

THE CONSORTIUM OF UNIVERSITIES  
FOR EVALUATION EDUCATION (CUEE)

# BUSINESS PLAN

*for the development of*

THE CONSORTIUM OF UNIVERSITIES  
FOR EVALUATION EDUCATION

*December 19, 2008*

## 1. Introduction

This business plan reflects discussion and an agreement in principle to establish the Consortium of Universities for Evaluation Education (CUEE). At a meeting in Ottawa (March 19-20, 2008) university representatives, Treasury Board of Canada representatives and representatives for the Canadian Evaluation Society agreed to take steps to create a consortium to advance graduate education opportunities in evaluation. This document will form the foundation for the CUEE start up work plan.

## 2. Problem Statement and Goal

There is a shortage of graduate level evaluation education and training in Canada, as well as barriers to access built into the Canadian academic system, both institutional and jurisdictional. While graduate certificate and diploma programs are starting to be developed, more programs are needed, and from a student perspective, there is much room for improvement in accessibility.

With few exceptions, universities and university colleges in Canada require students to apply for admission to that institution (to Graduate Studies for example) and to maintain an affiliation with that university throughout their graduate education. Although students can take coursework elsewhere and have those courses credited towards a credential in their “home” institution, typically the courses that a student takes have to be approved in advance.<sup>1</sup> In effect, students have to negotiate the transfer of courses from other institutions to their home institution.

This plan proposes the creation of the Consortium of Universities for Evaluation Education – a collaborative arrangement to address these issues. The goal is **increase access to graduate credentials in Evaluation**. The CUEE will create and sustain opportunities for students and practitioners (in Canada and eventually abroad) to take courses for university credit that lead to graduate credentials in evaluation.

Our vision is to build towards offerings of four to six course graduate certificates in evaluation in Canadian universities, in the initial stage. Within three years, students and practitioners who are interested in graduate education/training in evaluation will be able to take coursework from one or more institutions that are participating in the Consortium, and have that coursework credited towards a credential in the “home” institution of their choice. Within five years, it will be possible to undertake Master’s programs in evaluation, building upon the mechanisms that have been developed in this project for graduate certificates in evaluation.

If the Consortium succeeds, it will be unique. If the evaluation community in Canada can come together to build a collective capacity to offer advanced education/training for professional evaluators, we will have accomplished something that will affect the trajectory of our profession for the foreseeable future.

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<sup>1</sup> Although the rules vary across universities, typically a student has to take from half to 80% of their courses from their “home” institution. Thus, in a four course certificate, the expectation would be that a student would take a minimum of two courses from their home institution.

### 3. Background

The idea of a Consortium was first raised by university representatives at a meeting of university representatives, the Canadian Evaluation Society and the Federal Government of Canada co-hosted by the Treasury Board Secretariat and the University of Ottawa in October 2006.

One purpose of that meeting was to explore the interest of the university community in contributing to the education/training of the next generation of evaluators. Based on an internal analysis, Treasury Board had previously raised concerns about the quality of evaluation practice in the federal sector<sup>2</sup>. Furthermore, Treasury Board is responsible for developing a new evaluation policy that includes an enhanced role for evaluators in the Federal Government of Canada. This will mean that there is a shortage of qualified persons to fill those positions. Coupled with projected retirements among existing evaluators in the government, there is a need to build capacity to educate more evaluators.

The Canadian Evaluation Society (CES) is a key stakeholder, given its interest in professionalizing evaluators in Canada. After having commissioned a study of professional designation options, CES has formally committed to developing a voluntary system for credentialed evaluators, where opportunities for graduate-level, evaluation credentials (or their equivalent) will play an increasingly important role.

Some institutions already have graduate evaluation credentials in place:

- École nationale d'administration publique (ENAP) offers a PhD, two different Master's Degrees and shorter certificates – all of which can include evaluation as a concentration.
- The University of Ottawa offers a five course Graduate Certificate in Evaluation, and
- Carleton University offers a six course Graduate Diploma in Public Administration with specialization in evaluation.

Other universities (University of New Brunswick, for example) are in the process of developing courses that eventually will be offered as part of a graduate certificate in evaluation. The University of Saskatchewan offers both a PhD and a Master's degree in Psychology with concentrations in evaluation. Other institutions have evaluation courses, as part of their degree programs, primarily housed in education, public policy and administration, management, psychology, and other social science faculties.

### 4. Proposed Action

CUEE is not intended to replace any existing programs, but instead, to increase the effective reach of existing and future courses and programs by making it possible for students and practitioners to access courses and programs nationally.

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<sup>2</sup> Treasury Board Secretariat. 2004. *Review of the Quality of Evaluations Across Departments and Agencies*. Ottawa: Government of Canada.

#### 4.1 Scope and Participation

This project connects three key stakeholders– universities, government and the professional society – in a partnership to develop capacity in Canada to offer graduate education for prospective and current evaluation practitioners. Participants will include universities or university colleges with an interest in developing and offering evaluation-related graduate courses and credentials. Those attending the March 19-20, 2008 meeting are listed in Annex A. Everyone at the meeting endorsed the principle of creating a consortium.

Participating institutions are being asked to appoint a person (and an alternate) who will serve as the principal liaison with the Consortium secretariat, the Consortium Council and the Operations Committee (described below). It is expected that academic units within universities will be participating members. For example, the Department of Psychology at the University of Saskatchewan would be a participant, not the University of Saskatchewan as whole. In some institutions, partnerships between two or more academic units (departments, schools or faculties) will be Consortium participants.

The Consortium will need to develop procedures for inviting or entertaining requests from other post-secondary institutions in Canada to become participants. Initially, draft guidelines and procedures will be developed by the Operations Committee, circulated among existing participants for comment and approved by a majority. We envision voting on most matters electronically.

#### 4.2 Governance

The principal decision-making body will be the Consortium Council. Participants will include the universities that have joined the Consortium. Treasury Board Secretariat (Canada) and the Canadian Evaluation Society will each have a seat on the Council. In addition to being the principal decision-making body, the Council (through the Secretariat) will serve as a strategic information and planning body, making it possible to inform each other of plans and key decisions and take advantage of opportunities to shape and to align the Consortium with emerging government and evaluation-related priorities.

An Operations Committee (three to five members) will need to be struck from among the university Consortium participants to facilitate the work of the Consortium, including operational decisions consistent with Consortium objectives, drafting policies for approval by the Consortium council, and liaison with the partners in this project (Canadian Evaluation Society and the Government of Canada). The Operations Committee will be accountable to the Consortium Council.<sup>3</sup>

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<sup>3</sup> Year One actions involving the Council, the Operations Committee and the Secretariat include:

- establishing institutional memberships and contact information for each institution;
- collecting and sharing information on evaluation education that currently exists in Canada;
- collecting and sharing course syllabi, where institutions agree to do so;
- collecting and sharing exemplars of proposals for program approvals;
- creating a bilingual website;
- members identifying and submitting declarations of intent for courses they want to develop as well as specializations they wish to identify; and
- creating and getting agreement on a set of operating principles and procedures amongst consortium members.

Some guiding principles have been drafted in Annex C to lay the foundation for the operations of the Consortium. In the first year of the Consortium's operations, a Memorandum of Understanding will be developed by the Operations Committee for the approval of the Council.

#### 4.3 Activities and Outcomes

**First**, the universities and university colleges that were included in this initial meeting will need to formally signal their willingness to join the Consortium. This Draft Plan will be circulated among prospective participants for comments and any additional changes prior to its approval as a working document. The Plan will be approved by the Council once the principal stakeholders have indicated their financial support for the Consortium and there is a mechanism for convening the Consortium Council, electronically.

Entailed in joining the Consortium will be financial commitments that will contribute to the work of the Consortium as courses and graduate certificates are developed in Canadian universities, and ensure that there are resources to sustain the Consortium once the developmental work is completed.<sup>4</sup>

The financial plan outlined in the following section, envisions a full partnership for the developmental phase of this project, including the universities that are participants in the Consortium, the Canadian Evaluation Society and the Government of Canada (a principal employer for current and prospective evaluation professionals).

**Next**, a secretariat<sup>5</sup> will need to be developed to facilitate the day-to-day work of the Consortium, including:

- ongoing communication and liaising with Consortium participants, such as development of a bilingual website and a web forum for the project to be used to communicate and to provide ways for participants to discuss issues as they arise for comment and where appropriate, for decision-making;
- obtain information from all participating institutions about the rules that pertain to admission, coursework, residency, and related issues, so that it is possible to develop a consortium-wide picture of opportunities and constraints *vis à vis* graduate education in evaluation – our baseline story;

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<sup>4</sup> In the March 19-20, 2008 Ottawa meeting, approval in principle for the Consortium (and membership on the Council) included: University of Ottawa, Carleton University, University of Saskatchewan, École nationale d'administration publique (ENAP), University of New Brunswick, University College of the Fraser Valley and the University of Victoria. Potential additions to the Council based on expressions of interest in joining the Consortium include Queens University, Dalhousie University, University of Manitoba and Waterloo University.

<sup>5</sup> The Secretariat will tentatively be housed at the University of Victoria, School of Public Administration. Discussions at the Ottawa 19-20, 2008 meeting included provision for making it possible for stakeholders to contact the Consortium in both official languages. A collaborative arrangement between UVic Public Administration and ENAP is one option for realizing this objective.

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- acquiring and maintaining an up-to-date working repository of documents (course syllabi, university regulations, admission procedures, residency requirements in “home” institutions) that is accessible to Consortium participants;
- preparing drafts of reports for review and approval by the Consortium including descriptions of existing course and credential offerings, relevant program and university procedures (admissions, normal progress, grading practices, fees);
- identifying and disseminating best practices to assist in navigating university approval processes for courses, credentials and procedures to permit students to access courses from Consortium participants for credit in their home institutions; and
- organizing future meetings of the Consortium, including periodic teleconferences among members of the Operations Committee.

Once the Consortium is formed, and an inventory of existing programs and courses is compiled by the Secretariat, courses that are offered by participants in the Consortium will be candidates for inclusion in an inventory of Consortium courses. We envision a two-stage process for approving which courses that will be available to the students of Consortium participants. In the first stage each institution will be given the final say in which Consortium courses are approved for their students.

We anticipate that within three years (by the time the development phase of this project is completed) the Consortium will have developed a process for reviewing and approving courses that are offered by participating institutions. Initially, the Operations Committee will be responsible for developing draft criteria and procedures for this review process with a view to having them approved by a majority of the Council at a face-to-face meeting.

Participants in the Consortium are responsible for their own course development and program approval procedures. Successes can be shared via the Consortium but it will be up to faculty and staff in member units to navigate local approval processes. It is possible that the Consortium will offer ways for participating institutions to partner with each other to jointly offer graduate certificates and other credentials. There will be a focus as well on courses offered online, which will make it possible for students to access them anywhere in Canada.

The Consortium will not try to harmonize fees or other costs of taking courses from participating institutions. Thus, students and practitioners who are taking courses from several universities should expect to pay the fees that apply to courses from a given university.

#### **4.4 Financial Plan**

The first three years of this project are primarily developmental. By the end of this first phase, the Consortium will be offering students and practitioners across Canada opportunities to access courses that can be credited towards evaluation certificates offered by their home institutions. As outlined above, it will be necessary to build structures and processes that facilitate Consortium business. There will be start-up costs associated with the developmental phase of this project.

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At the end of three years, the project will move into its second phase and will be self-sustaining (based on Consortium participants' annual financial contributions.)

Financial projection and initial revenues are set out in the following table:

<b>Expenditures</b>	<b>Year One</b>	<b>Year Two</b>	<b>Year Three</b>	<b>Total</b>
Set up Web site	5,000 <sup>6</sup>			5,000
Secretariat	10,000	10,000	10,000	30,000
Research Assistant	7,500	2,000		9,500
Travel	5,000	2,500	15,000	22,500
Communications	1,000	1,000	1,000	3,000
Supplies	1,000	500		1,500
Teaching release	6,000	6,000	6,000	18,000
<b>Total</b>	<b>35,500</b>	<b>22,000</b>	<b>32,000</b>	<b>89,500</b>
<b>Revenues</b>				
Treasury Board Secretariat	20,000			20,000
Canadian Evaluation Society	10,000*	10,000	5,000	25,000
University Participants	15,000**	15,000	15,000	45,000
<b>Total</b>	<b>45,000</b>	<b>25,000</b>	<b>20,000</b>	<b>90,000</b>

\* Received

\*\* Received \$17, 500

### ***Expenditures***

Setting up the Secretariat will require some start-up funding (website, student research funds to facilitate the work needed to compile documents, analyze them and assist in preparing draft reports), and some ongoing operating funds (part of a staff member, communications, and a one-course teaching release for one faculty member to work on Consortium business year around).

During the first three years, it will be necessary to hold one face-to-face meeting (in addition to the March 2008 meeting) of Consortium participants to discuss and approve major policies. We anticipate that this meeting will occur in the third year of the project

Some travel funds for the faculty member who will be working with the Secretariat and with Consortium participants is also required. As much as possible, Consortium travel will be timed to coincide with other business but the timely completion of Consortium business will require some travel that is dedicated solely to this purpose. This travel budget is intended to offset the costs of a national meeting of Consortium participants to discuss and approve major Consortium policies.

<sup>6</sup> The Consortium is committed to being a bilingual organization. The website will need to be set up so that documents are available in both official languages. We do not anticipate having resources to make all documents bilingual at this time.

## **Revenues**

The revenue sources that are projected do not include any money from grants. Although it is possible that one or more of the partners could obtain such funds, making the project contingent on the success of such efforts would, in effect, put it on hold.

The Federal Government of Canada (Treasury Board Staff) recognizes the importance of enhancing the education of evaluators. This project offers Treasury Board Staff a way to work with the academic community and with CES to create competent evaluation professionals that can assume the roles that are envisioned in the new Federal Evaluation Policy.

The Canadian Evaluation Society is undertaking a professional designations project, the principal component of which is credentialing evaluators. The Consortium project contributes to this project and provides CES with a platform for identifying competencies and fostering the integration of them into courses and programs.

Consortium participants have been asked to contribute \$2,500.00 per institution per year to this project. In 2008 we received \$17, 500 from interested institutions.

The projected budget is modest, given the scope of the work that will be undertaken. It does not reflect the considerable amount of volunteer time that will be involved as this project is undertaken – time and effort that will be essential for its success.

## **4.6 Evaluation and Performance Measurement of the Consortium**

The Business Plan outlines accountability mechanisms through its governance structure and describes a vision against which their work can be assessed. One of the initial tasks for the Secretariat is the collection of key information and data that will form a baseline story or the starting point for the CUEE.

A plan for monitoring the progress and evaluating the impact of CUEE needs to be developed as part of the start up plan. To facilitate this effort a draft logic model for the organization is provided in Annex B. Once reviewed by participating institutions and partners, the model can be finalized so that performance indicators may be developed and reported by the Executive.

It would be interesting and economical to build an evaluation of this whole effort into the course assignment of one or a group of member programs, perhaps in year two.

## **Final Word**

This plan reflects the discussions and agreements *in principle* reached in the Ottawa Symposium in March 2008. It is intended to be used by the participating representatives to pursue formal support within their respective institutions, and subsequently as the initial plan of action for this initiative.

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*Annex A: Participants and Partners*

**- Participants -**  
**2<sup>nd</sup> Symposium on Program Evaluation Education**  
**in Canadian Universities**  
**March 19-20, 2008**

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<b>Dalhousie University</b>	Emily Zbieranowski Attending the symposium on behalf of Dr.	<a href="mailto:Emily.Zbieranowski@dal.ca">Emily.Zbieranowski@dal.ca</a>		Masters of Public Administration Candidate 2008 -Research Assistant to Dr. Fazley Siddiq who is the Director of the School of Public Administration, Dalhousie University

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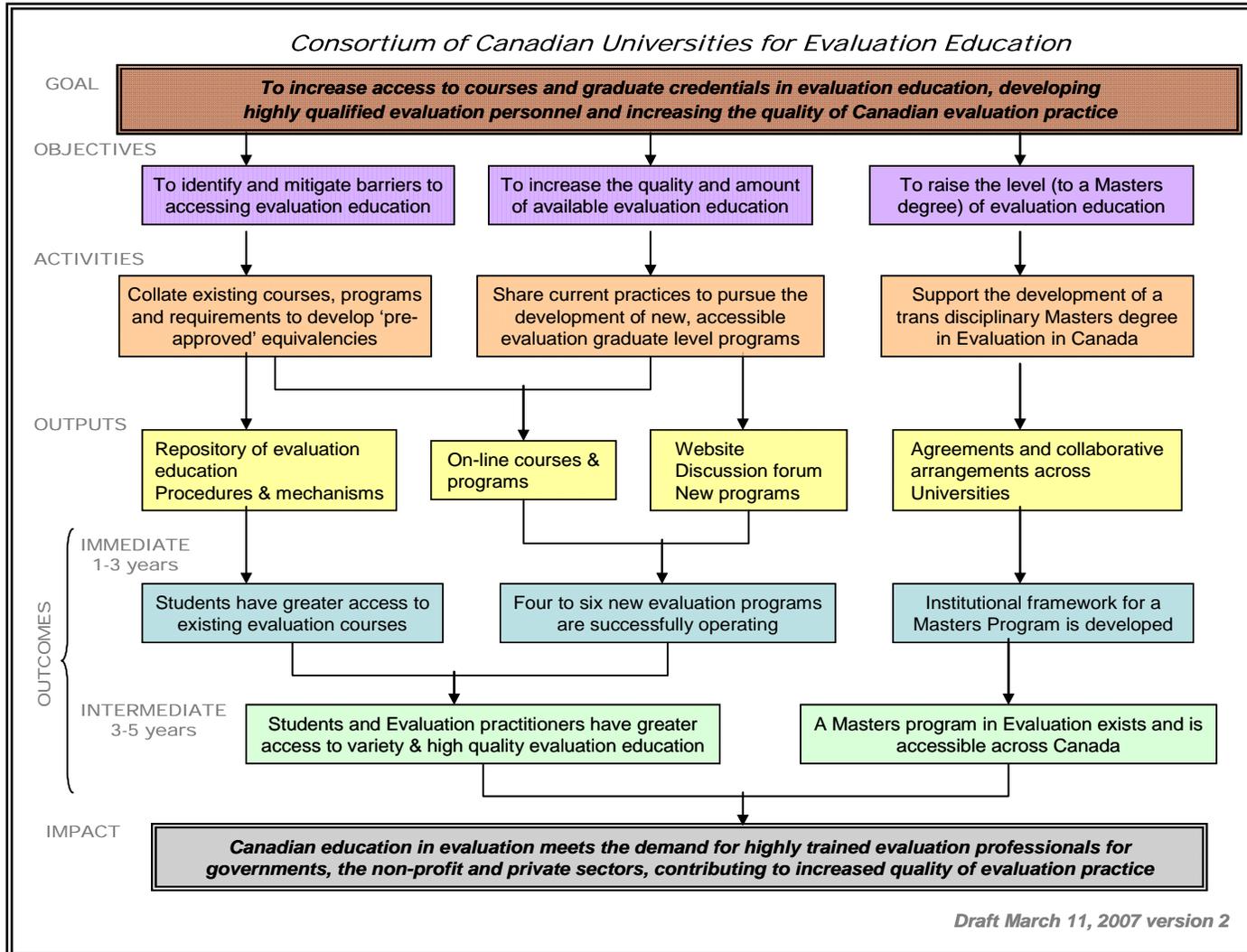
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Annex B: Draft Logic Model



## *Annex C: Guiding Principles for the Consortium of Universities for Evaluation Education*

### **Objectives:**

The Consortium of Universities for Evaluation Education is an informal Canadian organization that aims to:

- enhance access to high quality graduate level instruction in evaluation;
- operate on a nationwide basis in both Canadian official languages;
- be self-sustaining;
- be governed by universities with input from key partners;
- support the development of graduate certificate and degree programs in evaluation.

### **Guiding Principles:**

The Consortium of Universities for Evaluation Education is:

- Committed to increasing access to quality graduate level instruction in evaluation through a mix of in-person course offerings and internet-based (or distance mode) delivery mechanisms;
- Committed to pre-service and in-service professional development for evaluation practitioners informed by contemporary theory and professional wisdom;
- Committed to shared access to programs and courses among consortium members;
- Committed to being student-focused;
- Committed to maintaining high academic standards as defined within respective provincial jurisdictions;
- Respectful of the highest professional standards and ethics of professional practice in the field (e.g., Joint Committee Standards for Program Evaluation);
- Respectful of evaluation as an interdisciplinary domain of inquiry;
- Respectful of diversity of information needs of the evaluation community and contexts for practice;
- Respectful of member university interests and autonomy;
- Respectful of market trends and demands in government, voluntary, private and other sectors with interest in evaluation.

## *Annex D: Implementation Plan*

The following is a summary of tasks that will be undertaken and completed for the Consortium of Universities for Evaluation Education. The first year tasks are focused primarily on gathering and verifying information on the existing state of evaluation education in Canadian universities. Initially, an extended inventory will be completed for CUEE members, but will eventually be extended to all post-secondary institutions in Canada. A comparable project is currently underway in Claremont Graduate University, for all evaluation-related programs in the USA.

### First Year Tasks

1. The first tasks involve working through the Internet to acquire, organize and display information about the “lay of the land” of evaluation education at the graduate level in Canadian universities. We can focus initially on the Consortium members, but eventually want to get a picture of evaluation education (courses, programs) in Canadian universities more generally.
  - Beginning with the Consortium institutions and programs (UVic, UCFV, U of Saskatchewan, U of Ottawa, Carleton, Queens, U of Waterloo, ENAP, Dalhousie) we want to compile information about what is happening at each institution.
    - What programs, if any, offer credentials (certificates, diplomas, degrees) in each institution?
    - Are these programs nested in other programs ie you can take an evaluation certificate as part of a Master’s Program, or instead, are they stand alone?
    - What are the essentials of each of the programs ie number of courses required, core (what are they), electives, admission requirements (including the number admitted and when they are admitted each year), transfers to other programs at that institution ie to what extent can coursework be credited towards another credential (stacked). Some institutions might not permit double counting.
    - What are the courses that are offered? Course titles, calendar descriptions, course outlines if available, even course syllabi if available (more about this shortly)? How frequently are they offered? Are there any specializations in the evaluation-related

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credentials ie health evaluation, Aboriginal evaluation, international evaluation, etc.?

- Who are the faculty that teach evaluation courses? Names, titles, departments or schools, full time (regular) or part-time?
  - What kinds of rules exist around transferring in courses from other institutions? That information will not be available at the program level (perhaps but not likely) but instead will be available in the Faculty of Graduate Studies or a similar administrative unit. Some universities may not have a Faculty of Graduate Studies but instead have a graduate division for each faculty.
  - How are the courses and programs in evaluation education delivered? Face to face? Online? Other delivery modalities?
  - What are the fees for taking courses and programs from each institution? Do these fees vary depending on whether a student is enrolled in a Master's or a PhD program as well as a certificate program? Are certificate programs priced separately? How do fees work is a student want to take just one course and not do a whole certificate?
  - Is there a way to apply for and become an unclassified graduate student ie not be a part of any given credential (certificate, Master's Degree, PhD) so that the student can take one or more courses on the basis of professional interest? What happens to those courses if the student decides at a future point to become a credential-seeking person? Do the courses get credited, if they meet the credential requirements?
2. The second phase of this project will be to check the information that is compiled for each institution with one or more persons from each institution. The basic idea is to validate it, fill in the gaps if possible, establish a personal connection with each institutional representative, and create a sense of the Consortium working towards creating an information base that will be informative to its members.
- Validation of the information in the spreadsheets is one goal

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- Gathering information where things are missing is a second goal ie course syllabi, for example
3. The third phase in Year 1 will focus on gathering exemplars of proposals for certificate/diploma programs in evaluation that eventually can be posted on the Consortium website. The rationale for this is to provide Consortium members with ideas and possible content that can be used as they go forward with their own certificates and diplomas.
  4. Related to this third phase is an up to date indication from Consortium members regarding their planning any new programs or credentials. Timing, specializations, structure and other information will be gathered in a summary fashion.
  5. The fifth task in this first year will be to construct a web site for all Consortium members, and eventually make that website accessible to students who are planning their graduate evaluation education. We envision being able to post course offerings for all Consortium members, on a term by term basis, so that students in any Consortium institution can see what is available, where it is being offered, and how that course fits into their own program.

## **Year Two Tasks**

These tasks are subject to further discussion among Consortium members.

1. The first task in the second year will be to confirm a policy that invites other universities into the Consortium. At present, there is interest among several institutions to join, and we want to have a process in place to make that possible.
2. A second task in the second year will be to expand the scope of the “lay of the land” to include all universities in Canada. We will be focusing on graduate evaluation education, and will want to develop a complete picture of who is doing what.
3. A third task in the second year will be the process of working with Consortium members to negotiate transfer credit arrangements for courses for their students. That will mean working with the Consortium members to get agreement on “quality” of courses and delivery methods. We want students who are enrolled in any Consortium institution to be able to access courses that are pre-approved for

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credit in their home institution, subject to the rules in their own programs about numbers of courses to be transferred, etc.

4. The fourth task involves working with institutions to develop and get approvals for their own credentials. That will mean providing them with advice on their draft proposals, and the like. Ideally, their proposals would reflect the fact their students have access to Consortium courses, and therefore, they do not have to develop a full suite of courses in house. A key need across Canada will be for access to more online graduate evaluation education opportunities. Growing online programs will make the Consortium work in ways that encourage further integration of programs later on.

### Year Three Tasks

In the third year, we will be working on elaborating connections among Consortium members. One option is for students who are enrolled in a Consortium institution to be able to take a Certificate in Evaluation that is offered by the Consortium as a whole. Accomplishing this goal will mean negotiating flexible course transfer arrangements for Consortium members, but precedents exist: the Western Deans Agreement is an agreement among all graduate programs in Western Canada that graduate students can take courses for credit in any of the participating universities and transfer those courses to their home institution as long as taking that course was approved by their home institution.

## *Annex E: Resource List*

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