



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

ANNUAL REPORT

2013-2014

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The CUEE Secretariat
School of Public Administration
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We are pleased to present the second Annual Report for the Consortium of Universities for Evaluation Education (CUEE) for the 2013-2014 fiscal year.

This fiscal year was filled with much activity. The Consortium met fairly regularly every two months or so to discuss several ongoing projects. That said, the CUEE was still in a building mode, negotiating its vision and purpose. As opportunities for engagement arose, members were asked to consider whether it wished to move in certain directions or not. A key example of this was professional development. Other actors in the field of evaluation, including the Centre for Excellence in Evaluation at the Treasury Board Secretariat, and a few provincial/territorial agencies have turned to the CUEE for assistance in training their staff. Members struggled with these requests, and continue to do. In our view, these opportunities would aid us in remaining relevant in our field, and others regard us as having a significant role to play.

In addition, the CUEE has remained committed to three major program areas. First, members remain focused on strengthening existing academic programs at the graduate level. The Student Accessibility Project is at the centre of this program area, and efforts toward building common competency-based training across member institutions continue. It would be fair to say that the CUEE is still building the vehicles that allows for cooperation in this area, but there is a strong willingness to continue the effort. Ideally, members would have access to common course materials or other supports to bolster their own programs. In addition, finding ways to enable students to access multiple programs while registered in a home institution is the primary goal of this program.

Second, the CUEE has committed itself to some common professional development training as a key contribution to improving the Canadian evaluation community as a body of practitioners. This year, efforts continued to building a training program for federal evaluators. This has been a long process, but the CUEE wishes to remain engaged in this effort. Federal evaluators continue to be an important target group for CUEE training activities. However, this year the GNWT has approached the CUEE to build a certificate program. The University of Victoria and Carleton University have been taking the lead role in building this program, with the hopes of welcoming the first cohort of students in January 2015. Other provinces have also expressed an interest in this sort of arrangement.

Finally, members have expressed a sound interest in supporting cutting-edge research on evaluation. At present, informal links have been created among members to support sound research projects. It is hoped that some of these arrangements will be formalized in the coming year.

This year, our membership has increased and we hope to see a few more join our ranks in this exciting venture. Ours is a very collegial group of faculty each working in their own ways to strengthen our field.

Finally, it is with sadness that we, as co-chairs, are at the end of our terms. This does not mean we will be disengaged from the CUEE – it just means our roles will change a bit. We wish the next executive all the best for the next two years. There is much to do, and we will still be around to participate!

Karen Lawson

Karen Lawson, Co-Chair

Robert P. Shepherd

Robert P. Shepherd, Co-Chair

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CONSORTIUM OF UNIVERSITIES FOR EVALUATION EDUCATION (CUEE) ANNUAL REPORT FALL 2014

BACKGROUND

The Consortium of Universities for Evaluation Education (CUEE) is a collaborative partnership among universities, government and the Canadian Evaluation Society for the purpose of building capacity in graduate-level education and training in Canada. CUEE is a voluntary association of institutions and programs dedicated to expanding graduate level opportunities for evaluation education and training across Canada. CUEE was created in 2008 as part of a multi-organizational strategy to increase opportunities for current and prospective evaluation professionals to acquire the knowledge and skills required to become evaluation practitioners. The Canadian Evaluation Society implemented the Credentialed Evaluator designation in 2010, which includes a requirement for education and training that can be satisfied by successfully completing a graduate-level credential in evaluation.

Le Consortium des universités pour l'enseignement de l'évaluation (CUEE) est le fruit d'une collaboration entre les universités, le gouvernement et la Société canadienne d'évaluation qui a pour but de renforcer, dans le cadre de programmes universitaires offerts au Canada, les capacités professionnelles dans le domaine de l'évaluation. Cette association bénévole d'institutions et de directions de programmes se consacre à accroître les possibilités d'études supérieures et de formation au Canada dans le domaine de l'évaluation. Créé en 2008, le Consortium découle d'une stratégie multi-organisationnelle visant à accroître les possibilités d'emploi des professionnels de l'évaluation actuels et potentiels en leur permettant d'acquérir les connaissances et les compétences liées à l'exercice de leur profession. En 2010 la Société canadienne d'évaluation a mis en place un programme d'évaluation des titres aux termes duquel la désignation d'évaluateur accrédité est assortie d'une exigence de scolarité et de formation qui peut être satisfaite en obtenant un diplôme universitaire en évaluation.

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 been co-chairs of 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 Theresa Hunter (PhDc).

MEMBERSHIP

The CUEE members include Canadian chartered universities with an interest in developing and offering graduate-level evaluation-related courses and credentials. The Canadian Evaluation Society is an *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 2013-2014, CUEE had the following members:

- Carleton University, School of Public Policy and Administration, Faculty of Public Affairs
- Dalhousie University, School of Public Administration, Faculty of Management
- École nationale d'administration publique (ÉNAP)
- Memorial University, Department of Psychology, Faculty of Science
- Royal Roads University, School of Leadership Studies
- University of Alberta, Centre for Research in Applied Measurement, and Evaluation and Learning Solutions, Faculty of Extension
- Université Laval, Département de médecine sociale et preventive, Faculté de médecine
- University of Ottawa, Faculty of Education and Psychology Department, Faculty of Social Sciences
- Université du Québec à Montréal, Département d'éducation et pédagogie
- University of Saskatchewan, Applied Social Psychology, Department of Psychology

- University of Victoria, School of Public Administration, Faculty of Human and Social Development
- University of Waterloo, School of Public Health and Health Systems, Faculty of Applied Health Sciences
- Canadian Evaluation Society (ex officio)

MEETINGS

The following Meetings were held during the 2013-2014 fiscal year:

- October 23, 2013 (teleconference) – summary notes distributed
- February 6 2013 (teleconference) – summary notes distributed
- May 15, 2014 (teleconference) – summary notes distributed
- June 16, 2014 (in-person in Ottawa) – summary notes distributed

WEBSITE

The CUEE launched a website 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. This inventory is updated annually with the input of members.

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

PROJECTS

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

Professional Development

i. Treasury Board Secretariat of Canada (TBS) Training for Federal Evaluators

CUEE is participating with the Centre for Excellence in Evaluation (CEE) at Treasury Board Secretariat to build a two-week training program at the introductory/intermediate level. The leads on this project, Robert Shepherd (Carleton), and Isabelle Bourgeois (ÉNAP) created a proposal in 2013 for this program, which received unanimous support from the sub-committee on training working under the auspices of the Heads of Evaluation of federal departments and agencies, and at a gathering of all Heads of Evaluation in October 2013. To date, this project remains a high priority for the CEE and the

CUEE, and efforts are underway to garner support with the Canadian Evaluation Society (CES) to make this program a reality. With agreement on a core curriculum tied to the CES competency profile and CE-designation, the issues to be resolved at this point remain financial, and the political will to move this forward.

ii. Government of the Northwest Territories (GNWT) Certificate in Evaluation

The University of Victoria (Jim McDavid), and Carleton University (Robert Shepherd) have taken the lead on building a new evaluation certificate tailored to the needs of the Government of the Northwest Territories. It is a four-course, one-year program that will begin accepting applications in September 2014. Courses will commence in January 2015. We are expecting approximately 25-30 students in the first year. Participants in the certificate will be expected to work on actual evaluation projects as a key assessment of their final grades. Students will receive a joint certificate from both universities. The program runs from January 2015 to December 2015.

Student Accessibility Project

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 has been 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.

CUEE/CES/PPX Conference Partnerships

As indicated in last year's annual report, efforts were made this year to strengthen student research ties with the Canadian Evaluation Society, and the Performance and Planning Exchange (PPX). Students in member programs were invited this year to submit their research papers to the CUEE to be considered for presentation at both the PPX Symposium held in May, and the CES annual conference held in June. The PPX was generous to offer student bursaries in the amount of \$6,000/year for the next three years to support student research, and to defray the costs of conference fees and travel arrangements. Nine students participated in the PPX symposium.

In addition, the CES kindly sponsored students to attend the conference as participants, and other students to present the results of their research. In this respect, the CUEE and CES created a "student stream" for research whereby papers were adjudicated by a committee of faculty from CUEE member institutions and acted as discussants at the conference. A total of twelve papers were delivered at the conference, and the sessions were well-attended by regular CES members. We hope to continue this effort for the next CES conference to be held in Montreal in June 2015. In addition, students will be invited to participate in a student panel of papers at the next PPX symposium to be held in May of 2015.

As part of each of these conferences, the CUEE developed new marketing materials, and supported each of the conferences with sponsorships.

CUEE involvement in the CES 2014 Conference

i. Student Panel Presentations

CUEE sponsored the student panel presentations stream at the CES 2014 Conference.

- CUEE assisted with drafting the Call for Student Papers and Panels;
- An Adjudication Committee of four members was struck to review and select student papers for the panel presentations; The Adjudication Committee:
 - Created eligibility criteria that would guide the call for papers.
 - Created adjudication criteria that would guide the selection process for both papers and student panels.

- Liaised with the CES Organizing Committee on the number of student paper spaces and panel timeslots available.
- Assisted the CES Organizing Committee on all matters related to the logistics surrounding the selection, notifications, and scheduling of student papers and panels.
- Selected full-time faculty from member institutions who would be responsible for providing feedback on individual student papers and panels.
- CUEE members acted as chairs / discussants during the student panel presentations at the CES Conference.

ii. Thematic Breakfast

CUEE hosted a thematic breakfast on "Current issues in university education in evaluation." Hosts:

- Marthe Hurteau , Département d'éducation et pédagogie , Université du Québec à Montréal
- Karen Lawson, Department of Psychology, University of Saskatchewan
- Anita Myers, School of Public Health and Health Systems, University of Waterloo
- Rob Shepherd, School of Public Policy and Administration, Carleton University
- Jim McDavid , School of Public Administration, University of Victoria

Issues discussed at the thematic breakfast included:

- connecting teaching graduate students to institutional (university) reach in the evaluation field;
- professionalizing evaluation in Canada;
- pedagogy (on campus, hybrid and online), new developments, and the intersection of credit and non-credit teaching; and
- ways that institutions can and do collaborate on evaluation teaching-related initiatives.

iii. Roundtable on Teaching and Learning

For the first time this year, the CUEE met as individual faculty members to discuss advancements in teaching evaluation following the annual CES conference in June. The University of Ottawa under the kind sponsorship of Dr. Brad Cousins, hosted the event and heard presentations from Dr. Jim McDavid, Dr. Robert Shepherd, and Dr. Brad Cousins. There were approximately 20 attendees all interested in ways to improve graduate training and pedagogical techniques.

iv. CUEE Exhibitor Table.

CUEE hosted an exhibitor table at the CES 2014 conference. A CUEE banner and brochure were created for this even and members were invited to bring their program brochures to display at the table. Members volunteered at the table during breaks and lunches to discuss CUEE and their programs with delegates.

v. CUEE Sponsorship

CUEE made a sponsorship contribution of \$1,000 to the CES 2014 conference.

Government Executive Magazine

CUEE Members agreed to contribute six articles to the Government Executive Magazine in 2014. Topics ranged from those of interest to the Consortium and other areas of interest to members, such as collaborative processes. The following articles were published or have been submitted:

October 2014 (TBA). "Coordinating program evaluation training has never been more necessary" by Robert P. Shepherd.

June 26, 2014, Vol 20(6). "Have we built a system that contains a paradox?" by Jim McDavid.

April 30, 2014, Vol 20(4). "Increasing opportunities for evaluation education" by James McDavid and Theresa Hunter.

February 19, 2014, Vol 20(2). "Purposeful performance stories or pointless propaganda?" by Robert P. Shepherd.

October 31, 2013, Vol 19(8). "Creating innovative approaches to teaching evaluation" by Robert P. Shepherd, Karen Lawson, James McDavid and Theresa Hunter.

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.

Membership fees were charged for fiscal year 2013-2014 in the amount of \$750 per institution. It is anticipated that membership fees for the next fiscal year will continue at this rate until such time that additional funds are needed from members.

Financial reports from previous fiscal years, including: 2008-2009, 2009-2010, 2010-11, 2011-2012, and 2012-2013 are available upon request.

FINANCIAL REPORT – FISCAL YEAR 2013-2014

TENTATIVE PLANS FOR 2014-2015

As this is the final year for Co-Chairs Robert Shepherd (Carleton), and Karen Lawson (University of Saskatchewan), it may be presumptuous on our parts to propose any plans for the next fiscal year. However, we can reiterate those plans that have been discussed in the past year, and which may need attention.

With respect to membership, there are still institutions that remain outside the “fold” as it were. However, some important additions to our ranks were made this past year, and others that can be added. We are pleased that St. Michael’s College (University of Toronto) under the capable hands of Dr. Sanjeev Sridharan will join the Consortium as a full member in the coming year. In addition to this important member, we are also seeking to strengthen existing memberships and attract new members.

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.

With respect to our work supporting professional development, several new opportunities have emerged in the past year. As a consortium, it will be incumbent on us to determine whether these are projects in which we wish to engage, or whether we wish to focus our efforts purely on academic programming. Issues of resources, load, and ongoing maintenance have to be considered especially as faculty are already over-taxed in their own programs. We know that there is a growing demand in this area, and as academics we should remain engaged at least at the level of curriculum development.

With respect to the final program area, supporting sound research on evaluation, there is a wide consensus among members that research on evaluation be coordinated centrally, drawing 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. Discussions continue in this area, and it is a discussion that will be picked up again this year.

The CUEE is also engaging in a number of partnering arrangements that could become a regular part of the CUEE program. This year, we are pleased to welcome Dr. Gail Barrington as the CES National Board Liaison to our board. We look forward to working with her to create stronger links with the CES national executive and to coordinate our programming efforts. In addition to Dr. Barrington’s work, we are looking forward to building stronger links with the Canadian Evaluation Society Education Fund (CESEF), so that there might be greater collaboration supporting student research efforts.

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 we are that much closer to realizing our goals.