

October 1, 2009

Contact

Dr. A. Sidiq Ali, Principal
Research and Evaluation Consulting
www.rae-consult.com
info@rae-consult.com
905-916-0743

Title Slide - Making the Case for Program Evaluation in Corporate Training, Testing and Credentialing Programs

Slide 2 – You are Here (Like it or Not)

- Brief Overview of Program Evaluation today:
 - Growing, increasing credibility, increasing scope
 - Exciting, CES PDP (Early 2010)
- Overview of my presentation:
 - Institutionalization of Program Evaluation
 - The Role of the Evaluator
 - Corporate Training, Testing and Credentialing Programs
 - Moving beyond Psychometrics
 - Case Studies
 - Value to Clients
 - Literature Search
 - Final Words

Slides 3-5 – Institutionalization of Program Evaluation

- 1960's Social Programs in the U.S.
 - War on Poverty mid-1960's marked the beginning of large-scale government-funded evaluation, provision of: legal services, community health services; job training; nutrition supplements for pregnant women and infants; food stamps; housing vouchers; preschool education; community action programs; mental health services; and innovations in delinquency prevention and corrections.
 - The Elementary and Secondary Education Act of 1965 included a requirement for evaluation in the law.
 - Evaluation branched into other areas, as with new legislation came evaluation in: environmental protection, energy conservation, military recruiting; and the control of immigration.

October 1, 2009

- Small centres and firms were established, and university research centres expanded their mandate to include program evaluation (Weiss, 1998).
- 1970's Social Experiments
 - Housing allowances, health insurance, income taxation all bred pilot programs, which required evaluation (Weiss, 1998).
- 1980's Cut in Social Programs
- Evaluation growth stopped, but the practice continued, and continued to be refined (the use of qualitative methods, for example) (Patton, 2002)
- 1990's Social Program Comeback 2000's Evaluation at the micro-level
 - Local government, local agencies
- The institutionalization of Program Evaluation owes itself to the War on Poverty and the call for greater social justice in the United States of the 1960's.

Slide 6 - 7 – The Role of the Evaluator

- Four perspectives dominate the evaluation literature. These are resultant of the evaluator's choice of:
 - Evaluation methods
 - Evaluation models
 - Desired relationships with stakeholders
 - Contingent reactions to evolving evaluation circumstances/activities (Skolits, Morrow, & Burre, 2009).
- Weiss (1998) asserted that the traditional and still dominant role conceptualization of the evaluator is methods-based, and indicative of a neutral, detached social-scientist: "The traditional role of the evaluator has been one of objective inquiry ... She puts her trust in methodology" (p. 98).
- Some writers contend that the evaluation model focuses the evaluator's role. Traditional and more recent evaluation models tend to suggest that the evaluator is judge (Scriven, 1991), supporter of decision-making (Stufflebeam, 2001); one who empowers (Fetterman & Wandersman, 2005); as well as the role of critical friend (Cousins, 2005; Earl, Ali, & Lee, 2005).
- Some evaluation models focus on the role of the evaluator from the perspective of the evaluation stakeholders. In this light, the dominant role of the evaluator is to identify relevant stakeholders for the promotion of participation in the evaluation and the subsequent use of evaluation results (Cousins & Earl, 1995; Patton, 2008). Fetterman et al. (2005) view the evaluators' role as one of empowering stakeholders.
- Patton (2008) identified the evaluator as "collaborator, trainer, group facilitator, technician, politician, organizational analyst, internal colleague, external expert, methodologist, information broker, communicator, change agent, diplomat, problem solver and creative consultant" (p. 213). He also suggested that the role of an evaluator is contingent in response to the situational conditions of evaluation practice: "The roles played by an evaluator in any given situation will depend on the evaluation's purpose, the unique constellation of the conditions with which the

October 1, 2009

evaluator is faced, and the evaluator's own personal knowledge, skills, style, values and ethics" (p. 213). This view is somewhat controversial in the evaluation discipline today.

Slide 8 – Corporate Training, Testing and Credentialing Programs

- Overview
 - Credential –
 - “A credential is a designation, mark or stamp given to a person, organization, or program that has satisfied a set of standards. The more common credentials are education degrees, certifications, licenses, accreditations and endorsement or approvals. These credentials are similar in that they are intended to qualify the recipient, control practice and protect the public. They qualify through the standards they impose. They control because they affect people's opportunity to work, participate in a discipline or profession, or use a name or title. They protect by ensuring that only qualified people practice.” (Hale, 2000, p. xx).

Slide 9 – Moving Beyond Psychometrics

- Overview
 - Psychometrics –
 - The science of developing educational and psychological tests and measurement procedures has become highly sophisticated and has developed into such a large body of knowledge that it is considered a scientific discipline of inquiry on its own, referred to as [psychometrics \(Suen, 1990\)](#).
 - Tests are designed to measure attributes of people, [psychometrics](#) is the science concerned with evaluating the attributes of tests (Furr & Bacharach, 2008).
- Curriculum development, alignment and sampling
- Content development
- Consequences

Slide 10 – The A-ha! Moment

Slide 11 – Evaluator Competencies

- Reflective Practice competencies focus on the fundamental norms and values underlying evaluation practice and awareness of one's evaluation expertise and needs for growth.
- Technical Practice competencies focus on the specialized aspects of evaluation, such as design, data collection, analysis and reporting.
 - 2.14 – Analyzes and interprets data.
- Situational Practice competencies focus on the application of evaluative thinking in analyzing and attending to the unique interests, issues, and contextual circumstances in which evaluation skills are applied.
- Management Practice competencies focus on the process of managing a project / evaluation, such as budgeting, coordinating resources and supervising.

October 1, 2009

- Interpersonal competencies focus on people skills, such as communication, negotiation, conflict resolution collaboration and diversity (Canadian Evaluation Society, 2009).

Slide 12 – Putting it All Together to Pull Together

- The multiple hats – see Patton (2007) above
- Collaborative evaluation framework
- Technical expertise - psychometrics
- Risk-associated endeavour
- Truncated timelines

Slide 13 – Case Study 1

- Leading, North American financial institution
- 40, 000 employees world-wide
- \$ 3.7 billion in revenue in 2008
- Employee testing program (low stakes)

Slide 14 – Case Study 2

- Prestigious professional association/regulatory body in the financial sector, awarding a designation
- 40, 000 members; 2, 500 candidates
- \$2.5 million on credentialing program (2008)
- High-stakes testing

Slide 15 – Case Study 3

- Professional association/regulatory body in all sectors of the economy, awarding a designation
- 40, 000 members and candidates
- High-stakes testing

Slide 16 – Value to Clients

- Competitive advantage provided by an evaluator's competencies
 - Scope of work
 - Methodological rigour
 - Greater efficiencies
 - Data-based decisions

Slide 17 –Literature Search

- Absence in the Canadian (CJPE) literature
 - Confidentiality/Privacy agreements
 - Time limitations
 - Cost/benefit

October 1, 2009

Table 1 – Topics in Special Issues of the Canadian Journal of Program Evaluation

Issue	Topic
1991	Justice
1997	Cost-Benefit Analysis
1999	Empowerment Evaluation
2000	Educational Evaluation
2001	Provincial Evaluation: Policy and Practice
2002	Evaluation in Health and Human Services
2004	Community Mental Health Initiative
2005	20 th Anniversary Issue
2006	Evaluation Practice in Canada
2007	Educational Evaluation

Source: (Birch & Jacob, 2005)

Table 2 – Author Affiliations for Articles in the Canadian Journal of Program Evaluation (1986-2004)

Authors' Professional Affiliation	Percent (N=382)
University/Higher Education	56.8
Public Sector Evaluator	23.0
Private Sector Evaluator (incl. Consulting Firms)	11.8
Other	8.4

Source: (Birch & Jacob, 2005)

Table 3 – Percentage of Articles in the Canadian Journal of Program Evaluation Focused on Evaluation of Public Policy (1986-2004)

Five-Year Period	Percent (N=382)
1986-1990	59.0
1991-1995	34.8
1996-2000	45.5
2001-2004	68.4

Source: (Birch & Jacob, 2005)

October 1, 2009

Table 4 – Content Domain of Articles Published in the Canadian Journal of Program Evaluation (1986-2008)

Content Domain	*Percent (1986-2004) N=386	Percent (2005-2008) N=78
Mental Health & Social Services	23.8	41.0
Government	21.0	21.8
Healthcare	20.5	11.5
Education	13.7	21.8
Industry/Corporate	2.6	3.8

*Source: (Addison & Amo, 2005)

Slide 18 – Final Words

- Get out and get tuned into what the evaluation needs of private corporations are
- Opportunities are there to expand the scope of evaluation, otherwise continue to lose this market to management consultants and auditors (McDavid & Huse, 2006).
- Need for proactive mindset, and collected energy
- We can do this!

References

- Addison, E., & Amo, C. (2005). Two decades of the Canadian Journal of Program Evaluation: *Canadian Journal of Program Evaluation*, 20(3), 17-40.
- Birch, L. M., & Jacob, S. (2005). Program evaluation in Canada seen through the articles published in CJPE. *Canadian Journal of Program Evaluation*, 20(3), 1-16.
- Canadian Evaluation Society. (2009). Companion Document for Competencies for Canadian Evaluation Practice [Electronic Version] from http://www.evaluationcanada.ca/txt/20090531_competencies_companion.pdf.
- Cousins, J. B. (2005). Will the real empowerment evaluation please stand up: A critical friend perspective. In D. M. Fetterman & A. Wandersman (Eds.), *Empowerment evaluation: Principles in practice*. New York, NY: Guilford.
- Cousins, J. B., & Earl, L. M. (Eds.). (1995). *Participatory evaluation: Studies in evaluation use and organizational learning*. London: Falmer.
- Earl, L. M., Ali, A. S., & Lee, L. E. (2005). Evaluating school improvement in Canada: A case example. *Canadian Journal of Program Evaluation*, 20(3), 151-174.
- Fetterman, D. M., & Wandersman, A. (Eds.). (2005). *Empowerment evaluation: Principles in practice*. New York, NY: Guilford.
- Furr, R. M., & Bacharach, V. R. (2008). *Psychometrics: An introduction*. Thousand Oaks, CA: Sage.
- Hale, J. (2000). *Performance-based certification*. San Francisco, CA: Jossey-Bass Pfeiffer.
- McDavid, J. C., & Huse, I. (2006). Will evaluation prosper in the future? *Canadian Journal of Program Evaluation*, 21(3), 47-72.
- Patton, M. Q. (2002). *Qualitative research and evaluation methods* (3rd ed.). Thousand Oaks, CA: Sage.
- Patton, M. Q. (2008). *Utilization-focused evaluation: The new century text* (4th ed.). Thousand Oaks, CA: Sage.
- Scriven, M. (1991). *Evaluation thesaurus* (4th ed.). London: Sage.
- Skolits, G. J., Morrow, J. A., & Burre, E. M. (2009). Reconceptualizing evaluator roles. *American Journal of Evaluation*, 30(3), 275-295.
- Stufflebeam, D. L. (2001). Evaluation models. *New Directions for Evaluation*, 89(Evaluation Models), 7-98.
- Suen, H. K. (1990). *Principles of test theories*. Hillsdale, NJ: Lawrence Erlbaum.
- Weiss, C. H. (1998). *Evaluation: Methods for studying programs and policies* (2nd ed.). Upper Saddle River, NJ: Prentice-Hall.