2009-2010 CES-NCC Member Need Assessment

Final Report

Prepared for the

National Capital Chapter of the Canadian Evaluation Society

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EXECUTIVE SUMMARY

The National Capital Chapter of the Canadian Evaluation Society (CES-NCC) Board of Directors requires a better understanding of the professional needs of the members of the Chapter in order to develop its multi-year service strategy. Although the CES has traditionally focussed on the training component of professional needs, CES-NCC wants to explore other aspects such as networking, mentoring, communications, advocacy, etc.

The objectives of the project were:

- to provide an understanding of the professional needs of the members of the CES-NCC; and,
- to support the development of the CES-NCC multi-year service strategy.

The study methodology included a Web-based survey of 285 CES-NCC members (out of 633) between August 18 and September 24, 2010 (response rate of 48%; precision of ±4.3 percentage points); and, three 2-hour focus groups with non-management federal evaluators, federal evaluation managers, and non-federal evaluators.

KEY RESULTS

Who are CES-NCC members?

- *Federal*: 65% federal; 26% private sector; 6% not-for-profit.
- *Producers*: 85% are producers of evaluation: 52% for their own organization and 33% for other organizations.
- *Variable experience*: 32% have 3 years of experience in evaluation or less; 23%, 4 to 7 years; 43%, 8 or more.

- **Involved**: 69% devote at least half of their time to evaluation; 29%, less than half.
- **Educated**: 68% have a Master's degree; 12%, a doctorate.

Reaction to the current CES-NCC offering?

- **Mildly satisfied**: 68 points overall.
- **But loyal**: 89 points on likelihood to renew membership.
- **2009 learning event**: particularly well received, interactive, dynamic, well run.
- **Networking**: current events not conducive to networking.
- **Web site**: has very low visibility; confusion with the national site.

Needs regarding training

- **Professional introduction training** is sought for new evaluators.
- **Advanced training** relevant to established evaluators is the most desired service.
- **Preferred topics**: cost-effectiveness and cost-benefit analyses; assessing data reliability, validity and trustworthiness; data analysis and interpretation; research design; communicating evaluation results.
- **Training format**: face-to-face, off work site; single-day for managers; multi-day for others.

Needs regarding networking

- **Thirst**: there is considerable thirst for networking in the form of communities of practice.
- **Lunch & Learn**: very positive feedback.

Expectations regarding advocacy

- **Priority**: important CES responsibility for many.
- **Meaning**: improving the profile of evaluation, publicly demonstrating evaluation value, promoting quality professional values and behaviour, taking positions in public debates.
- **Capacity**: recognized as a difficult endeavour, particularly without a permanent secretariat.

RECOMMENDATIONS

Training

- Develop a high-level **curriculum** for new evaluators; support offerings.
- Identify **existing training offerings**; coach trainers to adapt to the evaluation context.

Networking

- Develop a strategy to implement **Niche Interest Groups**; e.g., seed events, lists of individuals sharing interests, training on network management, training on Internet-based tools to support networking, making venues available at low or no cost for meetings, etc.
- Revise the format of **breakfast sessions** to foster networking.
- Consider building a **Web service** to list evaluators.

Communications

- Define **expectations for the Web site** and build a relevant development strategy.
- **Monthly** e-mail **communication** from its president to members.
- **Brand** communications from CES-NCC as CES-NCC.

Pricing

- Continue to offer **events free of charge** for members.

Advocacy

- Take an active role in the advocacy efforts of **CES National**.

RÉSUMÉ POUR LA DIRECTION

Le Conseil d'administration de la Section de la Capitale nationale de la Société canadienne d'évaluation (SCÉ-SCP) veut mieux comprendre les besoins professionnels des membres de la Section de façon à pouvoir développer sa stratégie d'offre de services sur une période de plusieurs années. Bien que la SCÉ ait traditionnellement mis le cap sur le volet Formation dans le cadre des besoins professionnels, la SCÉ-SCP veut explorer d'autres aspects comme le réseautage, le mentorat, les communications, la promotion et la défense des droits, etc.

Les objectifs du projet étaient :

- de fournir une lecture des besoins professionnels des membres de la SCÉ-SCP; et
- de soutenir le développement de la stratégie d'offre de services de la SCÉ-SCP sur une période de plusieurs années.

La méthodologie de l'étude a inclus un sondage effectué par Internet auprès de 285 membres de la SCÉ-SCP (sur un total possible de 633) au cours de la période s'échelonnant du 18 août au 24 septembre 2010 (taux de réponse de 48 % obtenu avec un taux de précision de ± 4,3 %); et trois séances de deux heures avec des groupes de discussions formés d'évaluateurs non cadres de la fonction publique fédérale, des évaluateurs-cadres de la fonction publique et des évaluateurs extérieurs à la fonction publique.

LES PRINCIPAUX RÉSULTATS

Les membres de la SCÉ-SCP

- *Dans le secteur fédéral* : 65 % sont au gouvernement, 26 % sont au secteur privé et 6 % sont dans des OSBL.
- *La production d'évaluations* : 85 % produisent des évaluations, dont 52 % pour leur propre organisation et 33 % pour d'autres organisations.
- *La variété de l'expérience* : 32 % ont trois ans d'expérience ou moins, 23 % ont de quatre à sept ans d'expérience et 43 % ont plus de huit ans d'expérience.
- *Participation* : 69 % consacrent au moins la moitié de leur temps de travail à l'évaluation et 29 % y consacrent moins de la moitié de leur temps.
- *Éducation* : 68 % détiennent une maîtrise et 12 % détiennent un doctorat.

Réactions à l'offre de services actuelle de la SCÉ-SCP

- *Satisfaction tiède* : dans l'ensemble, 68 % des membres sont satisfaits.
- *Mais loyaux* : 89 % des membres renouvelleront probablement leur adhésion.
- *L'événement d'apprentissage 2009* a été particulièrement bien reçu; il a été jugé dynamique interactif et bien organisé.
- *Réseautage* : les événements de réseautage actuels ne favorisent pas le réseautage.
- *Le site Web* actuel a très peu de visibilité et le site national quant à lui est confus.

Besoins en formation

- *Formation d'introduction* : les nouveaux évaluateurs sont à la recherche d'une formation d'introduction à la profession.
- *Formation avancée* : le service le plus souhaité serait une formation avancée et pertinente s'adressant aux évaluateurs établis.
- Les *sujets de prédilection* des membres sont : les analyses sur le rapport coût-efficacité et la rentabilité; l'évaluation de la fiabilité, de la validité et de la véracité des données; l'analyse et l'interprétation des données; les modèles de recherche; et la communication des résultats d'évaluation.
- *Formules de formation* : favoriser les face-à-face, tenir les formations à l'extérieur du milieu de travail sur une seule journée pour les cadres et sur plusieurs journées pour les non-cadres.

Besoins concernant le réseautage

- Une **grande soif** de réseautage basé sur la communauté de pratique est présente chez les membres.
- Les **conférences midi** (Lunch-and-Learn) sont perçues très positivement.

Attentes à l'égard de la promotion et de la défense des droits

- **Priorité** : pour plusieurs des membres, il s'agit d'un dossier prioritaire et d'une responsabilité importante de la SCÉ.
- **Signification** : elle agit pour l'amélioration de l'image de l'évaluation, la démonstration publique de la valeur de l'évaluation, la promotion de valeurs et d'attitudes professionnelles de qualité, la prise de position dans des débats d'intérêt public.
- **Faisabilité** : on reconnaît qu'il s'agit d'une tentative difficile à réaliser, surtout sans un secrétariat permanent.

RECOMMANDATIONS

Formation

- Développer un **curriculum** de haut niveau pour les nouveaux évaluateurs, soutenir et appuyer les suggestions.
- Identifier l'**offre de formation actuelle**; entraîner les formateurs à s'adapter au contexte de l'évaluation.

Réseautage

- Développer une stratégie de mise en place de **groupes d'intérêts nichés**; par ex. : l'amorce d'événements, la création de listes de personnes partageant des intérêts communs, la formation sur l'administration en réseaux, la formation sur les outils Internet favorisant le réseautage, la recherche de la disponibilité de locaux de rencontres gratuitement ou à bas prix, etc.
- Revoir la formule des **petits-déjeuners-causeries** pour favoriser le réseautage.
- Considérer la création d'un répertoire des évaluateurs **en ligne**.

Communications

- Définir les **attentes** à l'endroit du **site Web** et mettre sur pied une stratégie de développement pertinente.
- La présidence devrait créer un **bulletin mensuel** de communication par courriel destiné aux membres.

- Utiliser l'***image de marque*** de la SCÉ-SCP dans toutes les communications de la SCÉ-SCP.

Coûts

- Continuer à offrir des événements ***gratuitement*** aux membres.

Promotion et défense des droits

- Jouer un rôle actif à l'endroit des efforts déployés par l'***organisation nationale de la SCÉ*** en matière de promotion et de défense des droits.

Chapter 1

INTRODUCTION

The National Capital Chapter of the Canadian Evaluation Society (CES-NCC) Board of Directors requires a better understanding of the professional needs of the members of the Chapter in order to develop its multi-year service strategy. Currently, it bases its decisions on its intuitive and anecdotal knowledge of the evaluation environment, and on a survey of members conducted in 2002.

Although the CES has traditionally focussed on the training component of professional needs, CES-NCC wants to explore other aspects such as networking, mentoring, communications, advocacy, etc.

Circum *Network Inc.* was tasked by the CES-NCC Board to collect information on member professional needs. The first step in the study was to develop, to implement and to report on a survey of members. This report presents the methodology used in the study (chapter 2), key findings (chapter 3) and recommendations from this assignment (chapter 4). Appendices contain the survey questionnaire, detailed data tables and the focus group guide.

Chapter 2

METHODOLOGY

This study is based on a survey of members and on a series of focus groups derived from the sample of survey participants. The survey was conducted on the Web, based on a list of members of the CES-NCC. This chapter discusses the study methodology, and more specifically survey questionnaire design and pretest, sampling strategy, data collection operations, data weighting, data processing, and data analysis, as well as the steps involved in the conduct of the focus groups.

2.1   Survey

Questionnaire Design and Pretest

The questionnaire was developed by **Circum** *Network Inc.* based on the concerns of CES-NCC, a marketing research framework and existing questionnaires. Questions were built or re-used to inform the following issues:

- Who are CES-NCC members?
- How central is evaluation for CES-NCC members?

- How involved are CES-NCC members in chapter activities?
- What is CES-NCC direct competition?
- Which products or services do CES-NCC members value most?
- What are the best service delivery mechanisms for CES-NCC members?
- How do CES-NCC members want to be reached?
- How much of an issue is the pricing of activities?

Seven iterations of the draft questionnaire were presented to the study committee.

The questionnaire was translated into French by a professional translator and programmed for Web administration.

The questionnaire was pretested with 5 respondents (3 in English and 2 in French) between August 12 and 17, 2009, before the full-fledged implementation of the field work. Following the pretest, minor adjustments were made to the vocabulary used in the introduction of the questionnaire and to a small number of questions. All in all, the questionnaire appeared practical although the duration (about 40 minutes on average during the pretest) was a concern.

The final questionnaire is reproduced in Appendix A.

Sampling Strategy

The population of study was all members of the National Capital Chapter of the Canadian Evaluation Society. A list of 638 members was sent to the research team on August 11, 2009 and updated on August 31, 2009.

No sample was drawn. All members were invited to take part in the study.

Data Collection Operations

The main field operations were initiated on August 18, 2009. A total of 633 invitations to take part in the study were sent on that day (excluding pretest cases). Some 39 messages could not be delivered because of stale e-mail addresses, full mailboxes, etc. E-mail reminder messages were issued on August 25, September 1, September 9 and September

15. Field operations were carried out in accordance with quality standards and procedures that are described in a separate document.[1]

The last questionnaire was completed on September 24, 2009. In total, 285 questionnaires were completed. This translates into a raw response rate of 45% (285/638). Excluding cases with undeliverable messages, the response rate reaches 48% (285/599). Note that 57 members opened the questionnaire without completing it. They are excluded from the final data set.

Data Weighting

We possess no information on the make-up of the population under study. Therefore, it was not possible to compare our sample of respondents to the composition of the population of study. Thus, the survey data were analyzed unweighted.

Data Processing

Survey data were managed using VoxCo's StatXP software. Because of the use of computerized questionnaires, minimal data processing was required (for example, response categories could not be incorrect and skip logic had to be respected). Responses to the numeric open-ended questions were examined and found acceptable. Open-ended questions were coded by a single person under the supervision of the project director.

Data Analysis

Data analysis was done using basic stubs-and-banners crosstabs developed in StatXP (see Appendix B). Tables in Appendix B provide vertical percentages and means as well as statistical significance tests:

- The table chi^2 and F test lines indicate whether the two variables involved in a table are mutually dependent: one asterisk indicates that

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[1] See **Circum** *Network Inc.*, *Assessing Survey Research, a principled approach*, 2003. Available at <http://circum.com/cgi/documents.cgi?lang=an&doc=T028>.

there is a 95% probability of dependence; two asterisks, 99%; and three asterisks, 99.9%.

- The t test line identifies the columns where statistically significant differences are found between the mean for one column and the mean for the aggregate of the other columns within a sub-table: a single asterisk depicts a 95% confidence level, two asterisks correspond to a 99% probability and three asterisks to a 99.9% probability. Differences between means were tested using two-tailed t tests.

- Plus and minus signs are used within cells of the tables to indicate whether a certain percentage is smaller or larger than the aggregate of the percentages in all other columns of the sub-table. Minus signs indicate that the column has a smaller mean than the other columns, while plus signs indicate that the column mean is larger. Percentage-based differences were tested on a percentage-versus-complement basis using two-tailed binomial distributions.

Based on recognized statistical formulas, the sampling accuracy for any simple random sample of 285 respondents and a population of 638 members is ±4.3 percentage points in the worst, complete-sample case (for a proportion of 50%, at a confidence level of 95%, without design effect, and with correction for finite population). Sampling accuracy is less for sub-samples.

2.2 Focus Groups

As part of the survey questionnaire, respondents were asked to indicate whether they would be amenable to participating in "small group discussions with some respondents to dig deeper into professional needs that could be addressed by CES-NCC"; 126 participants agreed to focus group participation.

These volunteers were contacted by e-mail on December 14, 2009 (with a reminder on December 21) to confirm their interest in attending focus groups and to establish which time of day would be better for them:

breakfast time, lunch time or later afternoon. Some 59 individuals confirmed their interest. Of them, 33 could attend at breakfast time, 45 at lunch time and 29 late afternoon (some selected more than one option). On that basis, focus groups were held over lunch time.

Another contact was made on January 20, 2010 (with a reminder on January 26) to ask for availability on different dates. In the end, three groups were convened: seven federal evaluators without management responsibility formed the first group; six managers from the federal public service formed the first group; and, five evaluators from outside the federal government made up the third group.

Each group discussion last two hours. Exchanges were structured according to the guide found at Appendix C. The discussions were open and frank.

In keeping with principles of good practice of quailtative research, we have not attempted to quantify focus group results. We have rather used them to illustrate findings and to go beyond survey results.

Chapter 3

RESULTS

This chapter presents a description of the responses obtained via the survey and focus groups. Detailed survey data are available in Appendix B and referenced throughout this chapter.

3.1   Survey Respondent Profile

First, **who are CES-NCC members?** We can develop a profile of CES-NCC members from responses to various survey questions. However, one caveat must be spelled out at the outset. While the response rate achieved in this survey is respectable, there was a substantial incidence of non-response. Profiling members on the basis of survey respondents assumes that non-respondents share the characteristics of respondents. We make that assumption. The risk we take is that respondents are in fact more involved members than non-respondents, and generally closer to the evaluation world. We thus risk overstating the importance of evaluation and of CES in the professional life of CES-NCC members.

By and large, one-quarter of survey respondents (25%) became members within the past year whereas another one-quarter (29%) have been

members for one to three years and one-half (45%) for more than three years (see page B-1 for details). The high proportion of very recent members might be related to hosting the Annual Conference in Ottawa in 2009 as delegates are enrolled as CES members if they are not already.

Three-quarters (76%) of survey respondents work full time for an employer; another 12% are full-time self-employed and 6% are part-time self-employed (page B-106). Individuals who have been involved in evaluation for more than eight years are more likely to be self-employed (32%) than more recent evaluators, as are men (29%) compared to women (11%).

The **federal public sector** employs two-thirds (65%) of survey respondents (page B-107). This is followed by the **private sector** (20%) and the **not-for-profit sector** (6%). Female respondents are more likely to work in the federal public service (73%) than male respondents (53%). The same is true of evaluators with up to three years of experience (81% work in the federal public service) compared to those with four to seven years (72%) or eight years or more of experience (50%).

Setting aside those who don't know how many individuals work for their employer, **one-half (49%) of survey respondents indicate they work in organizations with up to 50 employees**, one-quarter (25%) in organizations with 51 to 1,000 employees and one-quarter (27%) in organizations with more than 1,000 employees (page B-108). There is no surprise in finding out that federal evaluators work in larger organizations as do those who are included in larger evaluation teams. More experienced evaluators tend to work in smaller organizations (and are also more likely to work in private sector organizations as we saw above).

Again, setting aside those who could not supply this information, **one-fifth (19%) of survey respondents work alone in evaluation or with a single colleague**. One-quarter (24%) work in evaluation teams comprising between three and eight evaluators and more than one-half (58%) work in evaluation teams of nine evaluators or more (page B-109). Evaluation teams are larger in the federal public service. Respondents with the least evaluation experience tend to work in larger teams.

Three-quarters (75%) of survey respondents work in units that spend more than 50% of their time on evaluation; four in ten (41%) are immersed in evaluation-only units (page B-111). Workgroup involvement in evaluation is higher in the federal public service, in larger evaluation units, and (somewhat tautologically) for those more involved in evaluation work.

One-quarter (29%) of survey respondents dedicate **all their time** to evaluation and another one-quarter (40%) give it more than **half of their time** but not all of it (page B-112). One-quarter (28%) give **less than half** of their time to evaluation work. Respondents from the federal public service, respondents working in larger evaluation teams and female respondents tend to devote more of their time to evaluation than their counterparts.

One-half (52%) of survey respondents define themselves as producers of evaluation results for their own organization and one-third (33%) are producers for other organizations (page B-113); in total, that means that **85% of respondents are producers of evaluation** as opposed to users or researchers on evaluation. Many of the respondents who produced evaluation work for organizations other than their own displayed characteristics of private sector evaluation research suppliers (longer tenure as members, more years of experience in evaluation, small evaluation teams, more likely males).

One-half (50%) of survey respondents indicated that they are tasked primarily with **research**, data collection and data analysis, while four respondents in ten (41%) associated themselves with **management**, administration and coordination (page B-114). The research orientation is more characteristic of recent members (64%) and recent evaluators (69%) although there is still one-quarter indicating a management leaning in these groups. Note that 40% of respondents who indicated that they supervise other evaluators also declared that their primary tasks were research-related.

About 1 survey respondent in 10 (12%) has 5 years or fewer of experience on the labour market; equal-size groups have 6 to 20 years of experience (44%) or more than 20 years of experience (40%) (page B-115). On

average, respondents have 19 years of experience in the workplace. While recent members and new evaluators tend to have less workplace experience than others, it is worth noting that one-fifth (20%) of new members and one-fifth (20%) of respondents with up to 3 years of experience have 21 years or more of workplace experience. In the same groups, one-half (48%) has 6 to 20 years of experience. CES-NCC new members and new evaluators are experienced in other spheres of work. Female respondents and respondents from the public service tend to have less workplace experience than their counterparts.

One-third (32%) of survey respondents have 3 years of experience in evaluation or less; they average 1.6 years (page B-116). Overall, respondents average 9 *years of evaluation experience*. Brand new members average 4 years. Respondents from the federal public service average 7 years in evaluation compared to 13 years for evaluators of other milieus. Female evaluators average 8 years compared to 11 years for male evaluators.

Two-thirds (68%) of survey respondents indicated that they possess a Master's degree (page B-120). An additional 12% have completed a doctorate.

Two-thirds (62%) of survey respondents are women (page B-121). This is a proportion similar to that observed in other studies of Canadian evaluators.

Survey respondents' age averages 45 (page B-122). Respondents from the federal public service are younger (43) as are members of larger evaluation teams and those with less experience in evaluation and female evaluators (43).

Of survey respondents who self-identified, 83% indicated that they are "Caucasian in race or white in colour", 1% that they are "Aboriginal" and 16% that they are neither (interpreted as visible minorities) (page B-123).

3.2   Current Involvement

How involved are CES-NCC members in chapter activities? Exhibit 3.1 describes the proportion of survey respondents who indicated that they took part in various CES-NCC activities. Almost all respondents indicated that they receive informational e-mails from CES-NCC; some recent members may not yet have received one of these messages.

The second most recent activity is visiting the CES-NCC Web site; 82% of survey respondents indicated that they do so. Note that, notwithstanding the details offered in the questionnaire, it is possible that some respondents may have confused the CES-NCC Web site and the national CES Web site. This was actually confirmed during the focus group discussions.

One-half of survey respondents indicated that they attended a breakfast session (56%) or a learning event (51%) in the past two years. More than four in ten (43%) attended a professional development workshop.

Survey respondents who supervise evaluators were more likely to have attended breakfast sessions than non-supervisors (67% vs. 47%), as were those with eight years of evaluation experience or more (68%). Federal public servants were more likely to attend learning events (56% vs. 41%) and PD workshops (48% vs. 34%).

EXHIBIT 3.1
Frequency of Participation in CES-NCC Activities
in the Previous Two Years

Activity	% yes ↘	Page
Received informational e-mails from CES-NCC	92%	B-6
Visited the CES-NCC Web site	82%	B-7
Attended a CES-NCC breakfast session	56%	B-3
Attended a CES-NCC annual conference/learning event	51%	B-4
Attended a PD workshop offered by the CES-NCC	43%	B-2
Attended another CES-NCC event	19%	B-5
Note: n = 285		

Summing up the number of "yes" associated with breakfast sessions, learning events, workshops and other events, we get a participation scale that runs from zero (no such participation in the past two years) to four (took part in all four types of events). On average, survey respondents took part in 1.7 events (page B-127). Participation increased with length of membership (although there might be reverse logic here as those who do not participate can be presumed to be more likely to discontinue their membership). Evaluators in small workgroups participate less (1.3 vs. 1.9 in medium-size groups). Participation is also higher among respondents with eight years of evaluation experience or more (1.9) compared to those with up to three years of experience in evaluation (1.5).

That new evaluators are less attracted to CES-NCC activities is an important finding. It may be key to growth in membership and participation as well as in nurturing the profession to aim for better attraction of this segment of the membership.

3.3   *Product Satisfaction*

How satisfied are members with the current offering from CES-NCC?
Exhibit 3.2 summarises the ratings of satisfaction given by survey respondents for each activity they attended in the past two years.

EXHIBIT 3.2
Satisfaction with CES-NCC Activities

Activity	Score[1] ↘	% sat.[2]	n	Page
OVERALL SATISFACTION	**68**	**66%**	**285**	**B-14**
CES-NCC breakfast session	74	78%	161	B-9
CES-NCC annual conference/learning event	72	78%	140	B-10
Other CES-NCC event	71	69%	52	B-11
PD workshops offered by the CES-NCC	69	69%	123	B-8
Informational e-mails from CES-NCC	68	61%	262	B-12
CES-NCC Web site	65	59%	235	B-13

[1] Satisfaction score: average rating where "very dissatisfied" is assigned a value of 0 and "very satisfied" is assigned a value of 100.
[2] Percent satisfied or very satisfied among those who rated their satisfaction.

Breakfast sessions and learning events produced equal levels of satisfaction with scores of 74 and 72 respectively and 78% of survey respondents indicating they were "satisfied" or "very satisfied" with these events. Satisfaction with these CES-NCC services was the same in all subgroups analyzed except for women who were more satisfied than men with learning events (76 vs. 67).

Professional development workshops were somewhat less satisfying then the first two types of events: 69% expressed satisfaction regarding them.[1] Satisfaction with them was higher among recent members (75) than members of more than three years (64), among public servants (72) than among other milieus (56) and among women (72) than among men (63). The relatively low satisfaction score outside the federal public service may be a concern.

Satisfaction is lower with regard to communications with members: informational e-mails and the Web site garner about 60% of satisfied survey respondents. There is no statistically significant variation among analyzed subgroups with regard to these satisfaction scores.

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[1] Note that, in customer satisfaction research, it is quite common to measure 70% of satisfaction (satisfied or very satisfied) among consumer of a product or service; it is actually considered a low score. Customer satisfaction literature suggests that only "very satisfied" customers can be thought of as loyal and even then loyalty is not total. Merely "satisfied" customers can be lured away by an offering that could make them "very satisfied".

Survey respondents rated their overall satisfaction with CES-NCC services as "satisfying" 47% of the time and as "very satisfying" 12% of the time (page B-14). Considering those who did not take a stand, 66% indicated satisfaction, for an **overall satisfaction score of 68 points**. This level of satisfaction is pervasive: no statistically significant differences were found. For the reasons outlined above, this level of satisfaction is also a worry.

Notwithstanding these lukewarm results, two-thirds (65%) of survey respondents indicated that they were "very likely" to renew their membership; an additional one-fifth (21%) were likely to do so (page B-15). Calculated by assigning 0 to 100 values to each of the five scale points, the **average likelihood to renew score is 89**. Likelihood to renew was lower for new members (83), non-supervisors (86), federal government employees (86), and those not spending more than half their time on evaluation work (85).

The reason why satisfaction does not line up with likelihood of renewal can probably be found in the focus group results where participants praised activities... if they had taken part in them. CES-NCC activities received very high qualitative reviews as part of these discussions. Here are some specific observations.

Regarding the **2009 learning event**, several participants really liked the event format. They appreciated that it was free, well run and well attended, that it was very participatory, that it combined structured and unstructured features, that topics were of interest to participants. Attendees indicated that it was a good way to learn what problems people have and what their needs are. Since the event regrouped individuals based on interests, it creating a fruitful dynamic. The few criticisms heard made reference to the little time there was to discuss topics and to the fact that it was not really an opportunity to learn, but rather one to look outside one's box. Whlie this participatory learning event appeared successful, very few participants indicated that they opened the subsequent e-mail which contained names of participants and conclusions from discussions.

There was a fair amount of confusion among focus group participants between **communications** and **Web sites** under the responsibility of the

NCC chapter and the national CES. In fact, most comments likely concern national communications and Web efforts.

Current communications are not seen as excessive. in fact, some criticized CES for a lack of communications: they expected that the CES President would lead communications and help shape the community (with news-worthy items, what happened, what's coming up, etc.). They considered that communications were not enough community-building.

Some indicated that they wanted CES-NCC communications to emanate from CES-NCC, not from the Willow Group.

Of those who had visited the CES-NCC Web site, several indicated that they had a hard time finding the information they were seeking. The CES-NCC Web site could be used to get input from members to inform advocacy positions the section could take.

A few participants suggested that there is no point in duplicating efforts between the local chapter site and the National site. In their view, the chapter site should serve only chapter-specific initiatives.

3.4   *Product Value*

Which products or services do CES-NCC members value most? The survey of members contains a wealth of information on member wants and needs. Exhibit 3.3 summarises part of this evidence.

Survey respondents indicated that the CES-NCC should put a large emphasis on advanced training for evaluators. In a second tier of services, respondents emphasized current information on evaluation, support to new evaluators and face-to-face learning events. Close behind are basic training for evaluators and provision of learned information on evaluation.

It seems to this analyst that survey respondents want the CES-NCC to be a practical agent of professional development for the members rather than a general promoter of the profession or an evaluators' club. Of course, given

enough resources and energy, the chapter can probably be as
multidimensional as the list of desires presented in Exhibit 3.3 suggests.

EXHIBIT 3.3
Desired Emphasis Regarding CES-NCC Services

Activity	Score[1] ↘	% a lot[2]	Page
Advanced training relevant to evaluators	85	48%	B-22
Provision of current information on evaluation	79	41%	B-25
Support to new evaluators	78	37%	B-20
Face-to-face learning events	78	34%	B-17
Basic training relevant to evaluators	76	36%	B-21
Provision of learned information on evaluation	76	31%	B-26
Web site	70	24%	B-18
Networking events	70	21%	B-24
Advocacy or the promotion of evaluation	69	26%	B-23
Support to students	65	16%	B-19

Note: n = 285
[1] Emphasis score: average rating where "no emphasis" is assigned a value of 0 and "a lot of emphasis" is assigned a value of 100.
[2] Percent selecting the fifth point on a five-point scale of emphasis.

There were some minor (albeit statistically significant) differences in some
subgroups in the ratings of some of the service items. However, these
differences were not material enough to be worth noting individually and
they did not amount to patterns of needs or wants that were different for
some segments of the member population. There are two exceptions:
individuals who have been members for more than three years are more
likely to value face-to-face events (page B-17), and federal evaluators are
more likely to value basic training (page B-21).

Exhibit 3.4 summarises the details survey respondents provided regarding
the type of events that would be of interest to them. The suggestions are
generally not revolutionary — often riding on what is already done. Also,
some ideas were not within the purview of CES or of the CES-NCC.

EXHIBIT 3.4
CES-NCC Services of Interest to Members

Topic	Details supplied by respondents on each topic (in decreasing order of mentions)
Distinction between basic and advanced training	**Basic training**: relates to core knowledge that all evaluators should have (often equated with the Essential Skills Series) **Advanced training**: assumes basic understanding of evaluation concepts; digs into complex topics and news/advanced approaches; examples given include approaches, methods and issues in evaluation.
Provision of current information on evaluation	Inform on recently released reports, documents, evaluation and learning tools; use the Web site andn push e-mail for distribution; develop Web applications based on member input, interaction and involvement; showcase examples; develop a newsletter (monthly or less frequent); list events and opportunities.
Support to new evaluators	Learning events including workshops; networking events and Web 2 networking; mentoring opportunities; basic evaluation information kits; information on the profession of evaluator
Face-to-face learning events	**Content**: advanced courses (no particular topic); monitoring and evaluation basics; research methodology; working with (federal) policies, standards, directives; best practices; cost-effectiveness and cost-benefit analyses; cutting-edge, emerging topics; case studies; managing evaluations **Methods**: workshops; expert speakers; breakfast sessions; communities of practice
Provision of learned information on evaluation	**Content**: recent literature; trends in evaluation publications; lessons learned from excellent examples; syntheses of literature. **Methods**: Web site postings and data bases; link up with other organizations already in the learned information business; use push e-mail, conferences and the CJPE.
Web site	Upcoming events; evaluation literature; evaluation guides and tools; current news; sample cases of evaluation reports and documents; easy access to information; career/contract opportunities; Web 2 tools
Networking events	Breakfast sessions are preferred followed by lunches and late-day events; include a speaker and a theme; link with other associations and organizations; workshops are considered thematic networking events; mentoring programs as well.
Advocacy or the promotion of evaluation	Be present with federal organizations (inform, promote, debate); explain the (positive) role of evaluation everywhere possible; promote professional credentials; develop promotional material for communication, including Web presence aimed at non-evaluators; showcase examples of successful evaluations; develop policy positions; promote education in evaluation including the development of a Master's degree; aim beyond the federal government.
Support to students	Introductory workshops; scholarship and awards; presence of CES-NCC during studies (showing off evaluation and the Society); student employment opportunities; networking events; mentoring program; lower fees for membership and events; internship program

Note: responses to open ended questions.

The CES-NCC places professional development very high on its list of priorities for action. So do members, as Exhibit 3.3 shows. But what type of professional development is in demand and at what level? Exhibit 3.5 presents the level of emphasis that survey respondents suggested the CES-NCC places on each of a series of professional development topics and levels of training.

The five most emphasized topics were:
- cost-effectiveness and cost-benefit analyses;
- assessing data reliability, validity and trustworthiness;
- data analysis and interpretation;
- research design; and,
- communicating evaluation results.

However, as the exhibit show, the next five or six topics are very close behind.

There are no major differences from group to group in the desired emphasis placed on various professional development topics. However, generally, the following groups tend to place more emphasis than their counterparts on several topics: federal evaluators, non-supervisors and evaluators in larger work units.

Exhibit 3.5 carries one clear message concerning the preferred level of training. One-third (31%) of survey respondents indicated that they would emphasize introductory training (defined as "focussing on basic information with little hand-on learning"). In comparison, ***two-thirds (65%) selected an emphasis on the intermediate level of training*** (defined as "providing in-depth information and hands-on learning") and one-half (51%) emphasized advanced training (which "covers challenging topics and focusses on discussion among informed parties"). This emphasis on intermediate level training is found in each of the topics; it is a pervasive observation.

EXHIBIT 3.5
Desired Emphasis Regarding Professional Development Topics for Self

Topic	Score[1] ↘	Introductory[2]	Intermediate	Advanced	Pages
Cost-effectiveness and cost-benefit analyses	78	28%	69%	57%	B-41, 61
Assessing data reliability, validity and trustworthiness	77	32%	59%	58%	B-39, 59
Data analysis and interpretation	77	29%	64%	60%	B-40, 60
Research design	76	31%	65%	53%	B-33, 53
Communicating evaluation results	76	24%	66%	53%	B-42, 62
Designing performance measurement systems	75	27%	67%	58%	B-44, 64
Evaluation theories and evaluation models	74	37%	62%	53%	B-30, 50
Evaluation planning	74	30%	69%	45%	B-32, 52
Quantitative data collection methods	73	34%	70%	49%	B-38, 58
Qualitative data collection methods	73	31%	72%	51%	B-37, 57
Evaluation utilization	73	24%	66%	56%	B-43, 63
Program theory and logic models	71	40%	66%	49%	B-31, 51
Professional evaluation standards	68	39%	61%	47%	B-28, 48
Managing evaluation projects	68	25%	67%	51%	B-46, 66
Organizational analysis for evaluation	68	24%	63%	51%	B-45, 65
Professional ethics	65	42%	57%	50%	B-29, 49
Assessing environmental outcomes	65	24%	68%	40%	B-34, 54
Identifying data sources	64	37%	60%	38%	B-36, 56
Developing and using people skills	64	33%	62%	61%	B-47, 67
Systematic document and literature reviews	63	32%	65%	35%	B-35, 55
OVERALL		31%	65%	51%	

Note: n = 285,
[1] Emphasis score: average rating where "no emphasis" is assigned a value of 0 and "a lot of emphasis" is assigned a value of 100.
[2] Percent selecting each level of training; multiple selections allowed. Only those who scored 4 or 5 on the 5-point emphasis scale were asked to specify the level of training; therefore, the number of cases is different for each subtable.

Almost one-half of all survey respondents (47%) indicated that they currently supervise the work of individuals who are involved in evaluation (page B-68). These respondents were asked to determine which areas of training and levels of training would be beneficial to their evaluation staff.

EXHIBIT 3.5
Desired Emphasis Regarding Professional Development Topics for Staff

Topic	Introductory[1]	Intermediate	Advanced	No need ↗	Pages
Quantitative data collection methods	23%	54%	46%	1%	B-80
Assessing data reliability, validity and trustworthiness	25%	53%	44%	2%	B-81
Qualitative data collection methods	24%	58%	37%	3%	B-79
Evaluation planning	35%	56%	28%	4%	B-74
Research design	27%	54%	33%	4%	B-75
Data analysis and interpretation	24%	56%	42%	4%	B-82
Evaluation theories and evaluation models	30%	52%	32%	5%	B-72
Cost-effectiveness and cost-benefit analyses	30%	53%	44%	6%	B-83
Designing performance measurement systems	29%	59%	39%	7%	B-86
Systematic document and literature reviews	27%	49%	29%	7%	B-77
Program theory and logic models	26%	51%	33%	7%	B-73
Communicating evaluation results	27%	52%	35%	8%	B-84
Developing and using people skills	30%	57%	30%	9%	B-89
Managing evaluation projects	30%	52%	30%	9%	B-88
Organizational analysis for evaluation	29%	50%	28%	11%	B-87
Identifying data sources	28%	47%	24%	12%	B-78
Assessing environmental outcomes	29%	41%	21%	17%	B-76
Professional evaluation standards	31%	43%	18%	18%	B-70
Evaluation utilization	27%	46%	27%	19%	B-85
Professional ethics	28%	33%	21%	23%	B-71
OVERALL	28%	51%	32%		

Note: n = 135
[1] Percent selecting each level of training; multiple selections allowed.

Exhibit 3.5 presents the results. Its rows are ordered so that topics with higher felt need (low "no need" percentage) are at the top. That's where (qualitative and quantitative) data assessment and analysis issues lie, followed by evaluation planning and research design. These most important topics are very research-oriented. At the other end of the need scale (lower need), we find professional ethics, concerns of evaluation utilization and evaluation standards — relatively soft topics that refer to evaluation as a profession rather than evaluation as a research activity.

As for the level at which professional development of supervised staff should be aimed, the same exhibit suggests that the demand for intermediate level training is larger: one-half (51%) of selections were for intermediate training ("providing in-depth information and hands-on learning") compared to one-quarter (28%) for introductory training and one-third (32%) for advanced training.

Advocacy was identified as an important priority. During focus groups, many stated that Treasury Board Centre for Excellence in Evaluation is not playing an active role in this regard. Participants mentioned a requirement to promote the usefulness of evaluation, to explain what evaluators do (compared to other professionals), to connect evaluation with public interest, to defend evaluation practice, etc.

Among the advocacy activities proposed were:
*   to highlight the results of evaluation;
*   to highlight best practices in evaluation;
*   to take positions and make recommendations in the public debate (e.g., respond to the recent David Zussman[1] piece);
*   to advocate for quality in evaluation;
*   to encourage managers to use evaluation thinking;
*   to promote minimum training in evaluation at the senior management levels;
*   to seek media coverage for evaluations completed;
*   to include evaluation in the events of other professional associations (e.g., having a CES booth at another association's conference);
*   to ask universities to develop courses to address training needs of evaluators;
*   to liaise with other professionals (e.g., auditors).

It was suggested that advocacy efforts should be started at the chapter level because it will take too long for CES National to put its act together.

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[1] David Zussman, What ever happened to program evaluation?, *IT in Canada*, 2010
http://www.itincanada.ca/opdfs/a11513.pdf

Some indicated that advocacy should come only after evaluators have defined evaluation standards on an empirical basis, so that there is content to defend and a professional basis for judgement.

3.5 Place

What are the best service delivery mechanisms for CES-NCC members? Exhibit 3.6 arrays the results of asking survey respondents how much emphasis they would like CES-NCC to place on various delivery approaches.

Survey respondents assigned more emphasis to Web-distributed documents and half-day events, followed by breakfast sessions and full-day events. Videoconferences and teleconferences were considered the least interesting options; this finding was repeated in focus group discussions although it was suggested that events could be recorded for further webcast.

Breakfast sessions were more appealing to survey respondents who were members for more than three years and to respondents with eight years or more of experience in evaluation — possibly those who have less difficulty networking in an informal environment.

Breakfast sessions were generally well received by focus group participants: they consider that they are a good way to stay informed of what is going on; it is easy to get approval to attend; the topics are interesting; they are cheap. Focus group participants who had never attended a breakfast session explained that it is difficult to get downtown at 8:30AM and that topics are too administrative, not interesting enough.

It was suggested that breakfast sessions could be improved by making them less formal to allow for more discussion and networking: for example, an arm-chair debate could initiate discussions in the room.

EXHIBIT 3.6
Desired Emphasis Regarding Delivery Approaches

Activity	Score[1] ↘	% a lot[2]	Page
Web-distributed documents	72	28%	B-98
Half-day workshops/conferences	72	27%	B-91
Breakfast sessions	67	31%	B-90
Full-day workshops/conferences	66	24%	B-92
Web-based events	53	16%	B-94
Multi-day workshops/conferences	49	12%	B-93
Paper-published documents	49	10%	B-96
Videoconferences	35	4%	B-96
Teleconferences	32	5%	B-95

Note: n = 285
[1] Emphasis score: average rating where "no emphasis" is assigned a value of 0 and "a lot of emphasis" is assigned a value of 100.
[2] Percent selecting the fifth point on a five-point scale of emphasis.

Given the choice between presentations given by Canadian experts or by American experts affiliated with the Evaluators' Institute, six survey respondents out of ten (61%) chose… both; one-third (33%) chose Canadian experts over American experts and a small segment (4%) made the opposite choice (page B-100). The general view obtained from focus groups was similar: trainers have to be recognized experts (not necessarily published), good deliverers, with in-depth experience. Most participants would prefer a senior official from Canada over a renowned American academic who would not know about the Canadian context. There was a sense that some individuals involved in successful evaluation shops could be very good trainers.

Most focus group participants prefer **on-site training** as opposed to electronically-delivered training. Face-to-face approaches foster exchanges among trainees and the contextualisation of the material discussed. Very formal presentations could be done on-line; for example, there could be an on-line version of ESS because it is a very one-way event.

The **preferred format for professional development** events was a popular theme during focus group discussions. The lecture or classroom

format collected generally positive reviews when used adequately. It was seen as appropriate for trainees and when one has limited initial knowledge; for example, ESS is seen as an entry-level offering that is very employer-oriented. It was also considered appropriate to get advanced training in a niche area, provided by an expert.

Other characteristics of good training mentioned in focus groups included:
- containing theory as well as enough practical application so that participants leave with an ability rather than a simple knowledge;
- conveying new knowledge in the context of the working environment of the trainees (e.g., people in not-for-profits may not be interested in the Treasury Board evaluation policy);
- providing best practices to trainees so that the knowledge can be applied more easily and rigorously.

The appropriate length of training events was variable but most few indicated that more than one day was difficult. The exception was training for new evaluators that could take place over several days.

Focus group meetings were an opportunity to discuss whether CES-NCC should organize training into a ***series of events building up to a coherent curriculum*** or simply offer ***one-off events*** on an opportunistic basis. For some participants, the most valuable training is attached to a university or certificate program. For them and for some others, formal training should be part of a larger program to provide perspective — a curriculum. For CES-NCC, this could mean identifying a series of courses that should be taken and simply offering a list of available suppliers.

Others indicated that, for job-related needs and particular/narrow needs, one-off training is useful; it does not need to be inserted in a larger program-of-study logic. However, one-off training is seen by some as not going beyond the surface. For themselves, managers tended to value *ad hoc* training over curriculum-based training but they were in favour of a curriculum approach for staff. Curriculum-based training could be focussed on segments (like new evaluators) or on areas (like health evaluation).

According to some, CES will need to build a training program in support of the implementation of its credentialing program. CES-NCC could work with

the local universities to build such a program that would be bilingual, would offer a range of courses, would be offered downtown in the day time.

Discussions around **networking** needs were very animate during focus group discussions. Networking was defined as sharing among people with similar interests. Several shared a need to establish networks. Such networks would have to be tied to their interests in terms of evaluation practice or of subject areas. Existing events were criticized as not being conducive to establishing such common-interest networks.

There was a suggestion to foster "special interest groups" that could meet to discuss common-interest topics (e.g., health evaluation). While members of the SIG would give life to the group, CES-NCC could provide infrastructure to assist them (e.g., Web services, meeting location, member list sharing). Breakfast sessions could also be modified to make room for more interactions. Sharing distribution lists of people who attended an event could be a good tool.

It was suggested that CES should make a searchable version of the list of members available in a member-only section of the Web site. Members could identify their interests so that networks could be formed.

CES-NCC has to be careful to not tailor only to the needs of federal government members. For example, consultants have different sets of interests and issues (e.g., problems dealing with government).

The **Lunch-and-Learn format** (brown-bag meeting in a low-cost location with a presentation volunteered by members to open discussion) was appreciated by many because of its informal nature which made for a safe environment for participants. The short, lunch-time meetings are also easy to justify. The open forum is good for sharing knowledge, concerns, opinions, etc.

Much of what is done now by CES-NCC is federal government oriented. Still, there is a sizeable portion of membership which is **outside the federal government**; it should not be left out.

3.6   *Price*

How much of an issue is the pricing of activities? One-third (34%) of
CES-NCC members defray their membership fees themselves while the
employer pays the fees for two-thirds (page B-105). However, The
proportion of members who pay the membership fees themselves grows to
one-half (46%) among non-federal employees (23% among federal
employees) and 61% among individuals who work in evaluation teams of
one or two individuals.

Price was mentioned several times as a barrier in comments relative to
learning events, although it did not amount to a major theme. In focus
group discussions, it was noted by some that it is easier to get their
employer to pay one higher-cost membership fee annually with free events
through the year than to pay a lower annual fee and to have to get
approval for additional training cost through the year.

Pricing also includes the amount of time one devotes to an activity. Survey
respondents indicated that they would be "able to devote" on average four
days "to taking part in CES-NCC activities (including professional
development events, networking events, informational events, etc.) over
one year" (page B-16). New members were more available than others.

3.7   *Promotion*

How do CES-NCC members want to be reached? We don't have much
information on preferred means of communication. Some 86% of survey
survey respondents did indicate that they would welcome e-mail messages
from CES-NCC up to once a month (page B-27) but only 13% expected to
receive them once a week.

3.8   *Motivations*

How central is evaluation for CES-NCC members? Commitment to evaluation varies among CES-NCC members. As Exhibit 3.7 shows, attitudes to evaluation as a profession are scattered over the full scale offered to respondents.

EXHIBIT 3.7
Attitudes Regarding Evaluation as a Profession

Attitude	Dis-agree 1	2	3	4	Agree 5	Score	Page
Evaluation is a profession	2%	5%	14%	28%	50%	80	B-119
Professionally, I consider myself an evaluator first and foremost	10%	12%	25%	24%	29%	63	B-117
I feel that I belong to a community of evaluators	6%	17%	27%	28%	21%	60	B-118
Note: n = 285							

Many CES-NCC members believe that "evaluation is a profession": one-half (50%) strongly agree with this statement whereas one-quarter (28%) agree. The agreement score is 80 and not statistically significantly different among respondent subgroups. Among most CES-NCC membership, evaluation is an established profession.

One-half (53%) of respondents indicated that they consider themselves an evaluator first and foremost. The corresponding overall score of 63 varies from 45 among new members to 72 among members of more than three years; and from 44 among those who spend up to one-half of their time on evaluation compared to 75 among others.

One-half (49%) of respondents stated that they feel that they belong to a community of evaluators. This sense of community is, again, lower for new members and for those less active in evaluation.

3.9   *Competition*

What is CES-NCC direct competition? We were not in a position to assess intangible competition (such as preferring a quiet breakfast with family over a professional breakfast session on certification). We only looked at the direct competition represented by other professional associations.

By definition, respondents are members of the CES. Among them, the largest group (38%) comprises individuals who are a member of no other professional organization (page B-101); that is the situation of the majority of new members and of new evaluators, and almost a majority among non-supervisors and federal employees. "Other professional associations" come second as 21% of CES-NC members belong to them as well.

The Lunch-and-Learn for Evaluators group regroups about one respondent in five (18%). In addition, 47% of individuals who are not "members" of this group indicated that they have knowledge of its existence (page B-104). Thus, 57% of CES-NCC members know about the Lunch-and-Learn for Evaluators group.

Some 16% of respondents are members of the American Evaluation Association (AEA). One-quarter of experienced evaluators are members of the AEA. Finally, one in eight respondents (13%) is a member of a discipline-related association.

One in twenty (5%) members consider themselves also membesr of the Environmental Evaluators Network. Adding the 17% of non-members who claim knowledge of this group (paga B-103), we conclude that 21% of CSE-NCC members know about the Environmental Evaluators Network.

Factoring in the fact that several CES-NCC members don't belong to another professional body, seven out of ten (71%) CES-NCC members identify first with the CES (page B-102). Second in this regard are "other professional associations" which are the prime reference for 7% of members. Note that CES' position is not as comfortable among individuals

who spend less than half of their time on evaluation work: 56% of them identify CES as their strongest (or only) professional connection.

Chapter *4*

CONCLUSIONS AND RECOMMENDATIONS

This chapter extracts key findings from the previous chapter and draws conclusions and recommendations from these findings.

4.1   Key Findings and Conclusions

Exhibit 4.1 presents the key descriptors of CES-NCC membership. CES-NCC members are primarily federal employees but there is a significant contingent of private sector employees and a relatively small group of employees of not-for-profit organisations. One-half of members work in small organizations (50 employees or fewer). About eight in ten are producers of evaluations who work in groups mostly active in evaluation and have jobs where they do mostly evaluation. One (large) half of members self define as researchers while one (small) half are managers. One-third of members have only up to three years of evaluation experience but eight in ten have completed graduate degrees.

In sum, the main segment of CES-NCC members is individuals involved mainly in producing evaluation in groups focussed on evaluation. For three-quarters of CES-NCC members, evaluation is core to their professional life. There is a second segment comprising members for whom evaluation is one thing they do among other things they are responsible for. CES-NCC members are highly educated but a significant number of them have only a short experience in evaluation.

EXHIBIT 4.1
Key Descriptors of CES Membership

Descriptor	% of CES members
Federal employees	65%
Private sector employees	20%
Not-for-profit employees	6%
Work in organizations of up to 50 employees	49%
Work in groups dedicating at lest 50% of their time to evaluation	87%
Dedicating at least 50% of their time to evaluation	79%
Producers of evaluation (as opposed to users or researchers)	85%
Responsible primarily for research tasks	50%
Responsible primarily for management tasks	41%
3 years of evaluation experience or less	32%
4 to 7 years of evaluation experience	23%
Having completed a graduate degree	82%

CES-NCC members indicated that they attended 1.7 chapter events on average over the previous two years. More interestingly, more experienced evaluators reported higher participation than less experienced evaluators. This may highlight a challenge for CES-NCC: attracting newer evaluators to chapter events.

Overall satisfaction with CES-NCC services is lukewarm, at 68 points. However, 89% indicated an intent to renew their membership. Why the disconnect? Possibly because CES is in a monopoly position for many evaluators who need professional support and have nowhere else to go. This is not a comfortable position for CES-NCC.

Some CES-NCC services work well for members. The 2009 learning event was well received and produced rave reviews; participants appreciated the

innovative formula and the opportunity to meet other evaluators. Communications from CES-NCC are also generally appreciated although there is a thirst for more regular information on NCC-specific issues.

Members indicated that they expect CES-NCC to focus first on training and professional information. Networking is a second priority, followed by advocacy.

There are two categories of training that members refer to:
- basic training for new evaluators which includes the equivalent of the Essential Skills Series; from members' point of view, this type of training could be developed further. There is support for this training segment to be curriculum-based, i.e., to offer a suite of courses that would constitute a coherent basic evaluation training set. There might be ten or twelve courses in such a series;
- advanced training for experienced evaluators; this type of training would include one-off sessions that would be led by experts who are able to place their material in a Canadian context. This type of training would include theoretical considerations but also hands-on practice so that trainees learn a skill on top of acquiring knowledge.

Although there was substantial interest in all subject matters presented to members, the five most popular training topics were: cost-effectiveness and cost-benefit analyses; assessing data reliability, validity and trustworthiness; data analysis and interpretation; research design; and, communicating evaluation results. This focus on evaluation methodology was also found in the topics selected by managers for their staff.

In terms of format, members prefer face-to-face, off-work site training. For new evaluators, events could span over several days, but experienced evaluators find it difficult to attend events longer than one day.

While distance training is second to face-to-face training in members' preferences, some suggested that webcasting (even if only after the actual offering) would improve the reach of chapter events.

Networking is members' second priority. Networking was defined as sharing among people with similar interests. Members commented that existing

events were not conducive to networking either because (1) there were no opportunities to establish dialogue, (2) events were not aligned with specific interests, or (3) there were no mechanisms to maintain contact. While CES-NCC itself might not be responsible for establishing networks, it could develop mechanisms that facilitate networking.

The Lunch-and-Learn initiative was identified as a successful one in this regard. Based on simple brown-bag meetings in a low-cost location with a presentation volunteered by members to open discussion, this mechanism is appreciated by many because of its informal nature. The short, lunch-time meetings are also easy to justify to superiors. The open forum is good for sharing knowledge, concerns, opinions, etc.

Advocacy is seen as an important CES responsibility by many. To members, it means improving the profile of evaluation, publicly demonstrating evaluation value, promoting quality professional values and behaviour, and taking positions in public debates. For many members, it is an absolute necessity to ensure that evaluators are listened to and that evaluation is properly funded. Members recognize the difficulty of CES' involvement in advocacy. Taken individually, each member is limited in the action they can take and each member must weight the possible personal consequences of taking stands. Collectively, since CES has no permanent secretariat, it is difficult to build sustained advocacy efforts — which require regular environmental scanning as well as a strategic approach to making an impression and to reacting to events. Finally, there is no consensus as to whether advocacy is primarily a national responsibility or a CES-NCC chapter opportunity.

Annual membership fees are outside of the purview of the CES-NCC chapter. It is good to know, however, that many indicated that higher annual fees associated with free events through the year are easier to get approved by employers (who defray fees for two-thirds of members). Cost of events was mentioned as a barrier several times — although it is not the actual absolute cost that is the problem as much as the difficulty of getting any expense approved in organizations.

On the communications front, there is considerable confusion between communications emanating from the chapter and those from national

CES. Many members did not differentiate the two with regard to the national weekly broadcast message and to the different Web sites. Members' expectations are that national CES would inform them of general issues in evaluation as a discipline and of international trends whereas the chapter would inform them of regional issues and opportunities. They recognize that the distinction between the two zones is not clear-cut. The CES-NCC Web site does not appear to be a resource members would go to unless directed by e-mail communication.

4.2   *Recommendations*

Findings from this study lead to the following recommendations.

Training

1. CES-NCC, possibly with the help of the CES Vice-President, Professional Designation, the CES Professional Development Committee Chair, and representatives from the Canada School of Public Service and NCR universities, should develop a high-level curriculum for new evaluators. CES-NCC should then identify and publicize a list of course offerings available in the NCR that correspond to that curriculum. Where feasible, CES-NCC should sponsor the delivery of courses as part of this curriculum.

2. CES-NCC should identify existing training offerings in the areas of interest to experienced members. CES-NCC should then coach trainers to adapt their material to the evaluation context and to offer content as well as hands-on practice. CES-NCC should sponsor the delivery of these courses in the NCR.

Networking

3. CES-NCC should develop a strategy to support the implementation of *Niche Interest Groups* (NIG) based on areas of practice or topic areas. Such a strategy could include the organization of seed events to regroup evaluators with similar interests, the construction and

distribution of lists of individuals sharing interests, training on network creation and maintenance, training on Internet-based tools available to support networking, making venues available at low or no cost for meetings, etc.

4. The format of breakfast sessions should be revisited. Consideration should be given to moving them to lunch time or duplicating them. These sessions should be organized so as to facilitate networking: this could include simple techniques like name tags and business card pooling around interests, the construction and sharing of participant address lists; it could also involve changing the format of events to improve exchanges.

5. CES-NCC should consider building a service on its Web site where members could volunteer to register to a list of evaluators available for members only. This list could feature member interests and be searchable so that groups of common interest could be identified.

Communications

6. CES-NCC should define its expectations regarding its Web site and build a relevant development strategy.

7. CES-NCC should plan monthly e-mail communication from its president to members. Such communication would describe the current situation in evaluation in the NCR, identify current issues, state CES-NCC positions on such issues and inform members of developing issues. The purpose of these communications would be community-building beyond the federal government scene.

8. All communications from CES-NCC should be branded as CES-NCC and not the Willow Group. In particular, e-mail communications should emanate from the CES-NCC secretariat.

Pricing

9. Where feasible, CES-NCC should continue to offer events free of charge for members.

Advocacy

10. CES-NCC should take an active role in the advocacy efforts of CES National.

APPENDIX A
Questionnaire

APPENDIX B
Detailed tables

APPENDIX C
Focus Group Guide

INTRODUCTION

Thank you for accepting to take part in this discussion about the local chapter of the Canadian Evaluation Society. Your involvement is very much appreciated.

This is going to be an informal discussion although I do have a certain number of topics I want to touch upon. Feel free, though, to open the discussion in ways that appear most useful to you.

There are observers in the room who represent the CES-NCC. They will not take part in the discussion, at least not until we reach the end of the allotted time period. The views that you will express here will not be attributed to you as an individual but rather to a member of this group, and group membership will remain confidential.

Remember that:
• there are no right or wrong answers; there are only your views;
• everyone's opinion is important to this research;
• no recording is made of this discussion; notes will be taken and discarded once analyzed.

The topics for discussion are:
• the delivery of professional development;
• events not related to professional development;
• communications between the chapter and members and among members;
• what must be preserved and what must be improved.

Do you have any questions at this point?

INTRODUCTIONS

Let's go around the table. I would like you to introduce yourselves and to indicate how often you take part in CES events.

DELIVERY OF PROFESSIONAL DEVELOPMENT

The results of the survey conducted among members give us good indications of the topics of interest to members regarding professional development (PD) and of the level of detail sought. There are fewer indications of the best delivery methods, however.

What are your preferred methods for professional development?
- Do you prefer classroom instruction or another approach?
- Do you prefer lectures, seminars or another form of PD event?
- Do you prefer to go to a location outside your normal environment?
- Do you prefer in-person events or virtual events?
- How much time are you willing to devote to PD?

Have you ever attended a CES-NCC breakfast session?
- If yes. Did you like the format? Would you attend again?
- If no. Why not? Was it related to the time, the format, the topic?
- Do you have suggestions for themes of interest to you that could be addressed in breakfast sessions?

Do you think CES should offer PD events on an *ad hoc* basis or should there be a program of events that would form a "collection"?
- What would you expect such a "collection" to be? For example, a group of logically liked events such as the Essential Skills Series, or a group of events that lead to some certificate, or a group of event in support of achieving a status like that of Credentialed Evaluator?
- On what basis should CES-NCC plan its PD event offer?

Thinking outside of the box, what suggestions would you have for CES-NCC regarding the delivery of PD events?

(To managers) Do you think that your staff professional development needs are similar or different from yours? In what way are they different?

EVENTS NOT RELATED TO PROFESSIONAL DEVELOPMENT

The survey of CES-NCC members also indicated that there is an appetite for events that are not PD-related. A recurring theme is the need for networking and information exchange.

Do you personally share that need for networking?
• Please describe your need for networking.
• Should such networking be restricted to evaluation professionals or should CES-NCC explore networking with others such as performance measurement specialists, strategic planners, marketing specialists, survey researchers, policy analysts, etc.?
• What do you want to get out of networking with others in evaluation?
• Is such networking primarily social or primarily professional?
• Do you expect networking events to be structured or informal? Describe an ideal event.

Have you ever attended a Lunch-and-Learn event?
• What did you like about it?
• What could CES-NCC learn from this? How can it use this to develop events useful to you?

Do you think that CES-NCC should do more with regard to networking?
• What type of involvement do you think CES-NCC should have in this regard?

Are there types of events other than networking and PD, already discussed, that you see CES-NCC getting involved in?
• How about advocacy? Do you think CES-NCC should devote more efforts to promoting evaluation or not?

COMMUNICATIONS BETWEEN THE CHAPTER AND MEMBERS AND AMONG MEMBERS

Communication is another important theme in the survey of CES-NCC members. That includes communications between CES-NCC and members as well as among members.

How would you characterize CES-NCC communications with its members as of now?
• What would you expect them to be?
• What should CES-NCC inform you about?

How do you find the current CES-NCC Web site (distinguish the CES-NCC site and the national site visually)?

- Do you ever visit the CES-NCC Web site?
- What do you use it for?
- Can you find what you are looking for on that Web site?
- What would you expect to find on the CES-NCC Web site?

How would you characterize communications among members of CES-NCC?
- Would you expect much communication among members?
- What kind of communications would be most useful to you?
- How can CES-NCC help build these communications?
- Is it realistic to aim for a situation where NCC evaluators feel a part of a community of evaluation professionals?
- What would need to be done to achieve such a goal?

WHAT MUST BE PRESERVED AND WHAT MUST BE IMPROVED

What are the aspects of the CES-NCC that work well as of now and that should be preserved in the future?

What aspects of the CES-NCC objectives or operations should be improved?
- What would it take for you to consider CES-NCC an important component of your professional life?