referred to as the Consortium) headed by Gerald Halpern. The Consortium’s proposal included a clear indication that the bulk of the work would be contributed *pro bono* and that the resources designated to the project would be deployed to research assistants and to foster communication among Consortium members. Council was extremely grateful for the generosity and dedication shown by the Consortium members in the interests of CES and the Canadian evaluation community.

In negotiating the contract, the Consortium advocated fact finding for a full-blown system of professional designations, including exam-based certification, as opposed to Council's expressed desire to focus on a system of education- and experience-based credentialing. Ultimately, a compromise was reached, and it was jointly agreed that the focus for the fact-finding document would be on credentialing, but that credentialing would be placed within a larger scheme of professional designation including professional certification of evaluators.

The Consortium clearly contributed above and beyond the parameters of the signed contract in delivering a three part collection of products comprised of (1) an action plan for professional standards for evaluators (Gauthier et al., 2006) and two support documents: (2) an extensive and comprehensive literature review (Huse & McDavid, 2006) and (3) a research report on a qualitative survey of fifteen professional organizations and societies based on document (Web site) analysis and key informant interviews (Halpern & Long, 2006).³

The centerpiece of the tripartite submission was the Action Plan, which called for the development and installation of a three-tier system of professional designation consisting of formalized designation of:

1. CES Member, including subscription to CES objectives, evaluation standards, and ethical guidelines (the equivalent of a paid association member)
2. Credentialed Evaluator (CE) or entry-level designation awarded to members having applied for the designation after having

successfully completed an accredited program or its equivalent

3. Certified Professional Evaluator (CPE), a professional designation awarded to members who meet all of the prescribed requirements (letters of support in a transitional period; successful completion of standardized examinations to test core knowledge competencies in the longer term)

For both CE and CPE designations, the Consortium recommended that respective oversight boards be established. In the case of CE, an *Accreditation Board* (CES-ABd) would assume responsibility for accrediting programs of study and equivalencies. In the case of CPE, a *Board of Examiners* (CES-BdE) would manage the CPE designation process. The report recommended immediate action and the establishment of interim designation procedures such that a grandparenting system would not be required; existing CES members could apply for and achieve designations for which they are eligible. The Consortium recommended that the CES establish a publicly accessible directory of members with their levels of professional designation and that CES should advocate on behalf of the value and benefits of professional designation and the unique competencies of those of its members who have been awarded a professional designation.

CES National Council Response

In February 2007, CES National Council met to consider the submissions on professional designation and to develop a plan for consulting the CES membership and members of the Canadian evaluation community at large. On reflection, Council was not fully persuaded by the Consortium documents that the option of a full-blown system of professional certification was the best path to follow at the time. It therefore

³ Each of these documents is available on the CES website (www.evaluationcanada.ca). In the end, not all Consortium members agreed fully with the final product. Specifically, one Consortium member filed a "minority report" (Long, 2007) with CES National Council, also available on the CES Web site. National Council took this report under advisement.

developed a response to the Consortium's action plan that offered the "considered opinion" that a reasonable first step would be to develop a system of professional credentialing based on educational and/or practical experience in evaluation. In essence, Council provided tentative support for an intermediate system of professional designation that left open the prospect of developing a system of exam-based certification in due time. It then developed a consultation plan for the CES membership and the evaluation community at large, including partner organizations⁴ and employers.

Multi-Stream Consultation

In March 2007, CES launched a consultative call for views and opinions that provided for four streams of input:

- EDÉ-L (Evaluation Dialogue—Dialogue Évaluation), a Web-based, public discussion forum sponsored by CES (essentially a Canadian version of EVAL-TALK)
- E-mail submissions to the CES Membership Services Committee
- Chapter briefs from local CES chapter⁵ consultations
- Partner briefs from a concerted effort to reach out to key partner organizations in the Canadian evaluation community

The request for consultative input pointed to support documentation posted on the

⁴ We use the term "partner organization" in a loose, informal sense to imply organizations with common interests in evaluation in Canada.

⁵ CES is governed by a chapter structure. Chapters exist in each of ten Canadian provinces, plus one representing the Northwest Territories (smallest) and another representing the National Capital region in Ottawa (largest). Each chapter appoints one voting member to National Council.

Web, including the Consortium action plan and National Council's response, and took the following form:

Should CES establish a system of professional designations for evaluators? Why/why not?

If so, what should it look like?

Multi-tier?

Certification?

Credentialing?

Other?

Issues that you may wish to take into consideration may include at least the following:

- benefits;
- costs (fiscal, human resources);
- feasibility;
- utility;
- regional sensitivities;
- availability/access to educational opportunity;
- employer demands;
- agreement about essential evaluator competencies;
- implications for local CES Chapter(s);
- implications for evaluation in Canada;
- and implications for CES globally.

The call for consultative input was sent to CES members via the CES e-mail list. Chapter representatives on Council each arranged chapter-level meetings to discuss the topic and to consider developing a chapter brief. Letters were also issued via e-mail to partner agencies and organizations in government (federal and provincial), voluntary sector, private sector firms, universities, and related professional societies.

The call for consultative input explicitly noted that a town hall meeting on the subject

of professional designation consultation was planned for June 2007 as part of the CES national conference held in Winnipeg, MB. The deadline for submission of consultative input was therefore mid-May 2007, at which point an integration team (Cousins, Malik, and Maicher) began its work of integrating and synthesizing information provided across the four streams.

The integration team developed and implemented a plan to systematically synthesise the input. The focus for the report was a description of views and opinions expressed by CES members, partner agencies, and organizations. No interpretive analyses were provided.

On the question of whether CES should proceed with establishing a system of professional designation, input was highly mixed. Partner briefs and some chapter reports tended to favour an affirmative response, with most chapters favouring an education- and experience-based credentialing system

The integration team provided a balanced report on the input received. The analyses emerged into four main categories or themes, as follows:

- *Professional designation options:* Thoughts about what professional designations might look like and arguments either for or against specific approaches. Comments and concerns generated were grouped into subthemes: professional designations in general, exam-based certification, the concept of voluntary certification, educational and experience-based credentialing, and other less frequently addressed issues. The section ended with a description of initiatives currently under development with TBS that have significant implications for CES.
- *Rationale:* Reasons for or against establishing a system of professional designations. Issues raised were demand

by evaluators for professional recognition and identity, the multidisciplinary nature of evaluation as a domain of professional practice, roles for the professional society, environmental forces at play, and the needs of employers and purchasers of evaluation services, among others.

- *Implementation strategies and challenges:* Suggestions, comments, and concerns about the business of developing and establishing a system of professional designation. Discussed here were implementation strategies and challenges, fiscal and human resource costs, evaluator competencies, access to training and development opportunities, and other issues.
- *Consequences:* Reflections on the probable effects of establishing a system of professional designation, or not. The subthemes that emerged were improvement in evaluation quality, enhanced validation of evaluation as a profession, constrained diversity in the field, implications for recruitment and renewal, implications for the professional society, and legal issues.

Regardless of the issue or the subtheme under discussion, it is fair to say that significant diversity in opinion existed among the contributors to the consultation process. To that end, the consultation has succeeded in raising, in undeniably thorough fashion, issues of high relevance to a potential decision to embrace the establishment of a system of professional designations as an overt objective for CES.

As is the way with many if not most professional societies, each year CES National Council takes advantage of the Society's annual conference as a venue for a face-to-face Council meeting. At the Winnipeg meeting in June 2007, the integration team shared the results of the findings of its report with Council and requested permission to

print the forty-two page report (Cousins, Malik & Maicher, 2007) for distribution at the impending town hall meeting (to be held two days hence during the conference). Clearly, delegates coming to the session would not have had time to read and digest the document, yet since the report was highly structured and contained a wealth of verbatim quotations from those providing input, it was reasonable to expect that delegates could scan the report as a resource during the town hall meeting.

The town hall meeting was subtitled “Should CES Establish a System of Professional Designations? If So, What Would It Look Like?” The session was audio-recorded and simultaneous French-language translation services were provided. It spanned two concurrent time slots on the conference agenda (three hours) and was attended by upward of 100 delegates for at least part of the meeting, the majority being present for the entire session.⁶ Most members of CES National Council were in attendance as well.

Although initial brief presentations were made by the Consortium, CES National Council, and the integration team, the bulk of the session was devoted to input from the floor. Microphones were available to delegates and panel members, and members were made aware that the session was being audio-recorded for the benefit of those not able to attend. In addition to the audio recordings, three volunteers took field notes during the session. The session lasted for the entire three-hour time slot, which included a short intermission.

As was the case with the multistream consultation phase, the town hall meeting resulted in the generation of a wide diversity of opinions and views, yet it was conducted in a notably professional and respectful manner. Several members commented on prior input

generated either by the multistream process or in the meeting itself.

The session recorders collaboratively compiled a summary document that included a cross-check of field notes for the purposes of verification (Malik, Maicher & Porteous, 2007). The summary included input from about twenty participants, as well as interactive and summary statements from members of the panel. The summary document and some audio recordings were posted on the CES Web site.

The content of the discourse reflected many of the concerns previously expressed in the multistream process (Malik et al., 2007). That is, views and opinions were voiced about professional designations options, the rationale for professional designation, implementation strategies and challenges, and the potential consequences of professional designations. To follow is a sample of issues that were raised. Notable are several points of disagreement:

- Some participants suggested cost of failure should be weighed; what are the implications for the professional society? Yet others viewed this as an opportunity for global leadership for CES since professionalization is being considered elsewhere internationally. Fear of failure should not be a concern.
- It was suggested that the federal government appears to be moving ahead with a system of professional designation for evaluation. Some participants viewed that to be ample motivation for the professional society to move quickly while others did not see this as a suitable rationale. What was the problem to be solved?
- Concerns about the supply of qualified evaluators were raised, specifically that supply cannot meet demand at present within government. Yet, others feared that a system of professional designations

⁶ The CES annual conference attracted slightly over 250 registrants (Proactive Information Services, 2007).

would be unattractive to junior evaluators and might act as a barrier to entry to the field of practice.

- While some raised concerns about quality control and the need for professional and graduate training, others suggested that in other professional societies, certification does not really have an impact on practice; it may turn out to be just a “cash cow” for the professional society.
- It was observed that graduate degree programs in evaluation are on the decline in the U.S. and that short courses and other forms of preservice and inservice professional development are meeting training demands. In Canada, on the other hand, it has been documented that the need for advanced-level training has been expressed by practicing evaluators.

“Too many unanswered questions,” “threat to diversity in the field,” and “the state of the art of evaluator competencies” were other issues that were addressed, in most cases with a mix of opinions.

Reflections

In this paper we describe a significant consultation processes on the prospects and implications of establishing a system of professional designations for evaluators. The consultation was led by CES over the period 2005-07. We believe it to be the most comprehensive process of its kind undertaken to date. The results of the consultation provided a richly detailed portrayal of the issues concerning evaluator professional designation. Clearly no consensus was reached, yet the results provided CES with an elaborate basis on which to deliberate and decide its future course of action on this front. While the results of the consultation are likely to be of high interest to those in jurisdictions beyond Canada (see associated documents at www.evaluationcanada.ca), their

controversial nature underscores the importance of local and regional contextual considerations.

Evaluation associations or organizations considering the possibility of establishing such a system would be wise to implement their own consultation process. To that end, our intention in this paper has been to provide some insights into the structure and dynamics of the Canadian consultation process. We now conclude with some thoughts and reflections about this process with an eye to identifying lessons learned. It is our intention to provide a basis for consideration by those in other jurisdictions who may be considering mounting similar consultation processes.

Volunteerism

We are struck by the considerable work and demands involved in managing a process of this sort. CES provided considerable resources to support the process, including a modest contract for the development of an action plan, support for graduate student research assistance, as well as resources for the town hall meeting. Yet, what really carried the day, without question, was an enormous sense of volunteerism on all sides. The Consortium, in producing its three-part submission, exceeded expectations by far and away. The vast amount of that work was done pro bono by Consortium members. Member Services Committee, too, contributed greatly to this initiative, perhaps much more than it had imagined would be required at the outset, and perhaps also to the detriment of other responsibilities needing to be temporarily placed on hold. Without this spirit of volunteerism, the costs of such an undertaking would have been formidable. A significant investment in either financial planning/budgeting or in recruiting volunteer support is essential in our view, since it will serve to avoid overburdening or overtaxing those charged with process responsibilities.

Legwork

Early in the process, CES Council had done a great deal of background work on the prospects of professional designation, the various options for consideration, the experiences of other professional societies (e.g., Long & Kishchuk, 1997) including those of the AEA (e.g., Altschuld, 1999; Bickman, 1999; Smith, 1999, 2003; Worthen, 2003). This advanced legwork led to the development of an identified focus on credentialing at the outset. Yet the Consortium to whom the contract was awarded argued for a more far-reaching, full-blown target as the focus for a proposed action plan. This difference of perspective led to significant tensions between the Consortium and CES Member Services Committee in the early going. Ultimately, a middle ground was established and the project continued. In hindsight, these were healthy tensions, because they pushed thinking on both sides and ultimately a broader range of explicit options was the result, which was to the benefit of the membership and the ensuing consultation process. It is essential, we believe, to commit to significant advanced legwork in order to develop a solid understanding of the issues and information needs. Such a basis of understanding provides a foundation from which unanticipated challenges can be considered, deliberated, and ultimately addressed.

Transparency

Early in the process, knowing the gravity of the issues at hand, CES made a commitment to transparency. This, we believe, is a crucial principle, particularly since deliberations about professional designation are so controversial and value-laden. CES held as a goal genuinely surfacing all of the issues and putting them on the table for all to see. The agenda was to overtly consider options in concrete terms by

way of engendering national debate and discussion. The result was an enormous diversity of opinion with positions being stated with both clarity and passion. We are extremely impressed by the level of sophistication of views and opinions received and in particular the passion with which they were articulated, many presented as verbatim quotations in the integration report (Cousins et al., 2007). CES's Web services proved to be invaluable to ensuring transparency. Not only did the discussion forum EDÉ-L serve as a repository of consultative input and exchange, but the Web site offered a home for all of the relevant background documents and products of the consultative exercise.

Despite CES's overt commitment to transparency and public consultation, an important caveat is that not everyone participating in the exercise was willing or interested to "go public." We had some requests for permission to post e-mails on EDÉ-L either turned back or not acknowledged and one request to remove input from the summary of the town hall meeting (Malik et al. 2007) despite an overt statement by the chair that the session was being recorded for the purpose of feeding back to the membership and others. Further, we did not receive replies from several town hall participants to our invitation to post their audio-recorded input on the Web. All this is to say that it is prudent to be highly vigilant and respectful about informed consent and participants' right to refusal.

Representativeness and Utility

We understood from the outset that in order to be successful in the endeavour, outcomes needed to be responsive to all key stakeholders. We aimed to reflect the positions of users (demand side) as well as providers (supply side) of evaluation. In this sense, the diverse views presented were carefully considered with the intent to

integrate them as much as possible into future decision making. We believed that a step-by-step consultative approach would allow for such integration: As initial steps were implemented and reviewed, ongoing process development could evolve, and key partners and collaborators would be engaged to ensure continued input into the process. In particular, those with passionate voices would be used as informants throughout the progression of the consultation. Even within broad categories of stakeholders, such as users and evaluation producers, there exists considerable variation in opinion. It is important for the purposes of consultation to understand the nature and extent of this variation and to commit to seeking out a broad range of perspectives.

Reach

Despite CES's efforts to reach partner organizations with an interest or potential interest in the prospects of professional designation, input from this stream was highly limited. Part of the problem was the undeniably short timeline for consultation, which was even further limited by the need to compile an agreed list of intended partner recipients. In retrospect, it would have been prudent to have developed this list well in advance such that the consultation within the partner stream would be fully concurrent with the other parallel streams. Initially, noticeably absent from the list of partners responding was Treasury Board of Canada, Secretariat (TBS). However, the integration team was able to successfully and proactively meet with TBS personnel and represent their input in the report. In doing so, it became apparent that the prospect of TBS preparing a written brief representing the federal government was a nontrivial and daunting challenge, considering competing urgent internal demands. We would suggest that requests for written briefs from partner organizations

might be somewhat unrealistic and that a preferred mode might take the form of telephone or face-to-face consultative meetings with high-priority stakeholder groups. While there would be obvious resource implications of such a strategy, the potential pay off likely would be worth the effort. Our experience with TBS led to a coherent summary of its important input for all to see in the integration report (Cousins et al., 2007).

Format

In our view, without question, the town hall meeting was an enormous success in providing a forum for serious deliberation, discussion, and debate. The meeting was well-attended, participants were well-informed about the issues and most notably, dialogue and exchange was highly professional and respectful, despite the wide range of opinion and the obvious passion with which such views were held. Those first to speak were at polar opposites in terms of their perspective and opinions, and this set the tone for the ensuing exchange. A real virtue of a meeting of this sort is that it provides participants with the opportunity to comment on prior input and to engage in dialogue. While EDE-L provided similar virtual opportunities in the earlier phase of the consultation, it was important for Council to hear the input and the tenor of the conversation first hand.

This brings to a conclusion our description of the process and reflections on its virtues and limitations. In many ways, this is an exciting and potentially pivotal juncture in the history of evaluation. Our objective has been to provide some descriptive insights into the nature of what we believe has been a comprehensive and effective consultation process on the prospects of professional designations for evaluators, perhaps the most significant to date. If the process described here can help to inform future discussion and

discourse in this vein, then our ultimate goal will have been achieved.

Epilogue

In October 2007, President Frankie Jordan of the Canadian Evaluation Society advised the membership that National Council had formally decided to proceed with the development and implementation of a system of professional designations for evaluators, and that work toward that end has begun.

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