



CONSORTIUM OF UNIVERSITIES FOR EVALUATION EDUCATION  
CONSORTIUM DES UNIVERSITÉS POUR L'ENSEIGNEMENT DE L'ÉVALUATION

# ANNUAL REPORT

---

2012-2013

This report was prepared by the CUEE Secretariat  
School of Public Administration, University of Victoria  
September, 2013

September 10, 2013

We are pleased to present the first Annual Report for the Consortium of Universities for Evaluation Education (CUEE) for the 2012-2013 fiscal year.

Although the CUEE was established in 2008, it has taken some time for its institutional arrangements to take root. Coming together as member institutions has consumed much effort and energy, especially with respect to building a collegial and professional relationship among institutions and programs across jurisdictional boundaries. Ours is a voluntary organization, which means that it cannot possibly work without genuine trust and confidence among members and the board. We credit much of this early work and vision to Prof. James McDavid, University of Victoria. Without his drive and stellar reputation, it is unlikely this organization would have succeeded as far as it has.

Much of the actual work of the CUEE did not begin until 2010, with a core group of member institutions and programs. The CUEE vision and mandate was still being negotiated, and member expectations of the CUEE varied widely. However, we believe that the CUEE is now building a core set of programs that will define it for some time.

In particular, members have committed themselves to three major program areas. First, the CUEE is committed to building the field through activities aimed mainly at supporting stronger academic programs. The Student Accessibility Project best defines this program area – members would like to see greater access to teachers and resources across the country. Creating bridges for students to access various courses from their home institutions is a first step in this regard.

Second, several members have expressed an interest in supporting professional development training as a key contribution to improving the Canadian evaluation community as a body of practitioners. The CUEE is currently working the federal Treasury Board Secretariat in its efforts to train new entrants to the evaluation function. We anticipate that this work will expand into other jurisdictions, especially provincial and municipal governments. Given the demands being placed on non-profit organizations, there is a growing demand for sound program evaluations to support accountability requirements.

Finally, members have expressed a sound interest in supporting cutting-edge evaluation research. Although in its infancy, there are exciting plans ahead for creating a national evaluation research centre.

The CUEE has come a very long way in a short period of time. We are blessed to have a strong core of institutional members and programs resident in several faculties and disciplines. We are also very fortunate to be able to draw on a collegial group of people, who are willing to support each other and to build an institution that is world-class.

There is a great deal of work ahead yet to do. We invite you to read through this report and discover some of the several things the CUEE is doing.

Each and every one of the CUEE's members is passionate about their programs, and their field. We look forward to the future when the CUEE will be doing even more!

*Karen Lawson*

Karen Lawson, Co-Chair



Robert P. Shepherd, Co-Chair

## Contents

Background .....	1
Objectives .....	1
Guiding Principles .....	1
Policies .....	2
Governance .....	2
Secretariat.....	2
Membership.....	3
Meetings .....	4
Website .....	4
SharePoint.....	4
Projects .....	4
Financial Management and Accountability .....	6
Financial Report – Fiscal Year 2012-2013 .....	7
Financial Report – Fiscal Year 2011-2012 .....	8
Tentative Plans for 2013-2014.....	9

## **CONSORTIUM OF UNIVERSITIES FOR EVALUATION EDUCATION (CUEE) ANNUAL REPORT FALL 2013**

### **Background**

The Consortium of Universities for Evaluation Education (CUEE) was established in 2008, as a voluntary association of institutions and programs dedicated to building capacity in graduate education and professional development for evaluators across Canada.

CUEE is part of a multi-organizational strategy to increase opportunities for current and prospective evaluators to acquire the knowledge and skills required to become competent evaluation professionals. One way to realize this goal is by improving access to graduate evaluation education opportunities (i.e., courses, certificates, diplomas and degrees) in Canada.

In 2010, the Canadian Evaluation Society implemented the Credentialed Evaluator designation [<http://www.evaluationcanada.ca/site.cgi?en:5:6>] which includes a requirement for education and training that can be satisfied by successfully completing a graduate-level credential in evaluation.

### **Objectives**

The CUEE aims to:

- increase the number of qualified evaluators in Canada by providing graduate education opportunities;
- offer credential programs for evaluators wanting to obtain the Canadian Evaluation Society's Credentialed Evaluator designation;
- build capacity among Canadian academic institutions to develop and offer advanced education/training for professional evaluators;
- enhance students' access to high quality graduate level instruction in evaluation;
- support the development of graduate certificate and degree programs in evaluation by sharing course syllabi, proposals for credentials and other materials.

### **Guiding Principles**

The CUEE is committed to:

- increasing access to quality graduate level instruction in evaluation through a mix of in-person course offerings and distance delivery mechanisms;
- providing pre-service and in-service professional development for evaluation practitioners that is informed by contemporary theory and professional practice;

- upholding the highest professional standards and ethics of professional practice in the field;
- respecting evaluation as an interdisciplinary domain of inquiry;
- valuing the diversity of information needs of the evaluation community and contexts for practice;
- respecting Consortium members' interests and autonomy in developing their own courses and credential programs;
- responding to market trends and opportunities in government, voluntary, private and other sectors.

### **Policies**

In January 2011, the CUEE formally adopted a Governance Policy, a Membership Policy, and a preliminary Framework for Collaboration on Shared Interuniversity Graduate Evaluation Education Courses. (These Policies are available on the CUEE website and upon request).

### **Governance**

The Consortium Council is the principal decision-making body of the CUEE. One member from each participating academic institution in good standing is on the Council. Institutional representation on the Consortium Council is for a minimum of one year. Each institution, regardless of the number of programs or academic units involved, has one vote and a maximum of two persons per institution can attend Council meetings (face-to-face or teleconference). The Treasury Board of Canada Secretariat and the Canadian Evaluation Society may each be represented by one member on the Council as *ex officio* (non-voting) members.

The Consortium Council is the strategic information and planning body (through the Secretariat), making it possible for members to inform each other of plans and key decisions, to take advantage of opportunities to coordinate CUEE member activities and initiatives, and to shape and align CUEE with emerging government and evaluation-related priorities.

The Consortium Council is co-chaired by two elected members from among the active participating members of the CUEE Consortium Council.

Since 2010, Dr. Robert Shepherd, Carleton University and Dr. Karen Lawson, University of Saskatchewan have co-chaired the Consortium Council. They were reelected for their second term in Fall, 2012.

### **Secretariat**

The CUEE Secretariat facilitates the day-to-day operations of the Consortium and is accountable to the Consortium Council. Since 2009, the CUEE Secretariat has been located at the University of Victoria,

School of Public Administration. Dr. Jim McDavid has served as the head of the CUEE Secretariat since 2009, assisted by Ms. Theresa Hunter (PhDc).

## **Membership**

The CUEE members include Canadian chartered universities or university colleges with an interest in developing and offering graduate-level evaluation-related courses and credentials. The Treasury Board of Canada Secretariat and the Canadian Evaluation Society are *ex officio* members of CUEE.

Each participating institution (programs or academic units or consortia of academic units) appoints one primary contact person and one alternate, who serve as the principal participant and liaison with the Consortium Council. Both programs and academic units within universities may participate as members, not the universities as a whole. For some institutions, partnerships between two or more academic units (departments, schools or faculties) are represented by a CUEE participant.

In 2012-2013, CUEE had the following renewing members:

- Carleton University, School of Public Policy and Administration
- Dalhousie University, School of Public Administration
- École nationale d'administration publique (ÉNAP)
- Royal Roads University, School of Leadership Studies
- University of Alberta, Faculty of Education and the Faculty of Extension
- Université Laval, Faculté de médecine, Département de médecine sociale et préventive
- University of Ottawa, Faculty of Education and School of Psychology, Faculty of Social Sciences
- University of Saskatchewan, Applied Social Psychology, Department of Psychology
- University of Victoria, School of Public Administration
- Treasury Board of Canada Secretariat (ex officio)
- Canadian Evaluation Society (ex officio)

Returning members:

- University of Waterloo, School of Public Health and Health Systems

New members:

- Memorial University, Applied Social Psychology, Department of Psychology
- Université du Québec à Montréal, Département d'éducation et pédagogie

## Meetings

Three General Meeting were held via teleconference in 2012-2013:

- September 28 2012 –summary notes distributed
- February 22 2013 – summary notes distributed
- August 2 2013 – summary notes distributed

## Website

The CUEE website was launched in the Summer of 2010. It is hosted and updated by the CUEE Secretariat: <http://www.evaluationeducation.ca/index.html>

An inventory of the courses and credential programs offered by CUEE members was made available on the CUEE website in 2012.

Updates to “News and Events” have been ongoing. The main website page has been posted in both official languages however, no further progress has been made on translating the website.

## SharePoint

A CUEE SharePoint was established in October 2010, however, it is no longer in use.

## Projects

The following projects have been a major focus of the CUEE Secretariat and CUEE members:

Past projects:

- **CEE Competency Profile Cross-walk Project** was a major activity from March 2011 to March 2012. CUEE members assessed the degree of overlap between the content of their graduate-level evaluation courses and credential programs and the TBS/CEE Competency Profile for Federal Public Service Evaluation Professionals (draft, January 2010).
- **CES Competencies Cross Walk Project** was also undertaken in March 2011 to March 2012. CUEE members assessed the extent of coverage of the CES Competencies for Canadian Evaluation Practice (April, 2010) in their courses and credential programs.
- **Canadian Evaluation Society Education Fund (CESEF) Financial and Practice Placement Needs Assessment Survey** was undertaken from March 2012 to September 2012. CUEE members provided their perspectives on the need for financial support for students enrolled in graduate-level evaluation courses of credential programs and the need for assistance in locating practice placements, such as co-ops, internships and mentorships.

Current projects:

- The **Student Accessibility Project** is intended to increase opportunities for students in courses and programs of CUEE members to access graduate courses at other CUEE institutions.

This project is an opportunity to work across institutions to identify the institutional structures, rules and procedures regarding course transfers for both “domestic” students and for “visiting” students from other CUEE member programs.

In addition, the project will identify the evaluation courses available (over the next two years), when they will be offered, whether they will be offered face-to-face, online or as hybrid courses, and the number of spaces available for visiting students.

A table of equivalencies among CUEE members’ courses is being developed so that from a student perspective, it will be possible to know which courses being offered in CUEE-related programs are equivalent to which courses in their domestic programs.

The CUEE Secretariat will maintain an up-to-date list of the courses being taught among CUEE member programs, their capacities for accepting visiting students and the procedures that need to be followed to secure permission(s) to take those courses.

Information regarding transfer rules and procedures, as well as courses available for transfer will be posted on the CUEE website.

- **TBS/CEE Professional Development Project**

CUEE is assisting the federal government with meeting their training needs. After two initial presentations on behalf of CUEE by Rob Shepherd and Jim McDavid , Rob Shepherd (Carleton) and Isabelle Bourgeois (ÉNAP) have been leading this project and have met several times with the Treasury Board Secretariat/Centre of Excellence for Evaluation regarding the training needs of federal evaluators. They presented an initial proposal to develop and deliver training to Heads of Evaluation on October 11, 2012. Rob and Isabelle have met regularly with a subcommittee of 5-6 representatives of large departments, including the Canada School of Public Service (CSPS), to determine the content and the timing of this training.

TBS would like baseline training across federal government departments and agencies. An initial 10-day training program targeted at the upper introductory/lower intermediate level will cover off the basic competencies that evaluators need to work in the field. This training can be applied to the Credentialed Evaluator designation, along with experience and formal education.

## **Financial Management and Accountability**

The CUEE Secretariat is responsible for receiving, maintaining, dispersing and accounting for CUEE finances and is accountable to the Consortium Council regarding CUEE finances.

The annual budget is developed by the Consortium Council co-chairs and submitted to the Consortium Council for approval in October of each year. The CUEE fiscal year coincides with the academic fiscal year and runs from the beginning of September to the end of August.

No membership fees were charged for fiscal year 2012-2013 because CUEE had a surplus from earlier contributions. Membership fees will be reassessed in September 2013.

Financial reports for fiscal years 2012-2013 and 2011-2012 are included below. Reports for previous years including 2008-2009, 2009-2010, and 2010-11 and the TBS / Centre of Excellence for Evaluation Competencies Cross-walk Project are available upon request.

**Financial Report – Fiscal Year 2012-2013**

**Financial Report – Fiscal Year 2011-2012**

## **Tentative Plans for 2013-2014**

The 2013-2014 fiscal year is shaping up to be a very busy year for the CUEE. First on the list of things to do is the development of a new strategic plan. The first strategic plan created in 2008-2009 was modest in the sense that the CUEE was creating the institutional arrangements for membership. Not unexpectedly, the CUEE has moved considerably from this position, and is now actively engaging in projects spread across the three major program areas: supporting academic programs; supporting professional development and training; supporting sound evaluation research.

With respect to supporting academic programs, work on the Student Accessibility Project continues. This is an important incremental step that identifies willing programs that can be accessed by students across the country by member institutions and programs. Our ultimate goal is to build a truly national graduate program in evaluation that accesses the best of our teachers, research and resources. Clearly, our next strategic plan will provide greater detail on the steps yet to be taken, who will carry these out, over a clearly spelled out timeframe.

Members have also expressed the desire to build a mechanism that allows programs to tap into advice and resources on curriculum development, or other program support that can be used to create or amend existing evaluation degree programs. This is an area that needs some attention, and it is clear that it falls well within the activities the Consortium might become involved.

Regarding supporting professional development, some CUEE members have established a working relationship with the federal Treasury Board Secretariat to create a national introductory training program for federal evaluators. This effort has been ongoing for much of 2012-2013, but continues with greater emphasis on curriculum and program development in the current year.

It is anticipated that more work in this area will be considered in the future with willing members. It has been expressed by a number of provincial and territorial jurisdictions that there is a growing demand for evaluation, and that they regard the CUEE as a sound starting point for program development. As demand increases in this area, it is anticipated that more careful strategic planning will be needed to address these requests for assistance.

With respect to the final program area, supporting sound evaluation research, there is a wide consensus among members that evaluation research be coordinated centrally that draws on available academics working in this research area. The idea is to build a repository of Canadian, and perhaps international, research in several areas of evaluation, and to create a directory of people working in evaluation who would be interested to share their time and energy on various research or professional projects. A discussion for the near future is the kind of model to embrace for this purpose, but there are some available resources that can be accessed at little cost, including Public Policy and Governance Portal (PPG Portal) operating out of the University of Toronto.

The CUEE is also engaging in a number of partnering arrangements that could become a regular part of the CUEE program. First, the Canadian Evaluation Society has accepted the idea that the CUEE provide

an outlet for students to present their research and projects at the annual CES conference. In 2014, members of the CUEE will be adjudicating applications from students to present their work. We believe this is well within the responsibilities of the CUEE as it supports member programs and their students.

In addition, the CUEE has been asked to prepare a panel of speakers for the CES annual conference taking place in June 2014, in Ottawa. Again, CUEE members have accepted to do this, and it could become an annual event.

As part of its long term vision, the CUEE may be in a position to host its own academic conference in Canadian evaluation research. There are models where the CUEE may be able to draw its inspiration for this idea including the annual CAPP (Canadian Association of Programs in Public Administration) conference. Under this model, only member academic institutional faculty and students (PhD only) may present, meaning that it is forum reserved for academics to speak among themselves for a short period. Clearly, this does not preclude researchers from engaging with other practitioner communities, but it is intended to provide a rigorous forum to review academic research in our field.

As indicated earlier, the CUEE has come a long way, and is moving ahead to support building a stronger evaluation field. It has its sights set on big ideas (a national graduate program in evaluation, a national research centre, a national and coordinated approach to professional training in evaluation), but with the right mix of programs, institutions and people, we believe the sky is truly the limit.