Evaluation in Canada in 2025: what could be, what should be, and what to do now

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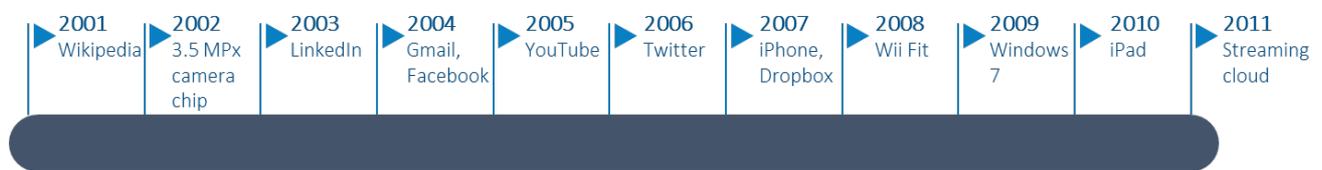gauthier@circum.com

Where is evaluation likely to be in 2025? The Australasian Evaluation Society issued a 'predict the future' challenge to a number of international evaluators, including the author, in September 2015. This paper, focusing primarily on Canada but with international implications, is the result.

Partisans of chaos theory and complex systems analysis would probably say that predicting the future is a futile endeavour. Indeed, 10-year projections appear vain when we look back a decade and observe the massive changes that have occurred in our world (Figure 1). Ten years ago, Wikipedia, Facebook, Gmail and LinkedIn were in their infancy; Twitter, the iPhone and the iPad did not exist. Six years ago, we were getting excited about Windows 7, and 'Big Data' was being invented. From what we knew in 2005, could we have projected the 2015 situation in data availability and communications?

Figure 1. Timeline of data innovations

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Wikipedia	3.5 MPx camera chip	LinkedIn	Gmail, Facebook	YouTube	Twitter	iPhone, Dropbox	Wii Fit	Windows 7	iPad	Streaming cloud

This might suggest linear projections for the state of evaluation are doomed. As well, we do not have a proven conceptual dynamic model of the development of evaluation on which to base our projections. Chaos theory teaches us strange attractors can emerge and disrupt the system at any time, taking it in unexpected directions. For example, if not for a few individuals who probably had the idea over a cold beer, 2015 might well not have been the International Year of Evaluation. Could we have predicted that in 2005?

1. Framework

Because I crave structure, in this paper I analyse evaluation trends at five levels: the individual evaluator, evaluation practice, evaluation users, evaluation associations (using the Canadian Evaluation Society as an example), and the international context.

I describe the state of evaluation affairs in Canada in 2004 based on an article I co-authored at the time, and also present my perception of the 2015 situation in Canada. I next project in a more or less linear fashion to 2025 based on the trends identified through a comparison of 2004 and what I know of the current Canadian situation. I then offer a view of what ought to be in 2025, which is more of a wish than a prediction, and I analyse what, in my personal opinion, should be done to reach across the boundaries between the projected situation in 2025 and the ideal world.

This analysis is summarised in Table 1.

Table 1. State of evaluation in Canada across time

	2004	2015	2025	Ideal 2025	Requirements to reach across boundaries
Individual evaluator	Social researchers	Professional evaluators	Overspecialised	User-oriented generalist	Care for own development
Evaluation practice	Collaborative	Diversified, ossified	Balkanised	Flexibility, rigour, use	Invest in knowledge transfer
Evaluation users	Performance measurement	Varied, limited knowledge transfer	Less relevance	Everyone	Promote, connect
Evaluation associations	Threat from others	300 Credentialed Evaluators	Weak associations	Strong advocates	Professional designations
International context	35 VOPEs, burgeoning	158 VOPEs	'Big Brother'	Support and respect	Conduits and buffers

VOPE = voluntary organisation for professional evaluation

2. 2004

In 2004, I asked 12 evaluators from across Canada to take stock of the state of evaluation in Canada in their region or province.[1] Using that evidence and other sources to complement it, let's see what the situation was at each of the five levels of my framework.

2.1. Individual evaluator

In 2004, many of us thought evaluators possessed skills that other professions did not have. However, evaluators at that time were positioned as social and economic researchers, who were skilled at using empirical data collection and analysis methods to provide a strong foundation for program and policy assessment. Evaluators were not seen as theoreticians; they were students of the real world, accustomed to dealing with the necessary compromises called for by the uncertainties of real life and focusing on providing relevant information.

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[1] Gauthier, B., Barrington, G., Bozzo, S.L., *et al.* (2004). The lay of the land: evaluation practice in Canada today. *Canadian Journal of Program Evaluation, 19*(1), 143–178.

On the negative side, program evaluators did not have an identity of their own. They found it difficult to demonstrate the value of evaluation, particularly in the face of short-term performance monitoring.

2.2. Evaluation practice

Evaluation practice in 2004 emphasised the involvement of program managers, the participation of stakeholders and overall collaboration.

Program evaluation, however, had been generally unable to absorb performance measurement requirements that had surfaced in the previous years. Where they tried to adapt, evaluators sometimes did this at the expense of their specific skill sets by neglecting key evaluation issues and losing emphasis on rigour.

The university system in 2004 featured few study programs in evaluation, in part because the weak self-identity of evaluators drew them to train in disciplines such as sociology, psychology or public health.

2.3. Evaluation users

Faced with limited resources, program managers emphasised performance measurement over evaluation. Various events propelled performance monitoring and short-term performance measurement to the front of the management scene. Despite various results-based management initiatives, many managers were content with a performance measurement framework that often focused on obvious outputs, rather than providing a more in-depth assessment of program logic and performance to explain why certain results were or were not observed. Positioning evaluation as an ad hoc exercise with little or no follow-up within organisations prevented evaluators from building connections with program managers and demonstrating the value of their skills.

2.4. Evaluation associations

In the decade or two before 2004, fields of practice with clearer identities, such as auditing and accounting, had encroached into what evaluators consider their program assessment territory. At the same time, evaluators were less than proactive in building their professional capacity and the profile of their profession. In 2004, there was a real threat to the very existence of program evaluation: lack of demonstrated value, weak definition of evaluation as a domain of inquiry, program monitoring being seen as a substitute approach by many, and lack of strategic positioning in organisations could have translated into diminishing desire to fund program evaluation.

The Canadian Evaluation Society (CES) had 24 years of existence by 2004, but it had very limited financial resources and was heavily dependent on volunteer work. Its strategic directions were not entirely clear; its ability to communicate with members and stakeholders, and to promote evaluation as an important organisational process was limited. The key activities were entry-level training, an annual conference and a learned journal.

2.5. International context

In 2004, there were about 35 voluntary organisations for professional evaluation (VOPEs).[2] The annual budget of the 4-year old International Organisation for Cooperation in Evaluation (IOCE) was about $30 000, including only $5000 of operational funding. I think it is fair to say that the IOCE was searching for its identity and purpose in 2004, while the International Development Evaluation Association was only 2 years old and taking its first steps.[3]

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[2] Rugh, J. (2013). The growth and evolving capacities of VOPEs. In J. Rugh & M. Segone (eds), *Voluntary organizations for professional evaluation (VOPEs): learning from Africa, Americas, Asia, Australasia, Europe and Middle East* (pp. 13-40). UNICEF.

[3] http://ideas-global.org/history-of-ideas/

3. 2015

So where are we now?

3.1. Individual evaluator

In 2015, Canadian evaluators are very likely to identify themselves as professional evaluators rather than social scientists. A sense of belonging to something of a profession has developed. Many people are still practising evaluation part-time because they have multiple roles in their organisation (eg being in charge of planning, reporting, and performance measurement and evaluation) or because they conduct evaluations as well as other types of studies (eg organisational development, social measurement, market research). However, a substantial group of people see themselves primarily as evaluators and publicly position themselves as such.

That said, based on CES membership, the number of evaluators in 2015 is no greater than in 2004.

3.2. Evaluation practice

Evaluation practice in 2015 is highly diversified, exemplified by the resonance of words and phrases such as participatory evaluation, empowerment evaluation, theory-based evaluation, contribution analysis, mixed-mode approaches and multiple lines of evidence. Michael Quinn Patton stated during a recent visit to Ottawa that Canada and New Zealand are the two strongholds of developmental evaluation.

Meanwhile, attempts at comparative and quantitative measurement of incremental impacts are few and far between. The most prolific evaluation environment in Canada (the federal government, which produces around 150 evaluation studies per year) has seen its practice ossified by an evaluation policy with rigidly constrained standards that are unable to be shaped to suit the specific circumstances of each evaluation.

3.3. Evaluation users

It is difficult to describe evaluation users in general. Types of users in 2015 appear to be more diversified. Performance measurement has lost favour with some program managers, who have accepted the usefulness of periodic independent reviews. Governments, faced with difficult fiscal environments, have implemented ruthless mechanisms to reduce spending; where available, evaluation information is used along with other types of evidence. Unfortunately, the 'use-by' period for performance and relevance information is short; some say information that is more than 2 or 3 years old is stale. Such a position makes it difficult for evaluation information to be available exactly when a decision needs to be made.

Evaluators are making some limited efforts to adapt their evaluation study messages and their knowledge transfer methods to the circumstances of each study, to better address user needs.

3.4. Evaluation associations

In 2015, the CES is experiencing a burst of activity and enjoys a position of credibility. Non-existent in 2004, the Professional Designations Program and the associated Credentialed Evaluator designation have been operational for 5 years. There are some 300 Credentialed Evaluators who are committed enough to their profession to invest time and money in the credentialing process. This program alone has given the CES a long-term strategic structure because the Credentialed Evaluator program requires outreach efforts, professional development opportunities, and rigorous policies and processes. It also contributes to positioning the evaluator as a professional who has a special set of skills and competencies. In this way, it shapes the relationships the CES enjoys with its government, education, commercial and nonprofit partners.

The CES hired an Executive Director in 2015; this is a first, although the society has always had a clerical secretariat. Otherwise, the CES runs on volunteer fuel, a renewable but also extinguishable resource.

3.5. International context

In 2015, there are 158 VOPEs listed on the EvalPartners site.[4] EvalPartners itself has become a thriving force behind a host of international activities. It piloted the declaration of 2015 as the International Year of Evaluation by the United Nations. In 2015, EvalPartners identified 77 events that celebrated evaluation practice, and supported improvement and utilisation, including the 2015 Australasian Evaluation Society conference, where this paper was first presented.[5] The 2015 IOCE revenues were in excess of $650 000, up from $30 000 in 2004.

4. Projection to 2025 based on linear projections

Now, where would we land if we projected these trends to 2025 by predicting, more or less linearly, where the changes observed over the past decade would take us if they continued for another decade? (I acknowledge this is a flawed approach, because it ignores threshold effects, strange attractors, limits to growth and feedback loops, among other complications, but it is the best that can be done with the information at hand; the next section will adjust this viewpoint.)

4.1. Individual evaluator

From being general social scientists in 2004 to professional evaluators in 2015, our colleagues of 2025 could become overspecialised practitioners with highly specific skills that require advanced professional learning and technical prowess, but reduce the professional's ability to intervene at a practical level. I have seen this happen in market research: 30 years ago, a single analyst would discuss product design, positioning, distribution channels and pricing strategy, but now each component of the marketing strategy has its own specialist. I don't see this as a positive trend.

4.2. Evaluation practice

The continued diversification of evaluation practice could lead to its 'balkanisation' – that is, fragmentation of the field into subdomains that do not maintain open channels of communication. This would contribute to the overspecialisation of practitioners because, without dynamic professional exchanges, each subdomain tends to create its own jargon, methodologies, standards and practices, and eventually its own identity. We currently see a bit of this with social impact analysts who are busy defining their domain, labelling methodologies and building associations. Some evaluators consider social impact analysis a simple branch of evaluation that is interested in social impacts – whereas evaluators are interested in all sorts of impacts. But if we let the trend continue, the disjoint will become permanent and there will be no way back, because new boundaries will profit the few who created them.

4.3. Evaluation users

If evaluators become more specialised and the field evolves towards balkanisation, there is a risk that evidence produced by evaluators will focus on rigour rather than relevance – a very old debate in evaluation – and on methods rather than on advice, and will be topic focused rather than user focused. Is it possible that evaluation will follow the path of auditing? In my assessment, auditing is now more focused on the integrity of the audit process than on the usefulness of its results for the decision maker. Who will the evaluation users be if an evaluation report becomes a technical document obsessed with surviving peer review, rather than a knowledge-full communication of relevant observations?

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[4] http://www.evalpartners.org/about/international-mapping-of-evaluation-associations

[5] http://conference2015.aes.asn.au/

4.4. Evaluation associations

The balkanisation of the field increases the risk of narrowing the interests of individual evaluators and justifying the creation of a series of more specialised associations with smaller membership bases. The evaluation world of 2015 has already been characterised by a proliferation of national, regional and international associations. In comparison, certified management consultants and accountants are organised globally into large-scale associations of hundreds of thousands of members; they have a strong voice, establish binding standards (even if not to the same extent as auditors) and still maintain a local presence. The multiplication of small-scale associations tailored to an overly specialised field would reduce the impact of evaluation as a profession.

4.5. International context

Between 2004 and 2015, there has been a clear trend towards increased national-level institutionalisation of evaluation, increased complexity of associative networks, and increased imposition of standards of practice by international bodies such as the United Nations and the Organisation for Economic Co-operation and Development, which have their own self-interests. Coupled with the balkanisation of the field, projecting this trend forward could translate into a quasi-Orwellian world where a few international institutions govern the practice of professional groups individually too weak to counter these demands.

5. Ideal world in 2025

The description I have just presented of a possible 2025 is a little scary, bordering on totalitarian and apocalyptic; it predicts a lack of creativity and limited exchanges among different components of the profession. Let me tell you what my ideal 2025 would be.

5.1. Individual evaluator

The evaluator is a generalist, able to integrate concerns from a number of angles and coordinate the contribution of specialists. The evaluator's prime concern is to provide sound advice to the decision maker, while balancing concerns of rigour and social justice. The evaluator knows to adjust their practice to the requirements of the evaluation setting. If a particular evaluation requires evaluation skills, knowledge, experience or competency that the evaluator does not possess, they turn down the assignment or team up with others to ensure the evaluation team is up to the task. Above all, evaluators identify with evaluation as their field of practice, introduce themselves as evaluators, keep up to date with evolving evaluation theory and practice, and contribute to the continuous improvement of evaluation knowledge.

5.2. Evaluation practice

Evaluation practice is flexible yet rigorous. There will be theories and approaches in 2025 we do not suspect yet. But, ideally, practice will adapt to the circumstances while remaining a transparent, valid, reliable and reproducible process. Transparency increases the credibility of the evidence; validity ensures the evidence is pertinent to the problem being analysed; reliability is a precondition to the ability to generalise the evaluation findings to contribute to system-wide decision making; and reproducibility is necessary to convince the sceptics that the findings are not simply the product of one's bias or particular circumstances.

In 2025, evaluation should be more Pawson-and-Tilley realist[6] and more Mayne-focused[7] on contribution. Where action is unfolding in real time, evaluation should know to use rapid assessment approaches. Evaluation should aim to understand, rather than judge, and support, rather than assess.

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[6] Pawson, R., & Tilley, N. (1997). *Realistic Evaluation.* London: Sage

[7] Mayne, J. (2001). Addressing attribution through contribution analysis: Using performance measures sensibly. *The Canadian Journal of Program Evaluation, 16* (1), 1-24. http://evaluationcanada.ca/system/files/cjpe-entries/16-1-001.pdf

Evaluation, in an ideal 2015, will not be primarily an academic domain. It will remain the 'systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making'[8] (according to the definition now used by the CES, which may well survive the test of time). The goal of evaluation is to contribute to social effectiveness, social efficiency and social justice. Evaluation findings that remain known only to the evaluators and evaluands are of minimal use. Therefore, in 2025, evaluators should have developed and integrated knowledge translation and knowledge transfer strategies in their practice. In 2025, the evaluation report may not exist anymore. If it does, it may be a technical appendix needed for transparency and reproducibility, but it will not be the main mechanism used to communicate findings and influence decision making. Knowledge transfer will take place as part of the evaluation process.

5.3. Evaluation users

In the ideal 2025 world, evaluation information is used by everyone: employees, program managers, beneficiaries, policy makers, parliamentarians, boards of directors, social groups, interest groups, media, citizens (including marginalised groups), and so on. In an open democracy, evaluation information will be available to everyone. Because each citizen and each group representing citizens brings a different angle to valuing actions and results, approaching evaluation with a realist lens augments the likelihood that citizens will find benefits in evaluation, because a realist approach emphasises how programs affect different groups differently. In the ideal 2025 world, resources are available to serve these various perspectives, instead of only the perspectives of stakeholders rich and powerful enough to fund evaluations.

In the ideal world of 2025, evaluation is used at least as much for learning and organisational development as for accountability and reporting. Evaluation is less bureaucratic and more humanistic than in 2015; its primary use is for social promotion and social justice, rather than for control and fiscal austerity.

5.4. Evaluation associations

In an ideal 2025, evaluation associations in general, and the CES in particular, will be strong advocates for evaluation contributing to social effectiveness, social efficiency, and social justice. Evaluation associations will have resources, connections, profile, credibility, strategies and stature to speak authoritatively, and they will partner with key social bodies such as educational institutions, think tanks, policy-making organisations and the media. (This will be quite a tall order for any national organisation in existence now, even the CES, which has been in place for 35 years. It will be even more of a challenge for many national organisations that are just now taking root.)

5.5. International context

In an ideal 2025, international and regional associations support national associations in achieving this goal. International agreement on terminology, definitions, approaches, tools, standards and ethics will contribute to the professionalisation of evaluation, but practice will remain highly sensitive to local cultures, infrastructures, political systems, social structures and history. Because national evaluation practices will be so much more advanced, international funders will be able to step back from their control role.

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[8] Canadian Evaluation Society. (2014). *What is Evaluation?* Retrieved from https://evaluationcanada.ca/what-is-evaluation, downloaded August 2016.

6. What we can do now

What is needed to avoid 'apocalyptic 2025' and move towards 'ideal 2025', as depicted above?

6.1. Individual evaluator

The individual evaluator should take responsibility for their own development. Supported by universities that keep in touch with the challenges of practice and prepare students for the real world of evaluation, and by international, regional and national associations that define standards of practice, evaluators must navigate the rough waters of learning. This goes beyond simply learning evaluation theories, techniques and approaches; it includes learning about organisational dynamics, management, and how evaluation integrates management models and social praxis. Learning is also furthered by increased cross-sectoral and cross-disciplinary collaboration, because the world of evaluation is best deployed without borders. Evaluation changes at the same rate as any other field of human activity. Evaluators must question their practice, individually but especially collectively – through a community of practice, a study group, an entire association or some other reference group. Evaluation associations have a strong role to play in this regard.

6.2. Evaluation practice

To improve use of evaluation, we need the help of researchers on evaluation (mainly academics) to identify best practices in evaluation knowledge transfer and to forecast needs for adjustments to the profession to keep practitioners on track. Canadian thinkers have contributed on several fronts, including internal evaluation, contribution analysis and capacity building, but Canadian evaluation has traditionally been more oriented towards practice than theory. Academics should consider the opportunities that research on evaluation offers. There is already a very rich literature on knowledge translation and knowledge transfer; meta-analysis of this literature would be a good starting point to launch a new effort towards evaluation use.

6.3. Evaluation users

To reach a wide audience, evaluation findings will have to be promoted actively, and adapted to the individuals and groups that the findings are intended to influence. This would be a natural consequence of the careful use of the knowledge translation and knowledge transfer efforts already mentioned. Evaluators need to realise they are only one of the sources of evidence that decision makers and stakeholders refer to. Other relevant evidence brokers include university researchers, think tanks, interest groups, professional associations, lobbies, unions and the media. Evaluators compete with these groups for the attention of decision makers. To gain the attention and trust of decision makers, evaluators must learn to promote their evidence and to connect with the right intermediaries. Evaluators must think in terms of the quality of their evidence, but also its accessibility and its congruency with the target audience's preconceived notions. They must also turn their attention to themselves as credible evidence suppliers, to the timeliness of their advice, and to the value of their offering compared with other intermediaries. In brief, evaluators must learn to promote themselves and to connect with others.

6.4. Evaluation associations

I believe the CES made a profoundly important decision in 2007 to develop a voluntary program of professional credentialing for Canadian evaluators. This program was 'supported by those CES members who were more deeply involved in evaluation, were younger and had the fewest years in the workforce, planned to stay in the field, and felt that they belonged to a community of evaluators'.[9] There is evidence the designation has contributed to self-definition as a professional evaluator, recognition of competence, clarification of development needs, increased professional development, expansion of knowledge on evaluation, enhanced professional status, and so on. Most importantly to me, the CES Professional Designations Program has contributed to a sense of belonging to a

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[9] Love, A. (2015). Building the foundation for the CES Professional Designation Program. *Canadian Journal of Program Evaluation, 29*(3), 1–20.

profession. From there, the program is part of a dynamic that leads to improved professional practice and better evidence for evaluation users. I think the CES should continue developing its Professional Designations Program, based on feedback from regular member consultations and evaluations. New designations could be envisaged, such as credentialed evaluation manager and certified professional evaluator. To support the trend towards professionalisation, while maintaining a flexible and adapted evaluation practice, the CES will have to offer more professional learning opportunities, as well as ensure the evaluation standards remain mindful of diversity.

6.5. International context

I am not an advocate of one-size-fits-all solutions that would be applied to all national contexts. I think that respectful evaluation practice has to be adapted to the context, be it national, subnational, sectoral or organisational. That said, international associations have a very important role to play in improving the exchange of information, pointing national associations towards what is considered best practice elsewhere, supporting innovation, and counterweighing other international actors who have agendas that may serve their own interests more than those of evaluation practice. In that sense, international associations can be conduits as well as buffers: conduits of information and buffers against pressure.

7. Conclusion

In conclusion, I reiterate all of this analysis is built from my own perspective as a professional evaluator, as an active member of an evaluation association, and as a Canadian who has been shaped by the specific history of evaluation in Canada.

It is important to remember that how something appears is always a matter of perspective. The same object or situation can be perceived in totally different ways, depending on one's point of view. Different situations can be seen as similar when they have little in common. Alternatively, what appears to be a dramatic problem (as in the case of the sinking house – Figure 2) may well be simply the wrong way to capture the essence of the situation.

Nevertheless, I hope I have made the case that we have choices to make now and in the next few years that will shape evaluation in 2025 – and beyond.

Figure 2. Perspective influences conclusion
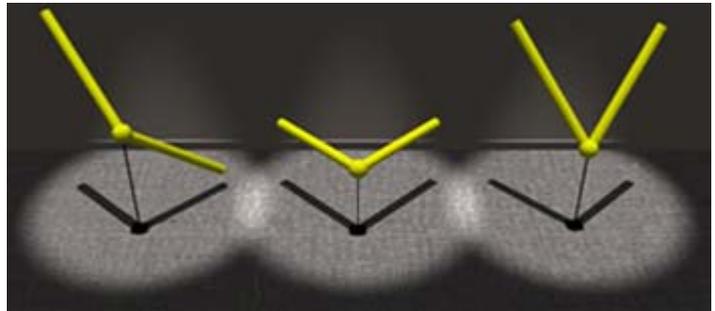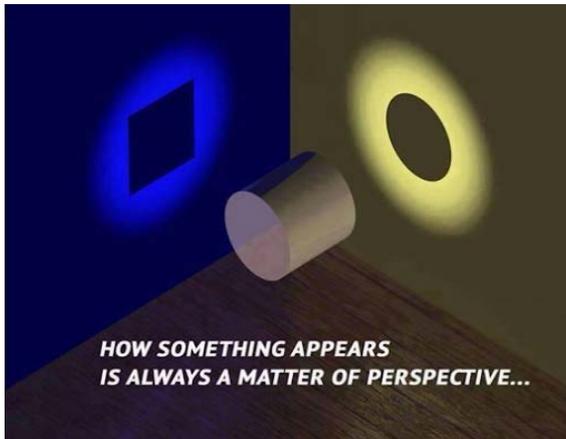
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Pawson, R., & Tilley, N. (1997). *Realistic Evaluation.* London: Sage

Rugh, J. (2013). The growth and evolving capacities of VOPEs. In J. Rugh J & M. Segone M (eds), *Voluntary organizations for professional evaluation (VOPEs): learning from Africa, Americas, Asia, Australasia, Europe and Middle East* (pp. 13-40). UNICEF. http://www.mymande.org/sites/default/files/UNICEF_NY_ECS_Book2_web.pdf