Examining the Impact of Evaluation Professionalization in Canada on the Positioning, Practice,

and Employability of Evaluators

Krista Brower

This thesis is submitted in partial fulfilment of the requirements for the degree of Doctor

of Philosophy

Department of Educational Research

Lancaster University

UK

Abstract

This thesis presents an exploration of the impact of evaluation professionalization through credentialization, with a particular focus on the Canadian context, where the Canadian Evaluation Society (CES) has pioneered the Professional Designation Program (PDP) incorporating the 'CE' designation. Employing a mixed, multi-methods approach, this study sought to address research questions concerning the positioning, practice and employability of evaluators. The overarching research question examined the effects of evaluation professionalization in Canada, while sub-research questions compared the Canadian model to international counterparts, delved into the experiences of 'CE' designated evaluators, and drew insights from the application of a credential for evaluation in the Canadian context. Research findings revealed multifaceted impacts, highlighting that evaluation is a social construct affecting professionalization, identifying barriers to qualification-based approaches, and emphasizing the multidimensionality of professionalization's impact in Canada. The study's outcomes contribute valuable insights to the field of evaluation professionalization, providing guidance for practitioners, policymakers, and professional associations in Canada and globally. Ultimately, this research advances our understanding of the complexities surrounding evaluation professionalization and seeks to bolster the evaluation profession's development on a broader scale.

Keywords: Evaluation professionalization, credentialization, Canadian Evaluation Society, CE designation

"I could tell you my adventures - beginning from this morning," said Alice a little

timidly: *"but it's no use going back to yesterday, because I was a different person then."*

- Lewis Carroll, Alice in Wonderland

To the relentless seekers of knowledge, who fear no obstacle and let no boundary hinder their

pursuit of excellence.

Acknowledgments

Gratitude fills every word as I extend my heartfelt acknowledgment to the Canadian Evaluation Society for their generosity in supporting this research endeavor. Their commitment to fostering excellence in evaluation has been instrumental in shaping and enriching this study. I am thankful to both Canadian and international evaluators whose invaluable contributions and insightful perspectives have illuminated this research. Your willingness to share expertise, experiences, and perspectives has been pivotal, infusing this work with depth and diversity.

Special gratitude extends to Professor Murray Saunders, whose profound understanding of evaluative practice and the international landscape has been an invaluable contribution to this work. His extensive knowledge, guidance, and mentorship have been instrumental in shaping the trajectory of this research.

I would also like to express my deepest appreciation to my evaluation community - the mentors and knowledge givers I have had the privilege of connecting with. Your wisdom, guidance, and support have been indispensable throughout this journey, enriching my understanding and shaping the direction of this research.

Lastly, to my family and friends who are my pillars of support, I extend my heartfelt thanks. Despite being often kept in the dark about the intricacies of this endeavor, your fervent encouragement and understanding have been a constant source of strength. Your belief in me has carried me through the challenges and uncertainties, and for that, I am eternally grateful.

Author's Declaration

This thesis is the author's own work and has not been submitted in substantially the same form for the award of a higher degree elsewhere.

Table of Contents

Chapter 1: Introduction

To professionalize or not to professionalize – that is one of the central questions facing individuals who are seeking to designate their practice by the term "professional". This question is of great importance for those engaged in evaluative practice, including practitioners, commissioners, and users of evaluations. The discussion surrounding evaluative practice has long revolved around the extent to which it can be considered a "profession" and the implications of this classification. Those involved in evaluative practice have debated the extent to which they are working in what might be called "a profession" and what this might mean. Evaluation practitioners have established associations and societies on a global scale, striving to identify the unique attributes of evaluation practice and theory that distinguish it from other fields.

As evaluators and their professional associations worldwide take various approaches toward professionalization, it becomes evident that the concept of professionalization can take on multifaceted forms, each resonating differently with individual evaluation practitioners. This variance in interpretation is not merely limited to the overarching definition of professionalization, but also extends to the specific components that contribute to its manifestation. For some, professionalization might encompass the establishment of well-defined boundaries that demarcate the practices associated with evaluation, offering a distinct professional identity. For others, the pursuit of professionalization might extend even further, involving the creation of comprehensive credentialing or licensing mechanisms as a tangible expression of the endeavor to solidify evaluation as a recognized and respected profession. The fluidity and adaptability of the concept means that it can embody diverse meanings, which are shaped by the cultural, contextual, and personal backgrounds of practitioners. This dynamic

interplay between personal interpretation and broader societal constructs underscores the need

for a comprehensive investigation into the nuanced dimensions of professionalization in the field

of evaluation.

Context for Inquiry

There are several dozen known professional associations for evaluators that operate at

the regional, national, or international levels. The number of evaluation associations is

continually evolving, making an exact count elusive. These associations vary in terms of their

size, focus and scope, with some focusing on specific areas of evaluation practice or types of

evaluations, and others serving as umbrella organizations for multiple sub-fields or regions. For

example, the Canadian Evaluation Society (CES) is a national organization, with 11 regional

(provincial) chapters – which means there are 12 societies that exist within one country, in

addition to other evaluation-related entities and communities of practice. Literature (e.g.,

International Organization for Cooperation in Evaluation, 2022) suggests that there are over 159

professional associations for evaluators globally, with many having crafted frameworks of

competencies and skills to delineate the unique demands of the practice. However, many have

hesitated to take the step of certifying or licensing these competencies.

The discourse on adopting licensing, credentialing, or certification within the realm of

evaluative practice has engendered considerable debate among evaluation professionals,

associations, and academics over the years (e.g., Castro, Fragapane & Rinaldi, 2016;

International Organization for Cooperation in Evaluation, 2023; Jacob & Boisvert, 2010;

Quesnel, 2010). Departing from conventional practices, the CES has introduced a distinct

approach to professionalization by instituting the professional designation of Credentialed

Evaluator (CE), with the goal of fostering ethical, high-quality, and proficient evaluation

(Canadian Evaluation Society, 2023a). Given the ongoing international deliberations on professionalization and qualifications, as well as the distinctive Canadian approach, an in-depth exploration of the enactment of evaluation professionalization emerged as a compelling pursuit.

My interest in understanding the drive to designate evaluative practice as a profession by evaluators stems from my personal experience as an evaluation practitioner. My motivation for delving into the subject of evaluation professionalization originates from my role within the field. Having secured the CE professional designation through the CES (Canadian Evaluation Society, 2021b) and having actively engaged with the CES professional association for over a decade, I've not only observed but also actively contributed to the organization's initiatives aimed at elevating and professionalizing the evaluation domain in Canada and on a global scale (Canadian Evaluation Society, 2021b). My positions on the organization's board of directors have granted me unique insights into their endeavors.

As a Canadian evaluator, I have observed the gradual institutionalization of evaluation within the Canadian context, influenced by the federal government's development o results-based management (Gauthier, Lahey & Jacob, 2022). This recognition underscores the importance placed on evaluation expertise in informing decision-making processes at the federal level. However, it is essential to recognize that this institutionalization is not as pervasive as observers outside Canada might assume. While federal support is significant, evaluation requirements are not mandated in the same way at the provincial level, where the bulk of funding and responsibility lies for crucial sectors such as healthcare, social services, and other programs requiring evaluation. This highlights a disparity in the institutionalization of evaluation across different levels of governance within Canada, posing challenges for achieving consistency and

accountability in evaluation practices nationwide as well as influencing the professionalization of the evaluation field itself.

As a dedicated evaluator, I've keenly observed the divergent paths taken by different countries in approaching professionalization, along with the ongoing worldwide discourse on this subject (e.g., Picciotto, 2011; Jacob & Boisvert, 2010). My curiosity deepened as I encountered a wealth of grey literature, association positions, and scholarly viewpoints addressing the intricacies of evaluation professionalization and the broader context of professions and professionalization. While the literature is replete with diverse statements and perspectives, empirical studies on evaluation professionalization remain scarce, often relying on anecdotal evidence as the basis for their claims or looking to other professional contexts.

This gap in the literature prompted me to focus on comprehending the Canadian journey of evaluation professionalization, particularly the impact of professionalization through credentialing. The present study embarks on a progressive focusing process, sequentially exploring the concepts of "professional" and professionalism, followed by an investigation into the pursuit of professional status within the evaluation field. This progression culminates in an examination of core competencies associated with evaluation and a specific case study centered on the credentialing of these competencies. It is important to acknowledge that terms like "professional", "professionalization", and "credentialism" are socially constructed concepts shaped by individuals' perceptions, beliefs, and prescriptions. The study pivots on understanding these attributed meanings. Delving into the concept of "evaluation professionalization" might have presented challenges had the research not been strategically positioned to scrutinize its practical implementation. This study focused on unraveling individuals' perceptions of the

meaning behind evaluation professionalization as a concept and subsequently examining the

tangible manifestations of professionalization through specific enactments in evaluation practice.

Understanding the Research Focus

The current research investigated the nuances around what people understand by

professionalization through a step-by-step process of progressive focusing: first by examining

the concept of "professional" and embodying professionalism. This then led to the exploration of

the evaluation field's quest for professional status, which has resulted in the establishing of core

competencies associated with the evaluation field. Finally, investigating a specific case study

focused on the enactment of professionalization in Canada, focused on the credentialing of

distinct evaluation competencies which create a boundary around evaluative activities to affirm

them as a domain of "professional practice". The research dilemma focuses on the construction

of "professional", "professionalization" and "credentialism" as socially constructed concepts

which point to perceptions, beliefs, and prescriptions rather than essentialist phenomena. In other

words, it is people who attribute meaning to these specific types of activities and it is these

meanings that form the focus for this thesis. The progressive focusing of the research is

presented in Figure 1.

Figure 1. *Visual Demonstrating the Progressive Focusing of the Research*

In the realm of academic inquiry, the contours of various concepts often appear defined, their boundaries established with a degree of certainty that lends an air of permanence. However, a closer examination of terms like "evaluation profession," "professional," and "professionalism" reveals a complex interplay between language, context, and perception. These notions, rather than being fixed, objective constructs, are instead dynamic and socially constructed, their definitions molded by the fluid perspectives of individuals and societies. This thesis embarks on a journey to unravel the intricacies of this constructivist perspective, particularly focusing on how the concept of evaluation is interwoven with the ever-shifting conceptions of professionalism.

In the academic discourse surrounding what constitutes a "profession" and the attributes that define a "professional," scholars have grappled with an ongoing process of conceptual construction (e.g., Wilensky, 1964). The notion of a profession, while seemingly straightforward,

is far from monolithic; it is a term laden with societal, cultural, and historical nuances that evolve over time. While there have been concerted efforts to establish definitive traits through theories like the trait theory of professionalism (e.g., Lawman, 2021), these efforts remain part of a broader endeavor to create a unified and agreed-upon understanding of what it means to be a professional. This thesis delves into the heart of this ongoing construction, aiming to provide a nuanced understanding of how the socially attributed traits and meanings of professionalism shape the contours of evaluation practices within various contexts.

It is crucial to emphasize that the terms "profession," "professionalization," and "professional," as used throughout this thesis, refer explicitly to the socially constructed notions that individuals and societies bestow with attributes and meaning. Each instance of these terms underscores their fluidity, highlighting that they are not fixed entities but rather malleable constructs subject to interpretation. The inherent subjectivity in these terms necessitates an exploration of their contextual significance and the implications this subjectivity carries for evaluation processes.

As the following chapters unfold, this thesis seeks to illuminate the intricate relationship between the construction of professional identities and the evaluative frameworks employed within them. By delving into the interplay of societal perceptions, individual values, and cultural expectations, a more comprehensive picture emerges of how the concept of evaluation is entwined with the socially negotiated definitions of professionalism. In doing so, this research contributes to the ongoing discourse surrounding these constructs, enriching our understanding of how they shape and are shaped by the world in which they exist.

Research Purpose and Approach

While discussions on professionalization within the evaluation context have sparked numerous white papers and debates, empirical research delving into the impact of "professional", "professionalization", and "credentialing" on evaluative practice remains scarce. Existing literature has largely remained within the realm of abstract and theoretical debates. There is a pressing need for more research to inform the discourse and provide insights into the outcomes of what evaluators have termed professionalization as expressed through credentialing. Given the lack of empirical evidence to inform the debate and the varied approaches to professionalization that have been adopted internationally, it becomes interesting to examine the experience and impact of a credential for evaluation on the positioning of evaluation, the practice of evaluators and the employability of evaluators, that is built on the assumptions that evaluation is a profession both in traits (via competencies) and in construct. A particularly intriguing facet of this study is its focus on the unique Canadian perspective on professionalism, which contrasts approaches adopted in other jurisdictions. Exploring the impact of credentialing on evaluation in Canada, compared to other contexts, holds great research potential. This is especially pertinent considering the discourse surrounding the construct of evaluation as a profession and the diverse avenues of professionalization, globally.

The progressive focusing of the research provides insight into the evaluation profession by examining professionalization, professionalization through competencies and a specific case study of the enactment of evaluation professionalization through the credentialization of competencies. The utilization of progressive focusing as a methodological approach investigating various aspects of professionalization carries significant methodological implications. This approach involves a systematic progression from a broad overview to a more

targeted exploration, which inherently demands a comprehensive and multi-method examination. When studying the multifaceted concept of professionalization, especially in the context of competencies, employing a single research method may limit the depth and breadth of insights gained. To adequately capture the complexity of the subject, a combination of qualitative and quantitative methods becomes imperative.

Furthermore, given the diverse interpretations of the meaning of professionalization and its implications, engaging with a wide array of stakeholders from both Canadian and international contexts becomes methodologically important. This diverse perspective enables a multi meaning understanding of the subject, potentially enriching the research findings, and contributing to the robustness of the study. Conversations with evaluators from various backgrounds offer unique insights that collectively shape a comprehensive narrative of professionalization through competencies.

The field of evaluation has evolved significantly over the years, transforming from what some perceive as a niche practice to an essential component of various sectors. The emergence of professional evaluation organizations and the establishment of evaluation standards have played a role in shaping the discipline's evolution and understanding of professional status. The CES stands as a unique player in this landscape, offering the Professional Designation Program (PDP) with the "CE" designation. This program seeks to professionalize the practice of evaluation in Canada by providing evaluators with a standardized credential that reflects their expertise and adherence to standards (Canadian Evaluation Society, 2023a). This research explores the effects of evaluation professionalization in Canada as enacted through the CES' PDP and its "CE" designation, focusing on its impact on the positioning, practice, and the employability of evaluators, as perceived and experienced by evaluators. It should be noted the research does not

thoroughly explore the institutionalization of evaluation within the Canadian context as the main focus was on the definitions and experiences applied by the evaluation practitioners.

Research Questions

At the core of this study lies the primary research question, outlined here, and discussed in more detail in the methodology section: *What has been the impact of evaluation professionalization in Canada as enacted through the PDP (CE designation) offered by the Canadian Evaluation Society on the positioning, practice, and employability of evaluators?* To dissect the multifaceted nature of the main research question, several sub-questions have been formulated:

How does the CES' Professional Designation Program compare to international models or positions on evaluation professionalization? By examining the CES' approach alongside other global evaluation organizations, insights can be gleaned into the effectiveness and uniqueness of the Canadian program. *What can be learned about the effects of enacting an idea of professionalization from the experience of other international evaluation associations and their positions on evaluation professionalization?* By studying the practices of other evaluation bodies, valuable insights can be obtained regarding the potential benefits, challenges, and outcomes of professionalization efforts. *What is the experience of CEs in obtaining the designation? In practicing with the designation? How has the CE impacted evaluators' practices in Canada and their employability*? By examining the perspectives of designated evaluators, a deeper understanding of the program's impact on professional development and practices can be gained. *What can be learned from the application of a credential for evaluation in Canada?* By analyzing the presence and process for attaining the "CE" designation, valuable information can

be obtained regarding the challenges and advantages of implementing a standardized evaluation credential.

To address the research questions outlined above, this study adopts a mixed methods research approach, drawing on various data sources. Chapter 3 will provide a detailed exposition of the chosen methodology, highlighting its alignment with the research objectives. In tandem with the methodological approach and engagement of diverse stakeholders, the design of data collection tools assumes paramount importance. The progressive focusing methodology necessitates the development of data collection instruments that effectively elicit participant experiences and opinions, allowing for a nuanced exploration of the issues at hand. These tools have been thoughtfully designed to facilitate a gradual narrowing of the research focus while still capturing the depth of individual perspectives. By incorporating open-ended questions, surveys, literature review and interviews, I have ensured the data collection process aligns with the progressive focusing approach and effectively addresses the research objectives.

Through an exploration of the impact of enacting a particular version of evaluation professionalization in Canada, this thesis aims to contribute to a more comprehensive understanding of how standardized credentials, such as the "CE" designation, influence the positioning, practices, and employability of evaluators within the Canadian context. By addressing the primary research question and its associated sub-questions, this study seeks to provide insights that can shape the future trajectory of the evaluation profession in Canada and beyond.

This research is structured into distinct chapters that systematically present its findings. Subsequent chapters will delve into a literature review that establishes the theoretical foundations and situates the study within existing scholarship. The methodology chapter will expound upon

the employed research methods and rationale, highlighting the significance of the progressive

focusing approach. The findings chapter will present the culmination of insights drawn from

diverse stakeholders and methods, shedding light on the intricate interplay between

professionalization, competencies, and enactment of a specific form of evaluation

professionalization - credentialization. The ensuing discussion chapter will critically analyze and

interpret the findings. Finally, the conclusion chapter will synthesize the study's contributions,

delving into their implications for the field and potentially uncovering avenues for future

research and reiterating its significance in the broader context of professionalization studies. The

research aims to offer an exploration of professionalization, supported by methodological rigor

and enriched by the varied perspectives of stakeholders from diverse geographical and

professional backgrounds.

This research bears substantial significance for a multitude of stakeholders within the

evaluation community, encompassing practitioners, policymakers, and academic researchers

alike. The findings of this study can inform evaluation professionals about the potential benefits

and challenges of pursuing a specific form of professionalization through credentialing

programs, drawing upon the lessons learned from the Canadian experience in enacting evaluation

professionalization through primary research. This intercontinental perspective enriches our

understanding of best practices and offers practical insights that can be applied in diverse

contexts. Policymakers stand to derive invaluable insights into the far-reaching consequences of

evaluation professionalization on the efficacy of decision-making processes. Moreover, this

research aims to enhance the sharing of information across international boundaries to inform

other evaluation communities' quests for enacting professionalization within the evaluation field.

By facilitating knowledge exchange and cross-cultural learning, this study contributes to a global conversation on the idea and enactment of evaluation professionalization. Practitioners, policymakers, and academic researchers worldwide can benefit from the wealth of insights generated, fostering collaboration and innovation in evaluation practices, and furthering the mission of elevating the quality of programs and policies across borders. Lastly, academic researchers can harness the knowledge generated by this study as a foundation upon which to propel the dialogue surrounding evaluation practices and their pivotal role in elevating the caliber of programs and policies.

Chapter 2: Literature Review and Context

The following section will outline the relevant literature related to understanding the evolution of professions, the notion of "professional" and ways to understand or define professions (e.g., trait theory), define the evaluation profession, discuss the enactment of professionalization of evaluation through competencies, and overview the Canadian history of and approach to evaluation professionalization as a case study. The progressive focusing of the research introduced in Chapter 1 will be mirrored in the literature review to provide context to describe the research gap and proposed study. The current research will investigate professionalization through a process of progressive focusing by examining the status of evaluation as a profession, the professionalization of the evaluation field through core competencies, and application to a specific case study (Canada) that represents credentialing of competencies.

The research explores the socially constructed nature of concepts like "evaluation," "professional," and "professionalism." It highlights that these terms are not fixed but shaped by dynamic perspectives of individuals and societies. The ongoing process of conceptual construction regarding professions and professionalism is explored, with a focus on theories like trait theory attempting to define, in an essentialist way, what constitutes a professional. The terms "profession," "professionalization," and "professional" are emphasized to refer to socially constructed notions, underscoring their fluidity and subjectivity. This chapter provides an overview of the evolving understanding of professions, tracing their historical and theoretical underpinnings. The notion of a profession has never been static; rather, it has evolved in response to changing societal, cultural, and economic contexts. Central to this evolution is the concept of professionalism, which encompasses the attributes and behaviors associated with

individuals engaged in professional roles. Literature in this domain acknowledges the ongoing negotiation and redefinition of these concepts. The chapter overviews the historical evolution of professions, theoretical perspectives on professions and the dynamic nature of professionalism.

Defining Professions, Evaluation as a Profession and "Being Professional"

The following section addresses the essential concepts that underpin the discourse on professionalization and the characterization of occupations as professions. Drawing upon relevant literature, this segment illuminates the intricate nature of the definition of a profession, discuss into the prescriptive framework of trait theory as a lens through which professional attributes are examined, analyze the ongoing dialogue surrounding the evaluation's potential status as a profession, and elucidate the nuanced concept of being professional within various occupational domains. Through this review, I aim to provide a comprehensive understanding of the multifaceted dimensions that shape conversation on professions, their traits, and the professionalization of various fields.

Evolution of the Concept of a Profession

The concept of a profession and the process of professionalization have been subjects of extensive research in the field of sociology since early scholars such as Carr-Saunders and Wilson (1933) and Parsons (1939) laid the foundation for understanding these notions. Erault (1994) highlights how a profession addresses the "social control of expertise," emphasizing the exchange of competence and integrity for societal trust, autonomy, and remuneration. However, criticisms emerged against dominant paradigms like functionalism and power, with scholars arguing that these paradigms overlook the evolving institutional context and the changes in professional activity (e.g., Brock, Powell & Hinings, 2007; Leicht and Fennell, 2008; Muzio, Brock & Suddaby, 2013). The professional dominance perspective, as elucidated by Wolinsky

(1988), provides a critical lens through which to examine the role and influence of professions within society. This perspective posits that certain professions, particularly those within the fields of medicine, law, and engineering, exert a significant degree of dominance over their respective domains. Professionals in these fields wield considerable power and authority, often due to their specialized knowledge, societal status, and regulatory mechanisms that protect their interests. Wolinsky's work (1988) highlights how professional dominance shapes not only the provision of services but also broader societal structures and power dynamics.

According to the professional dominance perspective, the influence of professions extends beyond mere expertise to encompass control over access to knowledge, resources, and decision-making processes (Wolinsky, 1988). This dominance can manifest in various forms, including the setting of standards and regulations, the establishment of professional bodies and licensing requirements, and the monopolization of certain services or practices. Moreover, professionals often enjoy privileged status and autonomy within their fields, which can result in the exclusion of alternative perspectives and the perpetuation of inequalities (e.g., Friedson, 1970). While the professional dominance perspective acknowledges the benefits that professions bring, such as ensuring quality standards and providing specialized services, it also underscores the potential risks of unchecked professional power and the need for greater accountability and democratization within professional spheres.

The question of what constitutes a profession, and its evolving nature, persists. The corporate organization's influence on professions, as outlined by Oppenheimer (1973), raised concerns about the erosion of professional autonomy. Contrary to the belief that professionalism and managerialism are mutually exclusive, some scholars contend that these logics can coexist, leading to various forms of professionalism (e.g., Goodrick and Reay, 2011; Muzio et al., 2013;

Pinnington & Morris, 2003). Despite ongoing debates, a challenge for various occupational

groups is meeting the criteria for professional recognition and acceptance.

Trait Theory – Profession to Professionalization and Defining Professions

Scholars have presented various theoretical frameworks to elucidate the nature of

professions and professionalism. Trait theory, for instance, attempts to distill the qualities that

characterize a professional. Such theories are often met with critique due to their simplification

of complex social constructs. Trait theory, prevalent during the 1950s and 1960s, aimed to

identify defining characteristics that differentiate professions from other occupations. Traits such

as knowledge and expertise were considered central, with scholars like Friedson (1970) and

Wilensky (1964) highlighting the importance of complex and esoteric knowledge. However, this

taxonomic approach encountered challenges due to the diverse nature of professions and the

evolving landscape, making a clear definition elusive.

The presence of a systematic body of knowledge within a profession, a common trait

identified by Greenwood (1957), has been debated. Some scholars question whether such

knowledge is manipulated to serve the practitioners" needs (Jamous & Peloille, 1970). Other

criteria proposed by researchers, like Reed (1996) and Nolin (2008), highlight factors such as

education, professional associations, and ongoing vocational training. The transition from trait

theory towards professionalism has shifted the focus to the process of professionalization but has

also led to a lack of consensus on a clear definition of a profession.

In recent times, the challenge lies in differentiating professions from non-professions in a

changing world. The dynamic relationship between specialized knowledge, authority,

relationships with clients, and professional associations underscores the complexity of defining a

profession (Lawman, 2021). As the boundaries between professions blur, the pursuit of a

definitive essence of a profession has become increasingly elusive, leaving researchers to navigate the evolving landscape of occupations and professionalism.

Defining professions involves the intricate task of characterizing occupational fields that possess distinct qualities and responsibilities, elevated standards of expertise, and a commitment to the ethical practice of specialized knowledge (Muzio & Kirkpatrick, 2011; Suddaby & Muzio, 2015). Trait theory, a lens often applied to the study of professions, illuminates the key characteristics and attributes that differentiate a profession from other vocations (Lawman, 2021). According to trait theory, a profession is not merely a job or vocation; it embodies a higher level of skill, knowledge, and societal importance. Professions often require rigorous education and training, leading to recognized qualifications and certifications that establish credibility and competence within a specific domain. A feature of definitions of professions is the emphasis on serving the public good, necessitating a dedication to ethical conduct, accountability, and the well-being of individuals or society at large.

The boundaries of a profession are often deemed to be demarcated by established codes of conduct, professional associations, and regulatory bodies that collectively shape and uphold the standards of practice. As the proponents of trait theory underscore and argue for inherent traits and attributes that distinguish professionals, the application of this prescription and aspiration involves a notion which is multifaceted, and which highlights the interconnectedness of expertise, ethical responsibility, and service as foundational elements of their definitional aspiration.

Trait theory, with its focus on these fundamental characteristics and the ethical dimensions of professions, can serve as a useful way to define and understand professional boundaries. By examining how various occupations align with these defining traits, researchers

can better navigate the evolving landscape of professionalism and contribute to a more nuanced

understanding of what it means to be a professional in our ever-changing world. This approach

not only helps us distinguish true professions but also fosters discussions on how different fields

can aspire to meet the high standards set by established professions, ultimately contributing to

the ongoing discourse on the nature of professionalism in contemporary society. In this research,

I adopt this approach and use of trait theory to interpret the findings to enhance understanding.

Evaluation as a Profession - The Debate and Context

The discourse surrounding the professionalization of evaluation has been a topic of

ongoing deliberation and is one way of responding to the escalating demand for evaluative

expertise in the assessment of public policies (Jacob & Boisvert, 2010). This dialogue has been

particularly pronounced in North America, where the practice of evaluation has flourished. Over

time, scholars such as Anderson and Ball (1978), Morell and Flaherty (1978), Merwin and

Weiner (1985), Worthen (1994), Jacob & Boisvert (2010), Gauthier and colleagues (2009) and

Schwandt (2017) have delved into the nuances of evaluation as a potential profession, with

discussions intensifying around the distinctive competencies and the gradual professionalization

of evaluators. Trait theory, a lens often applied to this analysis, has illuminated the

characteristics that differentiate evaluation as a specialized domain. By examining how various

occupations align with these defining traits, researchers can better navigate the evolving

landscape of professionalism and contribute to a more nuanced understanding of what it means

to be a professional in our ever-changing world.

The question of whether evaluation warrants full recognition as a distinct profession

remains unsettled. While some voices, like those of Jones and Worthen (1999), and Levin-

Rozalis and Shochot-Reich (2008), advocate for its classification as a "new" profession, others

emphasize the diversity in educational backgrounds and contexts of evaluation, challenging its

uniform categorization (King, 2012, as cited in Wilcox and King, 2014). These debates

underscore the importance of carefully defining the boundaries and attributes of evaluation as a

profession. In the realm of digital transformation and globalization, the conventional criteria used

to delineate professions are undergoing scrutiny (Castro et al., 2016). The proliferation of digital

communication technologies and practices has led to significant changes in the landscape of

professions, affecting established norms and boundaries. As the boundaries between online and

offline activities blur, the concept of a "professional community" takes on new dimensions,

fostering interactions that bridge traditional divisions (Castro et al., 2016). Social media's impact

on evaluation practices is evident in the introduction of novel tools and the transformation of

stakeholder expectations (Smith et al., 2011). Furthermore, the internationalization of evaluation,

facilitated by interconnected networks, is influencing the convergence of best practices and

perhaps weakening its boundaries (Picciotto, 2011).

Evaluation as a Profession, The Definition

In "well-established professions" such as law, psychology, or engineering, understanding

"what it means" to be a lawyer or other professional are well understood in society. These

professions are comprehended because we collectively have definitions and boundaries around

the professional identity, understand key foundational professional practices and the

competencies required to fulfill the role (Jacob & Boisvert, 2010). A person is likely to be able to

describe "what it means" to practice as a doctor, a teacher or a lawyer and would identify those

professional definitions, practices and competencies and use them with their experiences of

interacting with such professionals. Often individuals utilize trait theory, as discussed, the apply

the lens to their definition of profession (Nolin, 2008) In contrast, if you were to ask someone

about evaluation, fewer people would be able to describe the profession with such a frame of reference. This is because evaluation, as a profession, is fairly new in its conceptualization and is in the process of following more well-established professions" footsteps for development (Jacob & Boisvert, 2010). Part of those footsteps include ensuring that the evaluation profession contains elements of what a "profession" is.

In their working definition of "profession" Jacob and Boisvert (2010) note that a ""profession" means a field with a high degree of knowledge and/or skills based on education and/or training, membership in a professional organization with a high set of standards for admissions, dedication to public service above personal interest and a code of ethics" (Bourgault & Parent, 2008: 154). According to this trait definition, a "professional", then, is an individual with a high degree of knowledge or skill in a particular content area, is member of an associated professional organization and adheres to a code of ethics. Extending that to evaluation, we would surmise an evaluation professional is an individual with a high degree of knowledge or skill in evaluation, working within an evaluative context, and is a member of an evaluation association that has a code of ethics and accompanying competencies. The search for distinctiveness is part of the issue in defining a professional area, which has linkages to the intent of trait theory to create protective boundaries around the concept of profession and professional.

The field of evaluation as a whole can be understood or assumed to fit the trait definition of a profession, based on many characteristics - notwithstanding the existence of a multitude of international associations (e.g., American Evaluation Association (AEA), CES, European Evaluation Society (EES)) that include definitions for evaluation, as well as sets of capabilities or competencies and connection for professionals within the societies. Assuming then and recognizing that evaluation does indeed meet the requirements for a profession, evaluation

continues to undergo international debate on whether or not it is indeed a profession and what the

profession specifically entails (Jacob & Boisvert, 2010).

      Although evaluation meets the requirements for high skill and knowledge of individuals

practicing within evaluation, it does not identify the specific traits an evaluator is meant to have,

to make the profession "visible". The normative trait theory of a profession is one that many

theorists rely on when categorizing professions (Knight & Saunders, 1999). However,

professions and therefore professionals are not homogenous in their work and the extent to which

one portrays the traits of a profession to be understood as a professional is disputed and unclear

(Knight & Saunders, 1999). Other researchers have then rightly argued that beyond the specific

"traits" identified by trait theorists to inform what a profession and professional are, the concepts

are actually socially constructed and therefore are more complex and ambiguous (e.g., Knight &

Saunders, 1999). The theory of socially constructed definitions of professions is relevant when

considering the debates about professionalization within the evaluation community. As this

literature review demonstrates, professions and professionalism are not stagnant concepts but

rather fluid, socially constructed phenomena that adapt to the evolving needs of societies.

      It then becomes important for research on the evaluation profession and

professionalization to dive more deeply into "what it means" to be an evaluator, including

understanding key traits and the meaning behind the notion. Considering the lack of empirical

research on the debate, such an exploration is needed to go beyond the logical assumption that

being an evaluation professional is a tangible "thing", because evaluation is classified as a

profession. Equally, understanding the traits of evaluators within the evaluation profession,

certainly can contribute to understanding a way of enacting the professionalization of the field

through credentialing or licensing. The next section of the literature discusses the definition of evaluation professionalization – in the context of credentialling, licensing and certification.

How has Evaluation Professionalization been defined?

Professionalization refers to the evolution of an occupation into a recognized profession (Schwandt, 2017). In particular, engaging in a systematic process by which a particular field establishes and institutionalizes standards, codes of conduct, educational pathways, and other frameworks aimed at legitimizing and structuring the profession. Professionalization has been described as the adoption of procedures of licensing, credentialling or certification by a field of practice (Altschuld, 2005). Certification refers to the "drafting of a formal document outlining an evaluator's knowledge of basic principles of evaluation, his/her proven evaluative skills and confirmation that he/she can indeed conduct an evaluation" (Jacob & Boisvert, 2010, p. 351). Licenses would be distributed "by an "official government entity that not only legally controls licenses to practice in a field, but also the removal of same for cause."" (e.g., licenses to practice medicine); and credentialling involves "proof of completion of specified requirements, such as approved courses, internships in the evaluation field, other training, etc." (Altschuld & Austin, 2005: 49). Although these definitions have slight variances, certification, licensure or credentialling are all a means to professionalize a field.

There are varying approaches to enact professionalization in the international evaluation community through evaluation societies and through the beliefs held by individual practitioners (Jacob & Boisvert, 2010). Within the evaluation field, efforts to professionalize have been varied and focused on efforts to define and outline evaluation competencies, establish training programs in alignment with the competencies and create certification or credentialing mechanism's to help validate individuals' possession of these skills (Schwandt, 2017). Those that support

professionalization of the evaluation field look to professions such as law, medicine, or nursing,

where licensing exams, sets of competencies and public understanding allow us all, to some

degree as individuals to know *what it means to be a lawyer, doctor or nurse* and monitor the

profession for quality and competency. The question of adopting licensing, credentialing or

certification in the evaluation profession has been debated by evaluation professionals,

associations, academics, and commissioners of evaluation over many years (Jacob & Boisvert,

2010; Picciotto, 2011). For funders and commissioners of evaluation work, being able to ensure

there is a license or credential is an easy "check mark" for quality. The debate on

professionalization has not been debate about whether to adopt certification, licenses, or

credentials, but about the variance of approaches that have been enacted within the evaluation

community and the extent to which each has "got it right" (Jacob & Boisvert, 2010). In

particular, controversy exists between two general camps of opinion – those that support

adoption of credentials or licenses as a means of professionalization and those that do not.

In their review of the existing literature on evaluation professionalization, Jacob &

Boisvert (2010) identified pros and cons of evaluation professionalization from the authors. The

proponents of professionalization have claimed positive impacts including *strengthening the*

field and establish boundaries for evaluation (e.g., Jones & Worthen, 1999), *increasing training*

opportunities for evaluation by providing clear competencies to align training (e.g., Donaldson

& House, 2006), *enhancing and improving the status and prestige of evaluation* (e.g., Bickman,

1999), *facilitating the selection of evaluators and improve the quality of conducted evaluations*,

protecting the public, and *avoiding problematic or unprofessional behaviour* (e.g., Bourgault &

Parent, 2008). The positive aspects of professionalization, then, have been identified as strengths

as a function of answering "what evaluation is" and what it entails to increase the prestige and

understanding of evaluation amongst the general public (Jacob & Boisvert, 2010). Further, a

well-defined and understood profession, then, would allow there to be monitoring of the quality

of the profession against the defined competencies and protect the public from sub-par evaluators

(Jacob & Boisvert, 2010). Supporters of evaluation professionalization look to professions such

as law, medicine, or nursing, where licensing exams, sets of competencies and public

understanding allow us all, to some degree as individuals to know *what it means to be a lawyer,*

doctor, or nurse and monitor the profession for quality and competency. Authors have

underscored the importance of having criteria that assess the professionalism of distinct

occupational groups, which include prestige and status, ethical dispositions, expertise,

professional autonomy, and credentials (Picciotto, 2011).

Those who are opposed to the professionalization, (as expressed by these various

commentators) of evaluation in many ways do not disagree with the advantages identified by

Jacob & Boisvert (2010) but rather focus on identifying potential negative impacts for the

evaluation field. The opposing views for professionalization include such negative impacts as

homogenizing evaluation and restricting diversity as evaluators have varied training and come

from a multitude of disciplines (e.g., Patton, 1990), *reducing training offerings* by focusing only

on those related to the competencies, *restricting or blocking access to the profession* as

professionalization is a gate-keeping mechanism that restricts membership (e.g., Cousins, Cullen,

Malik & Maicher, 2009), and *turning evaluation in on itself* by isolating evaluation in its own

environment, losing the current breadth and diversity. In many ways, the "cons" of

professionalization are largely related to undermining the expansive expertise of evaluators

within the profession and preventing diversity through gatekeeping of the profession (e.g., Jacob

& Boisvert, 2010, Wolinsky, 1988). Those who are in opposition to professionalization, largely

those who practice within the field itself, describe creating an insiders-vs-outsiders environment

that diminishes the positive diverse and experienced backgrounds of its practitioners. In fact,

others have argued that the boundaries of evaluative practice are permeable and can be identified

in many professional domains and disciplines, running contrary to trait theorists who have

highlighted the importance of determining a set of "traits" that an evaluator possesses (Knight &

Saunders, 1999). Compounding the "is evaluation a profession or isn't it debate" is literature

highlighting evaluation as a social construction, where there is no such thing as professionalism

and the notion of evaluation profession as a concept is quite contested (e.g., Knight & Saunders,

1999; Iversen, Gergen & Fairbanks, 2005).

Professionalization and Professionalism: What's the Difference?

Within the literature, scholars have noted there is a nuanced distinction between

professionalization and professionalism (e.g., Schwandt, 2017) which sheds light on their

disparate yet interrelated concepts within the context of evaluation. Given the tangle of concepts

and perceptions, it is important to distinguish between professionalization and professionalism.

While professionalism refers to the individual or collective adherence to ethical standards,

competence, and conduct expected within a particular field, professionalization delves deeper

into the institutionalization and systematic development of these qualities within a profession

(Schwandt, 2017). Schwandt underscores that professionalism encompasses ethical behavior and

fidelity to an evaluation ethos, emphasizing the practitioner's commitment to integrity and

accountability. Other scholars have noted that professionalism has many advantages and

challenges. While professionalism brings significant advantages to society, there's a tendency for

self-regulated professions to lean towards arrangements that favor the professionals themselves

(Julnes & Bustelo, 2017). Efforts to address this dilemma and reap the benefits of

professionalism while minimizing its drawbacks include strategies aimed at preventing a

"professional practice" from being dominated by vested interests.

On the other hand, professionalization involves broader processes aimed at legitimizing

and structuring the profession, including the establishment of standards, codes of conduct, and

educational pathways. Thus, professionalism speaks to the ethical and moral compass guiding

evaluators, while professionalization encompasses the broader institutional frameworks that

support and cultivate these values within the evaluation discipline. In essence, professionalism is

about personal conduct and expertise, while professionalization is the structural framework that

supports and defines a particular occupation or field. Both of which can be understood and

perceived individually by evaluators as similar or distinct concepts.

Given the controversy and the conceptual swamp, surrounding evaluation as a profession

and the professionalization of the evaluation field, it then becomes both interesting and important

to examine real-world examples of enacting evaluation professionalization on the positioning,

practice, and employability of evaluators. Conducting such research into the cases rather than

reiterating theoretical information will provide insight into the experience of evaluators within

the context. To address the literature gaps and lack of real-world evidence on professionalization,

a case example is needed to progressively focus and examine the evaluation profession it's

professionalization, based on the assumptions that evaluation is a profession both in traits (via

competencies) and in construct.

Credentialism: The Canadian Case

The following section outlines the Canadian Case utilized in the research to examine the

impact of evaluation professionalization enacted through credentialization as a case study. The

evolution of professionalization within the field of evaluation has been marked by a distinct

approach pioneered by the CES. This section delves into the historical trajectory and unique

methodology that CES employed to establish a competency-based framework for evaluators and

create the CE designation. Beginning with the society's move towards competency-based

professionalization, the narrative traces the evolution from the 1990s debates through to the

official launch of the CE designation in 2009. The administration and foundation of the CE

designation, including competency domains and the application process, are explored.

Additionally, the broader implications of CES' approach to professionalization and its distinction

from other jurisdictions" methods are examined, shedding light on the discourse surrounding the

evaluation profession's nature and the diverse routes to its professionalization. All of which

inform the context of the current research.

History and Approach to Professionalization through Boundary Creation of Unique Competency Clusters

In a unique approach to enacting professionalization, CES has created a competency-

based framework for evaluators and to create a designation aligned with the competencies –

which is the only current qualification in evaluation in the world (Canadian Evaluation Society,

2023a). Much of the impetus for the creation of a credential or qualification approach to

professionalization can be traced to the status of evaluation in Canada – heavily embedded

throughout the federal government function (detailed by Gauthier, Lahey & Jacob, 2022).

Following a lengthy debate through the 1990s and continued interest amongst its membership,

the CES' national board of directors began seriously considering the development and

implementation of a system of professional designations for evaluators in 2006 (Cousins et al.,

2009). A survey administered around the same time to Canadian evaluation practitioners

identified interest in professionalization and certification amongst practitioners (Gauthier, Borys,

Kishchuk & Roy, 2006). Practitioners identified through that survey the desire for professional

designation to enhance evaluator credibility and improve the quality of evaluation (Gauthier, et

al., 2006). Further, outside the membership, CES observed interest in professionalization of

evaluation from the Centre of Excellence for Evaluation (CEE) of the Treasury Board of Canada

Secretariat (TBS) in preparing for national evaluation policy renewal (Cousins et al., 2009). As a

result, CES commissioned a "Fact Finding Regarding Evaluator Credentialing RFP" to inform

the society of professionalization implementation (Cousins et al., 2009).

In 2007, after the delivery of an action plan for enacting professionalization, CES

engaging in consulting its members through a multi-pronged approach and held a town hall

meeting at the CES national conference entitled: Should CES Establish a System of Professional

Designations? If so, What Would It Look Like?" (Cousins et al., 2009). Discourse at the town

hall reflected the pros and cons outlined through the literature and highlighted the continued

debate amongst the profession for professionalization. CES then undertook the Professional

Designations Project from 2007-2009 based on both the support and concerns of members to

proceed with the implementation of a voluntary designation (in contrast to a proposed, two-

tiered, mandatory credential). The project created foundations for the designation, including the

development of ethics, standards, and competencies. Ultimately, in June of 2009, the CES

officially launched the Credentialed Evaluator (CE) professional designation with the aim to

promote ethical, high quality, competent evaluation (Fierro, Galport, Hunt, Codd & Donaldson,

2016). It should be noted, that the CES built the CE on the assumptions that evaluation is, in fact,

a "profession" both in traits (via competencies) and in construct (socially constructed by

evaluators) and the CE represents their version of enacting evaluation professionalization.

Administration of the Credentialed Evaluator Designation

The CE designation is administered through the Professional Designation Program (PDP) which includes three pillars: evaluation standards, evaluation competencies and a code of ethics that all contribute to the professionalization of evaluation in Canada (Fierro et al., 2016, Gauthier et al., 2006). Awarding of the designation of *Credentialed Evaluator* is completed through an application and peer reviewed competency-based assessment process (Canadian Evaluation Society, 2023a). Minimum application requirements include evidence of a graduate-level degree or certificate; evidence of 2 years (full time equivalent) evaluation related experience; and education and/or experience related to 70% of the defined competencies (Buchanan, 2015). The CES describes and defines key competencies for evaluators to uphold in practice as a foundation of the PDP (Canadian Evaluation Society, 2023a). The competencies were informed by the work of Stevahn, King, Ghere, and Minnema (2005) and developed through research, consultation, and validation to fit the Canadian context (Canadian Evaluation Society, 2023a). There are 36 competencies defined into five domains including reflective, technical, situational, management and interpersonal practice (Canadian Evaluation Society, 2023a). Once an application is submitted with all supporting documentation, members of the Credentialling Board assess the application for completion and assess it for awarding of the designation. Once awarded, maintenance of the credential is completed through professional development hours (40) that are submitted each year as well as a yearly maintenance fee submitted to CES.

By leveraging the designation, the organization seeks to elevate the professionalization of evaluation in Canada, and advance excellence in evaluation across Canada and internationally (Canadian Evaluation Society, 2023b). Likely in large part as a result of the continued debate of professionalization, the CES has implemented a model for the credential that is voluntary and

incorporates elements of education and experience and the CE "defines the holder as having the experience and education to be competent – not that the CES has certified the holder as competent" which differentiates the CE from other professions or certification (exam) processes (e.g., medicine, law) (Buchanan, 2015).

Approach to the Idea and Enactment of Professionalization in Other Jurisdictions

The CES 'approach to professionalization has led to the establishment of a competency-based framework for evaluators and the creation of the CE designation. The society's journey from the 1990s debates to the official launch of the CE in 2009 showcases a commitment to shaping evaluation as a recognized profession through a defined pathway. The administration of the CE designation, guided by competency domains and rigorous peer review, underscores CES' dedication to fostering ethical, high-quality evaluation practices. As CES' unique pathway diverges from other jurisdictions' methods, it sparks discussions on the multifaceted nature of enacting professionalization and the broader dynamics of the evaluation profession.

One of the considerations for the context of the qualification in Canada is the support of the federal government to institutionalize evaluation (Gauthier, Lahey & Jacob, 2022). Notably, the federal government's endorsement of professional evaluation credentials, evidenced by its allocation of additional points for accredited evaluators in federal contract bidding, signals a significant step towards embedding evaluation expertise into governmental decision-making processes. However, it's important to acknowledge that this institutionalization is nuanced and not as all-encompassing as some observers might presume. Federal government support and focus has ebbed and flowed with the political parties in office. Further, while federal support provides a solid foundation, the absence of mandatory evaluation standards at the provincial

level, which oversees critical areas like healthcare and social services, suggests a fragmentation in the institutionalization of evaluation across different levels of governance in Canada.

Regardless of the approach to enacting professionalization, the CE designation is currently the only the only evaluation credential that exists for the profession. Other jurisdictions have addressed professionalization through the development of competency or capability frameworks following the CES (e.g., AEA, EES) but have maintained their position against pursuing a credential (European Evaluation Society, 2021). The capability or competency frameworks are seen as a key pillar of professionalism but avoid many of the messy, nuanced, and potential negative impacts of professionalism identified through implementing a credential (European Evaluation Society, 2021). Based on the unique Canadian experience towards professionalism in contrast to other jurisdictions, an investigation into the impact of the credential in Canada and compared to others then becomes of interest, especially considering the discourse and international debate on not only the construct of evaluation as a profession, but the approaches to professionalization.

Conclusion

This chapter has explored the evolution of professions and the concept of professionalism, laying the groundwork for understanding the trajectory of evaluation as its members seek to define it by using the designation "profession". The discussion encompassed trait theory as a lens to differentiate professions, the ongoing debate surrounding evaluation's professional status, and the complex nature of being professional within various domains. Through the lens of trait theory, professions are recognized for their distinct attributes, expertise, and dedication to ethical practice, underpinned by extensive education and training (Knight & Saunders, 1999).

The chapter has emphasized that the evaluation field's definition as a profession remains a subject of ongoing discourse, particularly in the context of its evolving nature and diverse practitioner backgrounds. The debate on professionalization within evaluation has highlighted contrasting perspectives, with proponents emphasizing the potential benefits of establishing criteria to enhance quality, credibility, and the public's understanding of the field. On the other hand, opponents" express concerns about the potential homogenization of evaluators and the restriction of diverse backgrounds. The evolving nature of evaluation's professionalization and its intricate relationship with credentialing have been addressed through the lens of the CES' unique approach. CES' development of a competency-based framework and the establishment of the CE designation have demonstrated a commitment to shaping evaluation into a recognized profession, aligning with the broader international discourse on professionalization.

In light of the nuanced perspectives on professionalization enactments, this chapter underscores the importance of examining concrete cases like the CES' approach to understanding the implications and outcomes of professionalization for evaluators, the evaluation field, and the broader professional landscape. By investigating real-world scenarios, the research aims to provide insights into how enactments of professionalization influence the evaluation profession's trajectory, practitioners' experiences, and the practical outcomes of credentialing. This study's progressive focusing, mirroring the evolution of professionalization itself, sets the stage for an in-depth examination of the evaluation profession through the lens of the Canadian case study, contributing to the ongoing dialogue surrounding the nature and pathways of professionalization in the field of evaluation.

Chapter 3: Methodology - Aims of Research

This research aims to advance understanding of the effects of an attempt to enact a notion of professionalization evaluation through credentialization. It examines the experience of evaluators of this process and the impact on the positioning, practice, and employability of evaluators using a national case study of Canada. It is an investigative research project focusing on the PDP offered by the CES, in particular the CE designation (Canadian Evaluation Society, 2023a). It locates the PDP and the credentialling program for CES as a strategy to professionalize evaluative practice. In this chapter, I offer an overview of the research context, design, methodologies employed, and also share insights into my role as a researcher. I navigate through my distinctive positionality, shaped by a constructivist epistemological framework and a pragmatic worldview, which encompasses multiple roles in my research journey. Using a case study approach, I detail the range of data collection methods and expound upon the strategy for data analysis and reporting. The chapter addresses the utilization of a multi-method approach that merges quantitative and qualitative techniques, bolstered by the integration of two pivotal theoretical frameworks: a framework drawing on Bernstein's classification and framing theory (1973), enabling an in-depth grasp of competencies, and the "Use, Knowledge, and Self-actualization" framework (e.g., Oughton, 2010), facilitating insights into the repercussions of qualification approaches. These "classic" sociological frames not only enrich the exploration of the evaluation profession's impact but also harmonize with my pragmatic stance, ultimately laying the groundwork for the forthcoming examination and discourse of study findings in Chapter 4.

Research Context and Questions

The PDP program was evaluated in 2016 (Fierro et al., 2016) through a formative evaluation focused on efficiency, effectiveness, unintended impacts and sustainability and growth of the CE designation to examine the extent to which it was attaining its desired outcomes. The evaluation identified key findings related to the evaluation questions as well as provided some recommendations to inform further program development. This investigative research will build upon the spirit of the initial evaluation by using empirical research to examine impact beyond the program itself by progressively focusing on the concepts of professional, professionalization, competencies and credentialization. The research involves a detailed exploration of the experience and perception of these processes by evaluators in Canada and extends the analysis by a comparison with key informants" views within the international context of attempts at evaluation professionalization.

The key research question is:

What has been the impact of evaluation professionalization in Canada as enacted through the PDP (CE designation) offered by the Canadian Evaluation Society on the positioning, practice, and employability of evaluators?

Within this research question, more focused research sub-questions include:

- *How does the program compare to other international models or positions on evaluation professionalization?*

- *What can be learned about the effects of enacting an idea of professionalization from the experience of other international evaluation associations and their positions on evaluation professionalization?*

- *What is the experience of CEs in obtaining the designation? In practicing with the designation? How has the CE impacted evaluators' practices in Canada and their employability?*

- *What can be learned from the application of a credential for evaluation in Canada?*

The following will outline information about the research context, design, and methods; including my positionality as a researcher, my approach to collecting data to inform the project (methods), my analytical and presentational methodology as well as two theoretical frameworks that will be used to understand the data.

Positionality of the Researcher: Multiple Roles and Insider Status

As a researcher, my involvement in this study encompassed various roles. These roles included being a professional evaluator with the CE designation, an active member of CES, and holding positions, including a current role, on both the CES provincial and national boards. This multifaceted engagement allowed me to leverage and seamlessly integrate my research efforts. In the exploration of the implications of an enactment of professionalization, as supported by a Canadian evaluation designation, the selection of an appropriate research context was of paramount importance. This endeavor required establishing meaningful connections with evaluation associations and societies, such as CES, to effectively delve into the research inquiry.

Being closely affiliated with the evaluation society of interest proved advantageous, as it provided an immersive understanding of "evaluative thinking and practice" within their specific context. Drawing upon my prior experiences and my roles on the national and provincial boards of CES, my pre-existing relationship with the organization facilitated the seamless integration of the research efforts, making the most of existing connections without undue effort. Additionally, the intersection of my professional journey and the relationships cultivated in the field, combined

with the guidance from my academic supervisor, created a valuable personal link to global

evaluation associations. These affiliations played a pivotal role in providing essential contextual

insights and data regarding the progression of professionalization in the field of evaluation.

Navigating the Researcher's Multifaceted Roles

        To accurately describe the context for the present study, it is important to recognize the

multiple roles I played. First, I was a longstanding (since 2014), active board director on both the

national and provincial chapter boards for CES. I also was an active member of the evaluation

community by building capacity in evaluation through offering webinars, providing educational

training, participating in conference presentations and discussions about evaluation as well as

researching evaluation (e.g., Brower, 2016). Further, through the study I continued my

employment as an evaluator. The multiple roles I held during the timeframe of the study allowed

for an in-depth understanding of the contextual elements surrounding the evaluation profession

and CES as an organization including the political climate, governance structure, organizational

and process understanding, as well as key debates or areas of discussion in the evaluation

community. The understanding and relationship building I was able to generate as a function of

this position offered a unique and "insider" perspective to inform the development of research

questions, data collection tools and findings on the topic of interest and provide opportunities for

enhancing data collection processes as a function of pre-existing relationships and connection to

the CES. I was aware of the potential bias in operating in multiple roles and I continued to be

aware of any instances where bias may have influenced my thought process in this study.

Generally speaking, the immersion within the profession as well as CES, including ongoing

participation increased my ability to comprehend and understand the perspectives of the

organization and stakeholders when undertaking the research role. The multiple roles I held seemed to enhance the quality of my experience and the quality of this research.

Positioning as a Researcher

In the role of a researcher investigating the influence of evaluation professionalization in Canada, particularly through the CE designation offered by the CES, my own positionality profoundly shapes the approach and interpretation of this study. Rooted in a constructivist epistemological framework, I recognize that knowledge is not an absolute truth but rather a product of interactions and interpretations (Burr & Dick, 2017). As a researcher, I acknowledge the subjectivity inherent in the research process and seek to co-construct knowledge with participants, valuing their perspectives in understanding the impact of professionalization efforts.

In this endeavor, I adopt a multi-method and progressive focusing approach that aligns with my constructivist epistemology. By employing diverse research methods, such as surveys, interviews, and document analysis, I aim to capture the complexity of the phenomenon under investigation from various angles. Multiple lines of evidence suggest that my epistemological assumptions align with efforts to collect data so that I gain understanding within the naturalistic context in which I am studying. I believe there are always multiple realities and multiple views from participants that may not be relayed accurately through only one data source. In this way, my data collection procedures collect information from a variety of perspectives to capture a comprehensive understanding. The progressive focusing method allows me to iteratively refine research questions, adapting to emergent insights as they unfold. This approach aligns with my recognition of knowledge as a dynamic, evolving entity, and it allows for a more holistic understanding of the implications of the CE designation on the positioning of evaluation, evaluative practices, and employability of evaluators.

Philosophically, I approach this study with a pragmatic worldview, emphasizing the practical implications and applications of research findings. I acknowledge the interconnectedness between theory and practice, and I am committed to generating knowledge that not only contributes to academic discourse but also informs real-world decision-making within the field of evaluation professionalization. By embracing this pragmatic perspective, I aim to bridge the gap between theoretical considerations and the practical needs of evaluators and stakeholders within the Canadian evaluation landscape. This is because I seek to understand the world in my study through participant views to solve a gap I have experienced in my professional understanding (Creswell, 2013), that is the impact of professionalization on the positioning, practice, and employability of evaluators in Canada. The practical data collection indicates that my ontological views are aligned with how I view the nature of my reality. The focus of this research emerged as a product of my experiences as an evaluator. As a result of this view of the nature of reality, the research topic, as well as the choice of a case study methodology were influenced by my ontological views that highlight the pragmatic approach I take in my study.

Notably, I embrace a non-essentialist perspective regarding the nature of evaluation and the concept of a profession, which contrasts with an essentialist viewpoint often associated with proponents of evaluation professionalization. I acknowledge that evaluation is a socially constructed phenomenon, dynamically shaped by context, societal influences, and the diverse viewpoints of practitioners. This non-essentialist stance underscores the evolving nature of evaluative practice and how it is depicted, emerging from ongoing negotiations and shared interpretations within its broader socio-cultural context.

In conclusion, my positionality as a researcher investigating the impact of evaluation professionalization through the CE designation in Canada is deeply influenced by my constructivist epistemology, multi-method and progressive focusing approach, and pragmatic worldview. These philosophical underpinnings guide my research process, shaping how I engage with participants, analyze data, and ultimately contribute to the broader discourse on the way enactments of professionalization is shaping the practice of evaluation and the employability of evaluators in the Canadian context.

Methods

Given the focus of the research, I utilized a mixed methods case study design to explore the impact of evaluation professionalization enactment in Canada through the PDP program (CE designation) offered by the CES. The following outlines the definition of "impact" for the current research, the approach and methods employed.

Operational Definition of "Impact"

It should be noted that in this research I created an operational definition of "impact". Within the evaluation community, "impact" as an idea has been contested, predominately because there are methodological issues in identifying causal links "between interventions, programmes and policies and desired outcomes" (p. 89, Saunders, 2011). The processes linking the effects are often indirect and inherently challenging to measure (Saunders, 2011). To rectify the challenges associated with directly cause and effect, recommendations to utilize multiple method approaches have been cited as the "gold standard" (European Evaluation Society, 2007).

Impact, within this context, a study on the enactment of evaluation professionalization, refers to the transformative effects and consequential changes resulting from the presence or attainment of a credential within the field of evaluation. It encompasses a multifaceted assessment of the

influence of the credential on various aspects, including the field of evaluation itself, the

practices and methodologies employed by evaluators, and the employability and professional

advancement opportunities available to individuals in the evaluation profession. The impact of

the credential is measured by the extent to which it enhances the knowledge, skills, and

competencies of evaluators, promotes the adoption of standardized practices and ethical

guidelines, and elevates the overall quality and credibility of evaluation work. Moreover, the

impact extends to the broader evaluation community, as it may shape professional networks,

foster collaboration, and contribute to the advancement and recognition of the evaluation

discipline as a whole.

Approach to Methods

A case study was an appropriate framework for undertaking the current research because of

its utility to examine environments in real-time, its ability to document phenomena within its

natural context and examine phenomenon within a bounded system (Stake, 1995). In addition,

case studies are of particular use when context is essential to the research, when you want to

answer "how" or "why" questions where it is not possible to manipulate behaviour (Yin, 2014)

and they allow the use of multiple sources of triangulated data (Creswell, 2013).

Mixed methods studies combine both qualitative and quantitative elements in a single study

and can allow researchers the opportunity to corroborate findings across methods, expand on the

breadth of findings or clarify findings from one method to the other. (Halcomb, 2019). Mixed

methods approaches are best used when a combination of quantitative and qualitative data can

more fully answer the research question, and creativity is needed from a design perspective to

investigate a complex topic (Halcomb, 2019). Although there are many positives to utilizing

mixed methods, the design itself can pose challenges. Mixed methods designs are resource

intensive and require expertise in multiple methods (Creswell & Plano Clark, 2011), and require the integration of sources in analysis and presentation (Halcomb, 2019).

I utilized three methods of data collection to inform the case study: desk review of the competency and professionalization stances of other evaluation associations, key informant interviews with international and Canadian stakeholders (often representatives of evaluation associations), and a survey with evaluators (focus on Canadian evaluators). The methodology employed embraced a mixed methods design aimed at maximizing the efficacy of data collection and analysis. Initially, a comprehensive desk review of international competencies and professionalization was conducted to lay the groundwork for subsequent phases. This review informed the development of tailored data collection tools. Subsequently, a survey was crafted for Canadian and international evaluators, tested, and then administered. Simultaneously, the key informant interview guide with stakeholders was drafted to ensure that the insights garnered from the survey were complemented and enriched. This sequential approach allowed for a synergistic interplay between data collection methods, facilitating a comprehensive understanding of the subject matter. Any pertinent literature identified during the interviews or survey process was further explored in the desk review. By orchestrating data collection in this manner, the study not only optimized the capture of relevant information but also enriched the contextual understanding derived from the survey data. In essence, the methodology acted as a canvas, allowing the background of the painting to be filled in with the depth and richness attained from the key informant interviews. The data collection methods are described in more detail below.

Desk Review of International Competencies and Professionalization

To provide contextual and historical information, a desk review was conducted, focusing on professionalization of evaluation internationally. An assessment of key evaluation societies or associations and their subsequent competencies and stance on professionalization was conducted. For the purposes of this research and comparative understanding, competencies and views of professionalization were sought from the following evaluation associations based on their size and influence for the field: Canadian Evaluation Society (CES), European Evaluation Society (EES), American Evaluation Association (AEA), Australasian Evaluation Society (AES), the African Evaluation Association (AfrEA) and the UK Evaluation Society (UKES). In addition, supporting position papers and grey literature were reviewed about the association's stance on professionalization. The review served to provide an answer to one of the research questions by comparing the Canadian experience of professionalization to other international jurisdictions to see what could be learned. The desk review served both as key contextual background information for the research but also as a data collection method to address one of the research questions by conducting a comparative analysis of professionalization across jurisdictions. The desk review was completed first, to provide context to inform other data collection methods. It was returned to after the completion of all data collection to ensure other information identified or published between data collection methods was captured. In total, 46 documents were reviewed and analyzed.

Survey Administered to CES Members and CEs

One of the primary sources of data in the case study was the development of a survey that was administered to members of CES to understand their view on the CE credential, process, and experience. The survey was informed through the desk review and included multiple

pathways based on responses from participants: first, based on whether or not they were a CES

member (e.g., Canadian Evaluator or a non-member Canadian evaluator or a non-Canadian

evaluator) and then, for CES members who have been awarded the CE credential, and for CES

members without the credential. The survey examined non-CES & CES (non-CE and CE)

members' views on the credential, the process, and the impact of the CE on the position,

practice, and employability of evaluators. For CEs, the survey examined their experience

obtaining the CE, the impact of the CE on their practice, their observations of the evaluation

context and marketplace in Canada, their current membership, CE and professional evaluation

status and additional experiential and satisfaction information. For respondents who had not

received the CE credential, information was sought on the professionalization debate and their

views on professionalization. The survey was hosted on the online SurveyMonkey platform on a

Canadian server and was tested with a small group of Canadian Evaluators prior to distribution

for functionality. The online survey link was distributed directly through the CES to all CES

members who had opted in to receive email communications on December 16, 2022, with a

reminder sent on January 5, 2023. The CES also shared the survey link on CES" social media

pages (Twitter, Facebook, LinkedIn) and I posted the survey link on my personal social media

pages (Twitter, LinkedIn). The survey was closed on January 23, 2023. The survey garnered 354

responses.

Key Informant Interviews with Canadian and International Evaluation Stakeholders

Given the focus of the research to examine the influence of enacting a professionalization effort

on the larger evaluation context in Canada, key informant interviews (KIIs) with both Canadian

and other international evaluation stakeholders were conducted to understand the impact of

professionalization, globally. The KII guides were developed afte the launch of the survey to

ensure that additional contextual information could be captured to inform the research questions.

The KII guides reflected the progressive focusing of the research by examining the international

key informant's reflection on evaluation as a profession, the professionalization of evaluation

and the credentializing of evaluation through the specific Canadian case. Key informant

interviews were sought with individuals who were linked to the evaluation associations focused

on for the desk review of competencies and professionalization, and conducted with

representatives from the CES, EES, AEA, AES, AfrEA and the UKES. In addition,

representatives who had past history with those organizations or other international evaluation

organizations (e.g., the International Organization for Cooperation in Evaluation (IOCE)). The

focus of the KIIs was to utilize the progressive focusing of the research to examine the KI's

views on professionalization, the stance of their societies related to the professionalization debate

and their view on the Canadian experience of professionalization (CE credential). Key

Informants were identified through contacting the evaluation associations of the organizations

noted in the desk review and asking for participation from individuals who were on the board of

directors or had experience within the association related to evaluation professionalization. A

direct email was sent to the association with an invitation and request for participation. A total of

10 interviews were completed with international key informants and 22 with Canadian key

informants.

Data Analysis and Presentational Methodology

In the current research, three sources of data were sought to inform the case study: desk

review of international competencies and professionalization, key informant interviews with

Canadian and international evaluation stakeholders, and survey with evaluators, including CES

members and CE's. The use of multiple sources of data is a strength of case study research as

they allow for converging lines of inquiry or data triangulation (Yin, 2014). That being said, a key challenge of mixed methods research is the explicit integration of data sources (qualitative and quantitative) in a single study (Halcomb, 2019).

To address the issues with integration of data sources, Yin's case study protocol was utilized for the analysis of all data as he provides a comprehensive data analysis description that can be followed for data integrity (Yin, 2014). As a result, there were two steps to the data analysis, the first being the individual analysis of each data source (descriptive statistical analysis for the survey(s) and administrative data utilizing excel software, thematic analysis for the key informant interviews utilizing NVivo software) followed by the integration of all data sources to provide a summary of themes to best understand the impact of evaluation professionalization in Canada on the position of evaluation, practice of evaluators and employability of evaluators.

In a mixed methods design, there are different types of data that must be analyzed and integrated (Creswell, 2013). In this particular study, the data from the three sources was summarized to inform the exploratory research questions. In the presentation of this data, I utilize the desk review and summary of the literature (including key quotations) to inform the context for the study as well as provide background information to inform the research questions about how other associations position and view evaluation professionalization. I use the key informant interviews, including key quotations, to also inform the research questions about how other associations position and view evaluation professionalization and the impact of a credential on the evaluation field. The survey data was utilized to understand the experience of evaluators in Canada with the CE as a means to professionalization and is contrasted with information garnered from the other two sources on the view of other associations.

The presentational methodology employed in this thesis incorporates a comprehensive analysis of diverse sources of data to construct a robust understanding of the research topic. I synthesize information from multiple avenues, such as the survey, interviews, desk review, and existing literature, in order to gain a holistic perspective and enable a more nuanced exploration of the subject matter. To make sense of the data, I adopt a thematic approach, identifying underlying patterns, connections, and recurring concepts, which are organized into meaningful themes. These themes serve as the building blocks for constructing case assertions in the discussion chapter, evidence-based claims derived from the analysis. Through case assertions, I synthesize the findings, draw connections, and construct a coherent narrative that informs the conclusions and implications of the study. This presentational methodology ensures that my research goes beyond mere description and facilitates a deeper understanding of the research topic, allowing for the identification of broader implications, theoretical contributions, and potential practical applications.

Frameworks for Sensemaking

In the dynamic and multidisciplinary environment of evaluation, understanding the role of professionalization efforts, including qualification approaches and their utilization is of interest. In particular, understanding through a Canadian case, attempts to professionalize evaluation through credentialization by understanding the experience of evaluators, the impact on the positioning, practice and employability of evaluators. As a researcher, my curiosity lies in unraveling the complexities of this field and examining the extent to which qualification frameworks are employed as a means of structuring knowledge, enhancing professional practice, and promoting self-actualization among evaluators. To make sense of the findings, I will utilize two frameworks: Basil Bernstein's (1973) classic theory of classification and framing and the

Use, Knowledge, and Self-actualization conceptual framework (described by Gopinath, 2020);

Machell & Saunders, 2012, Neto, 2015; Oughton, 2010; Fuller, 1994). These conceptual

frameworks will help to interpret the data outlined through the methods and their implications.

Below, I overview the two frameworks.

Classification and Framing

To better understand the status of evaluation as a profession and the significance of

enacting credentials within the Canadian context, the application and adaptation of the concepts

of classification and framing from the field of sociology of education (Bernstein, 1973;

Bernstein, 2018; Morais & Neves, 2018; Pluim, Navir & Wallace, 2020) provides valuable

insights into the challenges and opportunities for professionalization in evaluation. By employing

these concepts, we can gain a deeper understanding of the classification and framing boundaries

within evaluation and explore the implications for the value of credential. Classification refers to

the process of categorizing knowledge, skills, and competencies into distinct groups or domains,

while framing involves the contextualization and interpretation of these categories within the

broader context (Bernstein, 2018). By drawing on this framework, I will investigate how

qualification frameworks organize and structure evaluation knowledge, identify the criteria for

classifying competencies, and explore the implications of these classifications on the

professional development and recognition of evaluators. Furthermore, I will examine how the

framing of qualification frameworks influences evaluators' perceptions of their roles,

responsibilities, and opportunities within the multidisciplinary evaluation field.

Bernstein's theory of classification and framing as applied to evaluation can provide

valuable insights into the classification and framing boundaries observed within the evaluation

profession in Canada (1973). According to Bernstein, classification refers to the process by

which social institutions categorize and classify knowledge, practices, and individuals. It involves the creation of boundaries and hierarchies that define different occupational groups and their expertise. In the case of evaluation, the lack of a centralized regulatory body or standardized credentials contributes to the low classification of the profession. Without a formalized system of classification, evaluation professionals may struggle to establish their distinct identity and expertise within the broader landscape of professions. As a result, evaluation is not universally recognized as a well-defined field with clear boundaries, leading to challenges in professionalization efforts. This is reflected in the debate in the literature as discussed in Chapter 2.

Framing, as proposed by Bernstein, focuses on the social and cultural contexts that shape the understanding and interpretation of professional roles and practices. In the evaluation profession, the framing of evaluation work is influenced by factors such as societal expectations, organizational structures, and interactions with other professions. The absence of strong boundaries in evaluation contributes to its blurred distinction from related fields and hinders the establishment of a clear professional identity. Drawing on Bernstein's theory, it becomes apparent that the low classification and framing boundaries within the evaluation profession can limit practitioners to be recognized as having impact, and ability to establish practice and theoretical boundaries akin to more established occupations which attach the "professional" prefix. Without a cohesive classification and framing system, evaluation professionals may face difficulties in articulating their unique contributions, setting standards, and effectively communicating the value of evaluation to stakeholders.

In this research, an adaptation of the Bernsteinian (1973) concepts of classification and framing serve as a comprehensive framework for understanding the data. By applying these

concepts, the study aims to gain deeper insights into the professionalization of evaluation within

the Canadian context. Classification will be employed to categorize and analyze the knowledge,

skills, and competencies within the evaluation field, shedding light on the challenges and

opportunities for credentialing and recognition. Additionally, framing will be utilized to

contextualize and interpret the perspectives and roles of evaluation stakeholders, including

professionals, organizations, and policymakers. This framework will enable a nuanced

examination of how qualification frameworks shape the perception of evaluators' roles and

responsibilities, as well as how societal and organizational factors influence the understanding of

evaluation within the multidisciplinary landscape. Overall, the integration of classification and

framing will offer a robust lens to examine the perceptions of the complexities and intricacies of

evaluation as a practice seeking to define itself as a profession and contribute to enhancing its

positionality, standing and impact in Canada.

Use, Exchange, Knowledge, and Self-actualization

The framework of "Use, Exchange, Knowledge, and Self-actualization," (Gopinath,

2020; Machell & Saunders, 2012; Neto, 2015; Oughton, 2010; Fuller, 1994; Yan, Wang, Chen &

Zhang 2016) offers a lens through which to understand the dynamics between qualification

frameworks and evaluation practices. This framework explores how knowledge is transmitted,

utilized, and integrated within professional fields. By applying these concepts, I aim to examine

the ways in which qualification frameworks in evaluation contribute to the utilization of

knowledge, the development of evaluators' skills and competencies, and the promotion of self-

actualization in their professional journeys. Through this lens, I will analyze how qualification

frameworks shape the understanding and application of evaluation knowledge, and how they

facilitate the growth and development of evaluators as they navigate their careers.

The theory of use, exchange, knowledge, and self-actualization offers a comprehensive framework for understanding different qualification approaches and evaluating the value of training and qualifications. As Fuller (1994) describes, this theory posits that the worth of a qualification or training can be examined through interconnected dimensions: "use" value and "exchange" value. Firstly, the "use" value refers to the practical relevance and applicability of the acquired knowledge and skills in real-world work tasks. A qualification with high "use" value equips individuals with competencies directly applicable to their job roles, enhancing their ability to perform tasks efficiently and effectively. In this context, qualifications are valued for their immediate impact on enhancing job performance and meeting organizational needs.

Secondly, the theory emphasizes "exchange" value, which relates to the ability of an individual holding the qualification to leverage it for improved career prospects, better job opportunities, and further educational advancement (fuller, 1994). Qualifications with significant "exchange" value provide individuals with a valuable credential that can be recognized and valued in the labor market. These qualifications open doors to higher-level positions, promotions, and access to additional education or training opportunities, enabling individuals to progress in their careers and achieve their self-actualization aspirations.

The dimension of self-actualization refers to the process of individuals realizing their full potential, achieving personal growth, and fulfilling their intrinsic aspirations. Qualifications that contribute to self-actualization empower individuals not only with relevant skills for their job roles (use value) and opportunities for career advancement (exchange value) but also with a sense of fulfillment and purpose in their professional journey (Oughton, 2010). When individuals can align their qualifications with their innate talents and passions, they are more likely to experience job satisfaction and a deeper sense of accomplishment. As a result, the theory

recognizes the significance of personal fulfillment and well-being in the overall value of

qualifications, acknowledging that the pursuit of self-actualization plays a pivotal role in shaping

individuals" overall career trajectories and life satisfaction. In this context, education and

training programs that foster self-awareness, personal growth, and a sense of purpose are seen as

instrumental in helping individuals reach their highest potential and lead fulfilling lives both

professionally and personally.

   The "Use, Exchange, Knowledge, and Self-actualization" framework, as explored in the

works of Machell & Saunders (2012), Oughton (2010), and Fuller (1994) and others, provides a

framework to explore valuable insights into the dynamics of qualification frameworks and

evaluation practices. This framework delves into how knowledge is transmitted, utilized, and

integrated within professional fields. By applying these concepts in the research, the aim is to

examine how qualification frameworks in evaluation contribute to knowledge utilization, the

development of evaluators' skills, and the promotion of self-actualization in their professional

journeys. The theory of use and exchange value within the framework highlights the practical

relevance and applicability of qualifications, enabling individuals to excel in their job roles (use

value) and leverage their credentials for career advancement and educational opportunities

(exchange value). Moreover, the dimension of self-actualization emphasizes the importance of

aligning qualifications with individuals" talents and passions, fostering job satisfaction and

personal fulfillment. Ultimately, the framework sheds light on how qualification approaches

shape the understanding and application of evaluation knowledge, while also facilitating the

growth and development of evaluators as they progress in their careers.

Summary

The current research adapts the concepts of classification and framing (Bernstein, 1973) as a comprehensive framework to understand data related to the professionalization of evaluation in the Canadian context. The "Use, Knowledge, and Self-actualization" framework, drawn from works by Gopinath (2020), Machell & Saunders (2012), Neto (2015), Oughton (2010), Fuller (1994), and others, offers valuable insights into qualification dynamics and evaluation practices. The integration of the classification and framing concepts with the "Use, Knowledge, and Self-actualization" framework presents a robust lens to explore the complexities of the evaluation profession in Canada, ultimately contributing to its professional standing and impact in the field.

Chapter Summary

This chapter provided an overview of the research context, design, and methods employed in my study. As a researcher, I embrace a pragmatic worldview, recognizing the value of multiple perspectives and aiming to address practical issues in the research context. To inform the project, I used a case study approach, using multiple methods for my data collection, which included a desk review of international competencies and professionalization, key informant interviews with Canadian and international evaluation stakeholders, and a survey with evaluators, including members of the CES and other evaluation professionals. I utilized Yin's case study protocol for data analysis, following a two-step process: conducting individual analyses for each data source, and then integrating all data sources to provide a summary of themes related to the impact of evaluation professionalization in Canada on the position of evaluation, the practice of evaluators, and their employability. Regarding the analytical methodology, I adopt both quantitative and qualitative techniques to gain a holistic understanding of the data. Quantitative analysis helps me identify trends and patterns, while

qualitative analysis delves into the nuanced meanings and interpretations of the collected data. For presenting my findings, I ensure a clear and coherent narrative that effectively communicates the research outcomes to the audience.

This study is informed by the use of two theoretical frameworks to make sense of the data. Firstly, I adapt the classification and framing theory by Bernstein (1973) as a lens to categorize and interpret the knowledge, skills, and competencies within the research context. This framework enables me to uncover potential challenges and opportunities in credentialing processes, providing insights into the dynamics of qualification systems. Secondly, I integrate the "Use, Exchange, Knowledge, and Self-actualization" framework, inspired by works from Gopinath (2020), Machell & Saunders (2012), Neto (2015), Oughton (2010), Fuller (1994) and Yan and colleagues (2016), to gain deeper insights into how qualification approaches influence knowledge utilization, skill development, and the self-fulfillment of professionals. By incorporating these two theoretical frameworks, I aim to enrich my understanding of evaluative practice as it seeks to define itself as a profession and its impact, contributing to its standing in the field.

Combining my pragmatic worldview, diverse data collection methods, mixed analytical approaches, and the use of two theoretical frameworks to organize the current chapter, this chapter lays the groundwork for a comprehensive exploration of my research topic and sets the stage for the subsequent analysis and discussion. Chapter 4 overviews the study findings and these frameworks will be used in Chapter 5 to interpret the findings.

Chapter 4: Findings

This chapter presents the study findings organized by key themes to address the overarching research question, *What has been the impact of evaluation professionalization in*

Canada as enacted through the PDP (CE designation) offered by the Canadian Evaluation Society on the positioning, practice, and employability of evaluators? The progressive focusing of the research, which addressed the concepts of professional, professionalization, competencies and then credentialization provides the framework supporting the themes of responses. It should be noted that the findings are the perceptions of the impact by the group of evaluators (Canadian and non-Canadian), who discuss the notions of profession and professionalization and ascribe the concepts meaning. The attributions of meaning and themes emerging from the analysis are identified along with supporting evidence from the multiple sources of data.

Figure 2 provides an overview of the organizing structure for the subsequent sections by representing the relationship between the three key themes and subthemes.

Figure 2

Summary of Key Themes and Subthemes

INFLUENCE OF CANADIAN EXPERIENCE	STATUS OF EVALUATION AS A PROFESSION	CONCEPT OF 'PROFESSIONAL EVALUATOR'	PROFESSIONALIZATION OF EVALUATION	VALUE OF CREDENTIAL
BEING A CANADIAN EVALUATOR ALTERS EXPERIENCE AND UNDERSTANDING	PRACTICING IN EVALUATION REQUIRES FORMAL EDUCATION OR TRAINING TO LEARN	KNOWLEDGE OF EVALUATION	PROFESSIONAL IDENTITY	RECOGNITION OF COMPETENCE
INCREASING STRENGTH OF SUPPORT FOR PROFESSIONALIZATION APPROACHES	PRACTICING IN EVALUATION REQUIRES UNIQUE SKILLS, KNOWLEDGE OR COMPETENCIES	DEDICATED WORK IN THE FIELD OVER MANY YEARS	PROFESSIONALIZATION APPROACHES	OPPORTUNITY TO REFLECT ON PRACTICE
DIFFERENCE BETWEEN CANADIAN AND INTERNATIONAL PERSPECTIVE	PRACTICING IN EVALUATION MEANS PROVIDES A SPECIFIC SERVICE, GUIDED BY PROFESSIONAL ETHICS AND SOP	TECHNICAL SKILLS AND SOFT SKILLS		ADVANCES PROFESSIONALIZATION OF THE EVALUATION FIELD
	PRACTICING IN EVALUATION CONNECTS LIKE-MINDED COLLEAGUES THROUGH DEFINED PROFESSIONAL ASSOCIATIONS	CONTRIBUTION TO EVALUATION COMMUNITY		ENCOURAGES PD AND CONTINUING ED
	PRACTICING IN EVALUATION CONNECTS LIKE-MINDED COLLEAGUES THROUGH COP	APPLICATION OF SOUND EVALUATION PRACTICES		PROVIDES INCREASED OPPORTUNITIES FOR EMPLOYMENT
	EVALUATION IS NOT STANDARDIZED	FOLLOWING STANDARDS		UNCERTAINTY OF TANGIBLE VALUE
	EVALUATION DOES NOT REQUIRE PROLONGED, DEDICATED STUDY AND CAN BE DONE WITHOUT CERTIFICATION	PD AND CONTINUING EDUCATION		
	EVALUATION IS NOT REGULATED			

For each section, I first describe the theme and present the findings organized by subthemes and key findings.

Theme One: Influence of Canadian Experience

First, before outlining the findings from the perceptions of evaluators, I will discuss my understanding as a researcher that contributed to the first theme, the influence of the Canadian experience. As outlined in the methodology chapter, I am a researcher who is a Canadian evaluator and have grown through my career in the confines of the socially constructed Canadian system of evaluation. Approaching this project, one of the most unique learning points was associated with the inherent challenge of addressing the assumptions I had made as an evaluator based on the context I experienced. Akin to the social constructions and environmental contexts that humans are exposed to that are important for their development, so is the environment and contextual development for career. In the way I approached the project, I took care to leave my unconscious bias behind and examine the issue from a multidimensional approach.

That said, what I discovered through this process of research was the influence of the context and environment of the Canadian experience of evaluation professionalization. The Canadian evaluator experience is unique and different from other areas in the world because the CE designation exists and is part of the socially constructed fabric of being an evaluator in Canada. That is, students or emerging evaluators are socialized through universities, employers or the CES about the evaluation credential and supporting competencies and ethical frameworks. Without being aware of it, as I fell into the evaluation field, I was consistently exposed to and socialized within this context and the environment of professionalization and what it means to be an evaluator. I became aware of and was then encouraged by university professors, employers, peers, mentors, and other members of the CES to both join the society as a member, contribute to

the society through projects and board appointments, and obtain the CE through CES. My

understanding of the profession, professionalization and the credential were largely influenced

and guided by the environment of the status of evaluation in Canada. It has been an illuminating

challenge to deconstruct the assumptions I had made as an evaluator and work to reorient myself

more openly through the literature and perceptions of evaluators. It is important for me to relay

that experience as it links to one of the key thematic findings of this research, outlined below that

emerged through the data analysis.

Being a Canadian Evaluator Alters Experience and Understanding

Similar to my own journey examining the environment of evaluation and my construction

of it, throughout the research a theme that emerged consistently from evaluators was that the

Canadian experience is unique - simply as a function of being an evaluator in Canada inherently

alters the experience and understanding of professionalization. I spoke with over 20 evaluation

stakeholders from Canada, representing the CES board, general CES members or non-CES

member Canadian evaluators, and received over 354 completions from a survey distributed to

CES mailing lists and posted on social media. A key finding that emerged through all sources of

data was simply as a function of being exposed to the Canadian system (evaluation qualification

as a voluntary designation) – Canadians spoke differently in their framing of evaluation,

professionalization and what it means to be a professional. Through their discussions or ratings

through the survey of the status of evaluation, what it means to be an evaluator, key traits of

evaluation professionals and their experience with the Canadian approach to professionalization,

they used the Canadian approach in their discussions as the benchmarked framework for

evaluation professionalization. Most individuals I talked to spoke positively about qualification

approaches to evaluation through a credential, if not for individual gain but rather for the status

of the professional field itself. Even those who did not speak favorably of the credential or were

unsure of the value of the credential couched their responses in language and examples that

highlighted the Canadian approach to professionalization as a framework for evaluation

professionalization.

For example, when being asked to describe an evaluator that was "professional" – the

Canadian evaluators, in contrast with those who were non-Canadian, provided immediate

examples of a "professional" being someone who follows the Canadian ethical framework, the

Canadian competencies or has the evaluation designation. They also talked about the traits that

they or other evaluation professionals possess as related to the Canadian approach. As one

Canadian key informant noted when describing what it means to be a professional evaluator:

"somebody who is connected to CES – I see it as a responsibility and imperative to advance our

society – someone who is active in CES". Another key informant commented that a professional

evaluator needs to have capacities and competencies and that "we have done a good job at CES

of outlining those competencies. A professional evaluator – obviously they have to be critical,

they have to be rational, they have to be seeking some kind of truth and do this in alignment with

our ethical framework.". A survey respondent noted a professional evaluator was someone with

"significant experience in the field of evaluation and who embodies the CES competencies". In

this way, participants without realizing it, were applying the Canadian social construction of

what evaluation as a profession means and what it means to be a professional evaluator

consistently and significantly throughout the data collection. The perceptions of evaluators who

responded to the surveys and key informant interviews were heavily influenced by the Canadian

context of professionalization, which is arguably more rigid and well-defined than in other

jurisdictions. Equally, those who were non-Canadian and not as familiar with the Canadian

approach to professionalization often referenced competency frameworks, if they existed through

their professional associations, but did not seem as strongly tied to those frameworks when

describing evaluation as a profession or the traits of professional evaluators. When describing a

professional evaluator, an international key informant talked about ethics but without referencing

specific frameworks: "They are ethical, that is an important starting point, people who are non-

evaluators often aren't. I know so many competent evaluators, they are ethical, they know their

profession, they make a point about constantly learning more about their profession and I find

evaluators to be quite collaborative.". Another noted "the people that I particularly admire and

hear, listen and work with are the people who have a command of all of that expertise and are

thinkers who are looking to explain and understand what is happening within and have a

combination of intelligent analysis and methodological expertise.". In this way, non-Canadian

evaluators talked more broadly about the skills and traits of what it means to be a professional

evaluator and the status of evaluation as a profession without using a socially constructed

framework to do so. It was clear the influence of the Canadian approach to professionalization

was well socialized amongst Canadian evaluators and they referred to the Canadian components

of the professionalization process like the Canadian ethical guidelines, competencies and

credentialization process often through their perceptions.

Increasing Strength of Support for Professionalization Approaches

Another subtheme that emerged through the thematic analysis of the key informant

interviews and survey was that evaluators increased their strength of support for the Canadian

qualification based on CES membership and holding the designation. This meant that agreement

with professionalization and qualification approaches to professionalization increased in strength

or agreement among the perception of evaluators based on location of the evaluator, CES

membership status and CE designation status. That is, Canadian CES members who held the CE

designations agreed most strongly with evaluation professionalization efforts and the value of

qualification approaches to professionalization, followed by Canadian CES members, Canadian

evaluators, and then international evaluators (non-CES members, non-CE designated).

The survey on professionalization was sent through CES communication pathways and

posted on social media. Non-CES member evaluators could complete the survey, and some did

from various other international jurisdictions. I also spoke with both Canadian and non-Canadian

evaluators through key informant interviews. Although retrospectively, what could be a logical

conclusion is that results demonstrated increasing strength in agreement about the utility, impact

and value of the credential from non-CES members to CES-members to CES-members who have

the credential. Those who have the credential were very positive about the approach to

professionalization – demonstrating the Canadian system itself heavily influences Canadian

evaluators (as one may expect).

All respondents were asked if they were members of the CES. The majority of

respondents (86%) indicated they were – which reflects the intentional distribution of the survey

directly to CES members. If respondents noted they were members of the CES (n=279), they

were asked for how long. Respondents most frequently selected 10+ years (40%), followed by 5-

9 years (25%) and 1-4 years (23%). When disaggregated by CE designation, those that indicated

they had the CE designation, had been members of CES for longer than those who did not (62%

being members for 10+ years).

Figure 3

Length of CES membership by CE designation Status

How long have you been a member of the Canadian Evaluation Society?

	Less than a year	1-4 years	5-9 years	10+ years	I don't know
CE Designation (n=123)	1%	8%	28%	62%	2%
Non-CE Designation (n=121)	19%	33%	25%	20%	3%
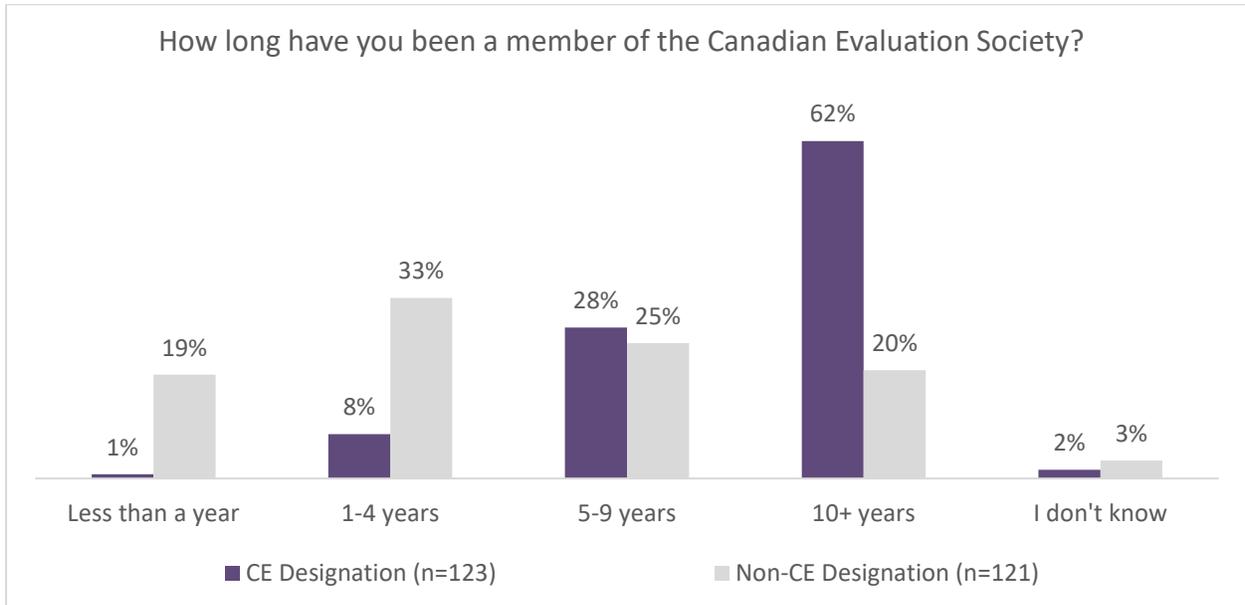
Respondents in the survey and in key informant interviews were asked if they had the CE designation. For those that completed the survey, about half noted they did (47%) and 53% did not. Those that had the designation had had it for a fair amount of time.

Figure 4

Length of CE Designation Status

How long have you held the CE designation? (n=121)

| Less than a year | 1-4 years | 5-9 years | 10+ years | I don't know |
| 2% | 28% | 36% | 32% | 2% |
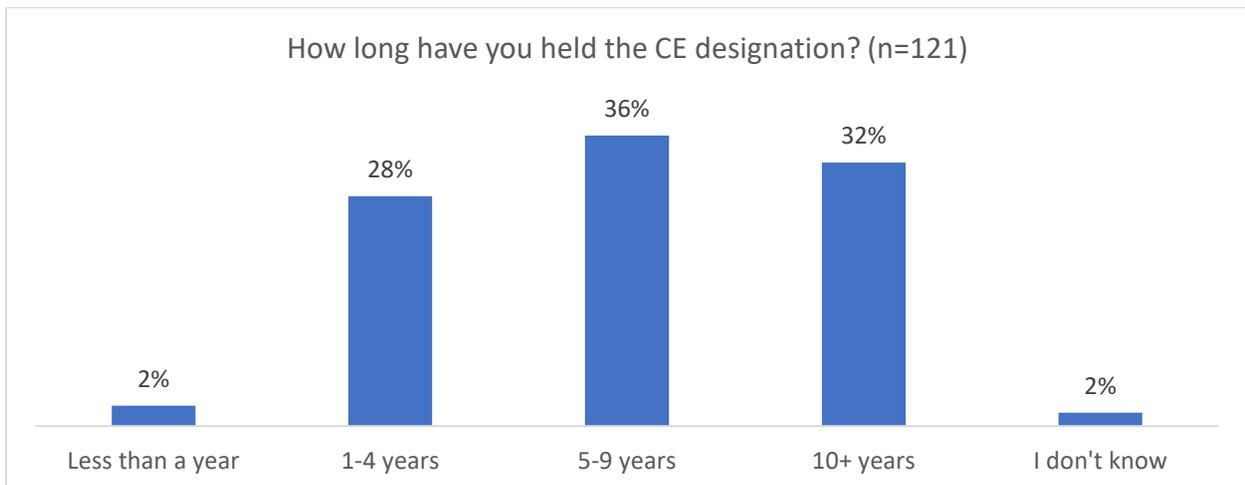
Narrowing the focus further from evaluation as a profession and kinds of traits or "what it means" to be an evaluator to credentialing as a mechanism of professionalization, respondents were asked if they were aware of the CES CE designation, the designation created by the CES to assess competency, education and practice as a qualification approach. Based on their response, they were then asked a series of questions about qualification approaches. The majority of survey respondents were aware of the CE designation (92%), as were all of the key informants (international and Canadians). When asked about the CE designation or qualification approaches, respondents were observed to have increasing strength of agreement with the statements based on CES membership status and CE designated status. The majority of respondents agreed that the CE designation is important for CES to have (71%), contributes to more professional evaluators (63%), makes an evaluator more credible (70%), and positively impacts the evaluation community (69%). Fewer respondents agreed that the CE designation makes an evaluator more employable (54%) or positively impacts the evaluation community internationally (49%).

When disaggregated by CES membership, CES members were more likely to respond positively about the credential – noting it is important for CES to have, contributes to more professional evaluators, makes an evaluator more credible, employable, and positively impacts the evaluation community in Canada. However, CES members and non-members responded similarly about the impact on the evaluation community internationally. In addition, those who had a CE responded even more positively on all dimensions than those without a credential as outlined in the charts below.

Figure 5

Contribution to Professional Evaluators by Membership Status

Contributes to more professional evaluators.

- CES Member (n=276)
- Non-CES Member (n=44)

	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree	Don't know
CES Member	3%	10%	16%	35%	31%	5%
Non-CES Member	14%	19%	24%	19%	10%	14%
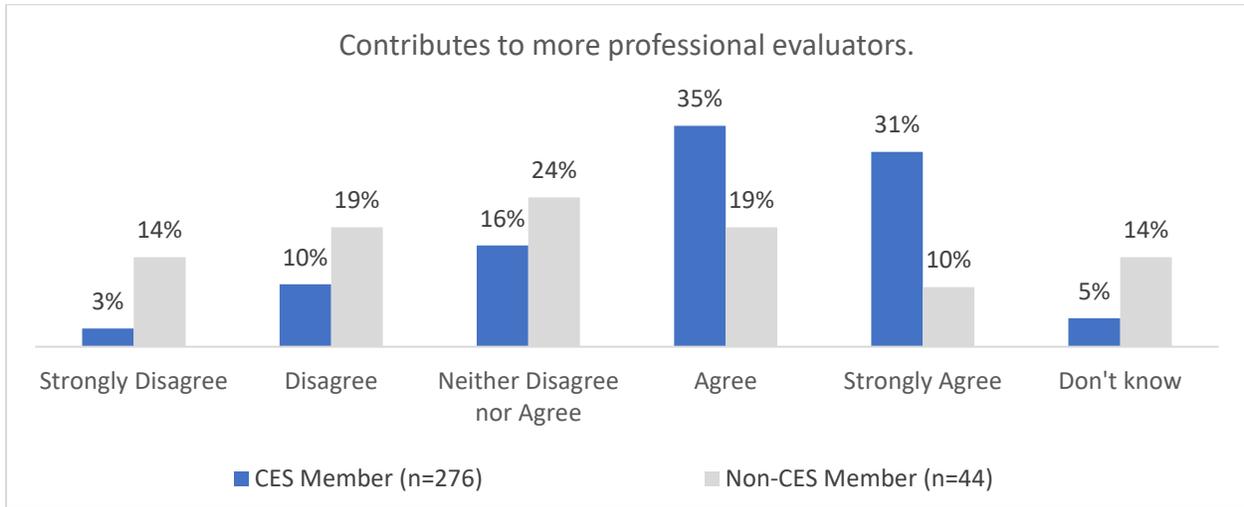
Figure 6

Contribution to Professional Evaluators by Designation Status

contributes to more professional evaluators.

- CE Designation (n=122)
- Non-CE Designation (n=142)

	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree	Don't know
CE Designation	2%	7%	12%	27%	47%	4%
Non-CE Designation	5%	14%	21%	40%	14%	6%
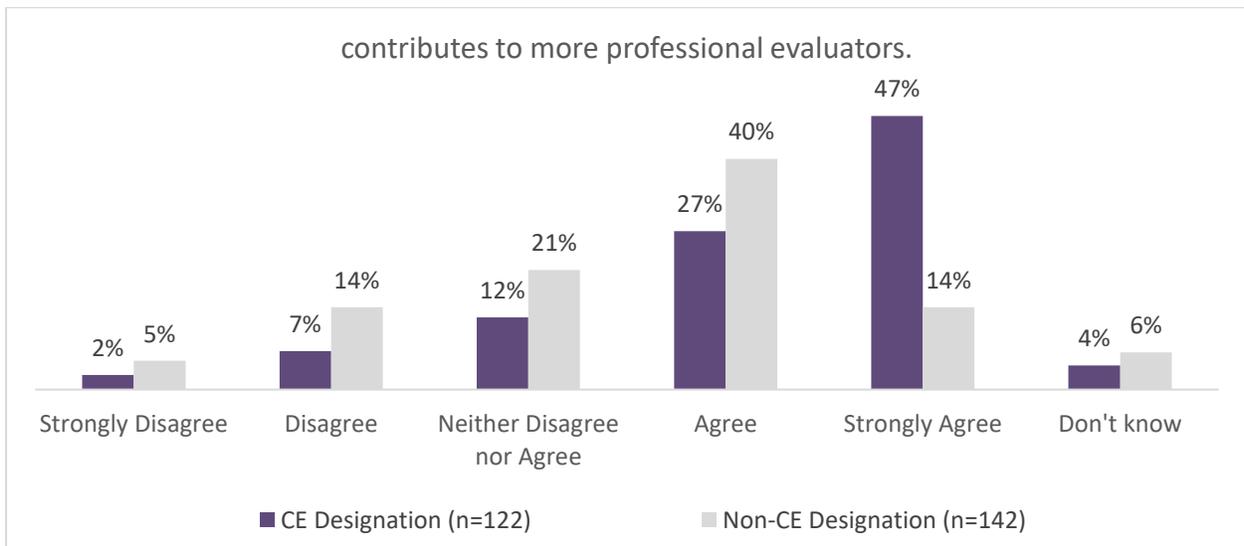
Figure 7

Positive Impact on Evaluation Community in Canada by Membership Status
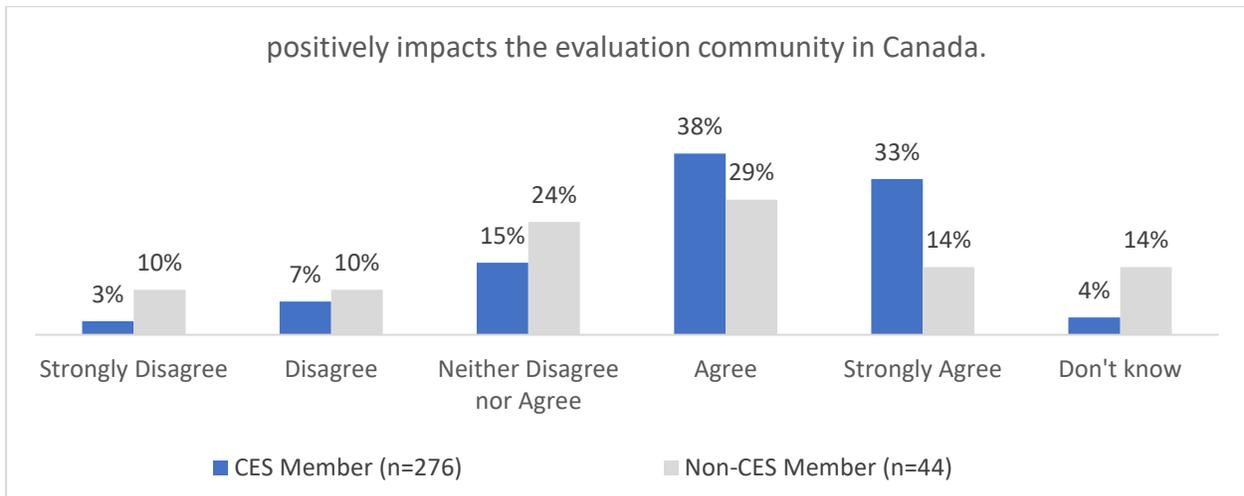
Figure 8

Positive Impact on Evaluation Community in Canada by Designation Status
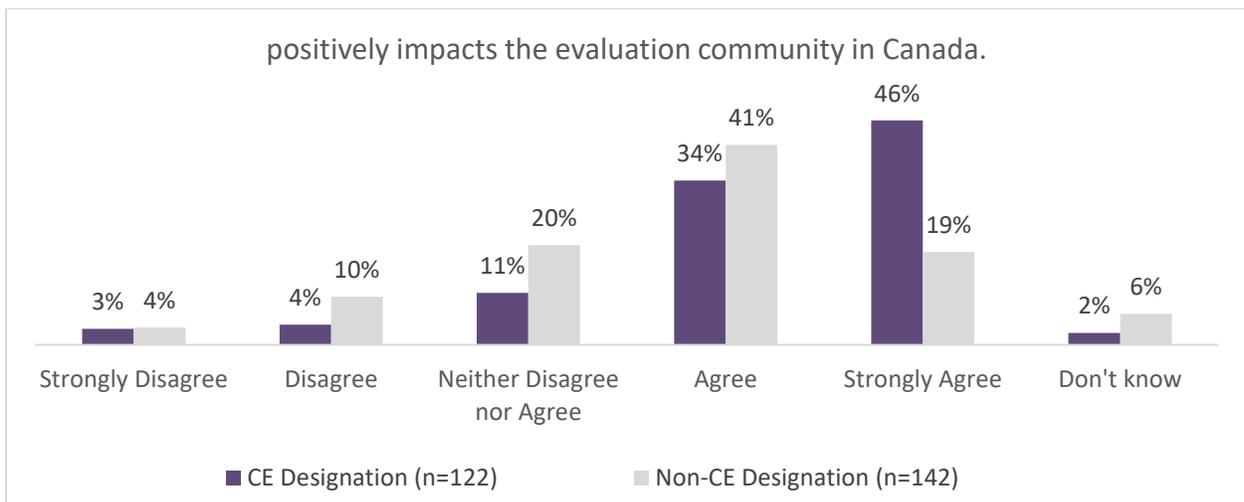
Not only was the increasing strength of agreement with the approaches to professionalization observed through survey responses, in key informant interviews, respondents spoke with increasing support to the approaches through their comments and feedback. International key informants were notably more skeptical about professionalization and qualification approaches to evaluation than Canadian evaluators or CE designation holders. As

one international key informant shared: "Of course, when you say professionalization, it means improving the quality of evaluations – no one says no to that. But when you talk about how to improve the quality, opinions differ.". Another noted they "don't prefer certifications, I always try to make counterfactual evaluation methods – within evaluation communities". Another international key informant noted "it is a labour of love – you have to be passionate to take this forward, it is not going to happen tomorrow, it is going to take decades to say, "I am evaluator" and someone gets what that is. Do I feel that we should be spending our time on that as evaluators – not necessarily.". Whereas the Canadian key informants leaned into the concepts of professionalization more emphatically and directly. One key informant commenting:

> I have a CE– so I overall am in support of the credential and way of credentializing – it has value for people who want to hire evaluators to have some sense that someone knows what they are doing — it is not a perfect system, there are some amazing evaluators who do not have a CE. It is one thing to try and build the profession and help people have an idea of being a decent evaluator.

Another noted:

> We – people doing evaluations, owe society a mechanism where we can – not guarantee but at least promise to do good work. Where we can define what good work should entail, what they can expect, what structures are in place to ensure we as evaluators stay on that road. We have to have – I feel, if we want to professionalize evaluation, we have to start putting those parameters in place.

Another shared: "If you want to professionalize something it cuts across so many domains and it is about trying to reach the optimum with what it can be and what can be delivered and also within a safety nets, so that there is some trust in what constitutes evaluation and an evaluator.".

Another commented about their experience: "My perspective – I do absolutely think we need professionalization for exactly the reason that anyone can say they are – what makes it definite. I am proud of that designation. There is that sense of having a professional identity.". Another noting "I am in favour – I think that it is helpful for the field to be able to define itself as a distinct field by having a credential. I know there is a distinction between levels of professionalization – you have certification and credentials."

Difference Between Canadian and International Perspective

Through the analysis of key informant interviews and survey responses, what became clear were that international evaluators were more variable in their definitions and more accepting of alternative approaches than Canadians. International approaches to professionalization are varied, but all generally have consensus on the most important elements of evaluation practice as being reflective and skill based. The Canadian case is a visible and defined approach to professionalization that does not exist in other jurisdictions. In the absence of qualification as a framework for professionalization, international stakeholders were more variable in their definitions of professionalization and wider in their understanding of what it means to be a professional. They also provided more reflective commentary on the debate, insight that was not positioned through the Canadian discussions. Although postulative and variable, international stakeholders all generally had consensus that knowledge, skill, and reflection were key elements of evaluation professionalism. When asked about what a "professional" evaluator looks like, non-Canadians rarely referenced ethical frameworks and competencies as the Canadians did and instead spoke of extensive knowledge, skill, and reflective practice as what it means to be a professional. As one key informant noted: "a competent evaluator is someone who learns, who has a lot of knowledge and skill in evaluation

and thinks about how they can be constantly improving". Another international key informant

noted they were:

> agnostic about [professionalization] – because of my concerns with a prescriptive approach
>
> and threat to making meaning and understanding in what we do. I am in a minority of people
>
> in professionalization. But the professionalization would encompass not just technical
>
> competence, a really important part of it is one is ethics and values.

Another noted that "Of course, when you say professionalization, it means improving the quality

of evaluations – no one says no to that. But when you talk about how to improve the quality,

opinions differ". In many ways the international stakeholders provided a softer response to the

key features of evaluation professionalization – preferring variability.

Similarly, international stakeholders rarely saw a need for professionalization through

qualification approach to evaluation and instead focused on embracing diversity in evaluation

background, learning the appropriate knowledge and skills, and approaching projects with

competence. When asked about the qualification approach or Canadian designation, most

stakeholders were familiar with it but wondered about relevance to the field as whole (a largely

non-Canadian, global profession in terms of numbers). As one international key informant noted:

"in an informal way, there was a discussion about certifications about evaluators, but it begs the

problem, who has the authorization to certify and it could cause some tensions in the evaluation

community – it is in more an informal way, organizing discussion and workshops introducing

evaluation methods, teaching younger evaluators'.

Summary

Findings that emerged through the data collection identified a key theme about the

influence of the Canadian experience on perceptions of evaluation professionalization. In

particular two subthemes indicated that simply being part of or being socialized as a Canadian evaluator inherently influenced perceptions of evaluation professionalization and that being a CES member of having the credential increased the strength of support for professionalization approaches, including qualifications. Equally, the difference between the Canadian experience and the international perspectives were stark. In particular, international evaluators provided more variability in their definitions of evaluation professionalization, what it means to be an evaluation professional or an evaluator in general than the Canadians. They also were less likely to agree with or recommend a qualification approach.

Theme Two: Status of Evaluation as a Profession

The first dimension of the progressive focusing of the research was to understand participants" perceptions of the status of evaluation as a profession. In both the survey and the key informant interviews, Canadian and non-Canadian evaluators were asked a series of questions about the profession of evaluation. The survey and key informant interviews asked, "thinking about other professions like doctors, teachers, or lawyers, would you describe evaluation in the same sense, a profession?". Overall, 61% of all respondents to the survey (n=320) indicated that evaluation is in the same sense a profession (39% indicated it was not). When disaggregated by CES membership status, more CES members agreed evaluation was in the same sense a profession, and when disaggregated by CE designation status (whether participants had the CES CE designation) the same amount agreed.

Figure 9

Status of Evaluation as a Profession

Thinking about other professions like doctors, teachers, or lawyers, would you describe evaluation in the same sense, as a profession?

62%

38.4%

55%

45.5%

CES Member (n=276)   Non-CES Member (n=44)

■ Yes   ■ No
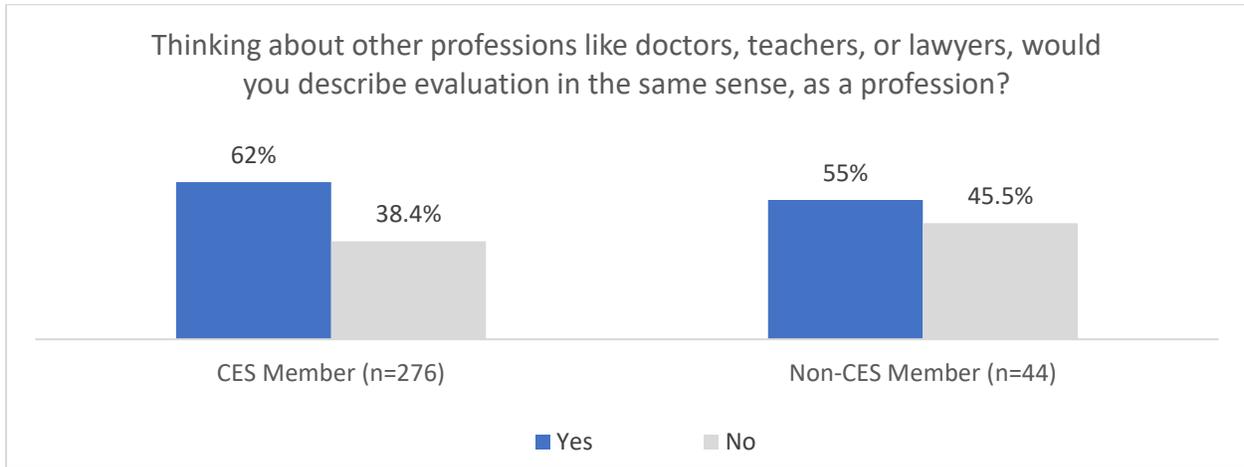
Figure 10

Status of Evaluation as a Profession by Designation Status

Thinking about other professions like doctors, teachers, or lawyers, would you describe evaluation in the same sense, as a profession?

62%   58%

Yes

38%   42%

No

■ CE Designation (n=122)   ■ Non-CE Designation (n=142)
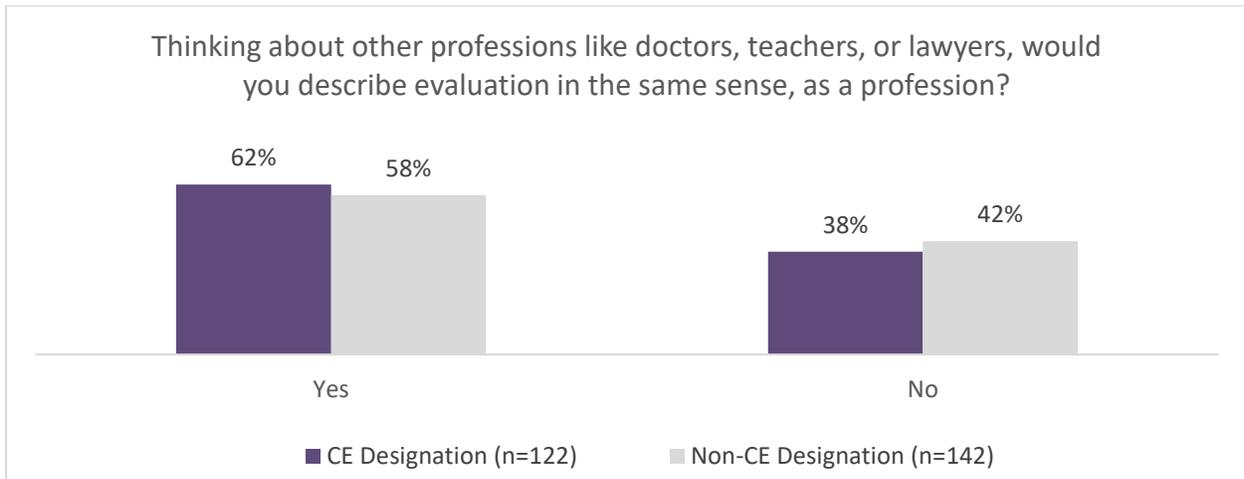
Survey respondents after being asked qualitatively how evaluation is a profession, were asked to identify the features of a profession that evaluation has. The majority noted there are well-defined skills and knowledge required (89%), a set of competencies for the profession (86%), guidance on ethical conduct (83%) and a definition exists for the profession of evaluation (70%). Although the majority agreed, fewer respondents identified the following features of the profession: standards that outline the minimum quality (63%), there is a professional identity or

traits for evaluators that are easy to describe (57%), and there are well understood professional

practices (52%).

Figure 11

Features of Profession Evaluation Has

What features of a profession does evaluation have? (n=184)

Feature	%
A definition exists for the profession	70%
Well-defined skills and knowledge required	89%
Professional identity or traits of those practicing the profession that are easy to describe	57%
Well-understood professional practices	52%
Set of competencies for the profession	86%
Standards that outline minimum quality standards for the field	63%
Guidance on ethical conduct	83%
Regulation of the profession	17%
Other (please specify)	5%

When comparing CES members to non-CES members, generally speaking the CES members

more strongly agreed that evaluation had the various features of a profession than non-CES

members.

Figure 12

Features of Profession Evaluation Has by Membership Status

What features of a profession does evaluation have?

Feature	CES Member (n=276)	Non-CES Member (n=44)
A definition exists for the profession	72%	57%
Well-defined skills and knowledge required	90%	81%
Professional identity or traits of those practicing the profession that are easy to describe	57%	52%
Well-understood professional practices	53%	43%
Set of competencies for the profession	90%	52%
Standards that outline minimum quality standards for the field	65%	48%
Guidance on ethical conduct	85%	71%
Regulation of the profession	16%	24%
Other (please specify)	6%	5%

There was even more agreement on the features of a profession evaluation has when CE designated members were compared to non-CE holding evaluation practitioners.

Figure 13

Features of Profession Evaluation Has by Designation Status

What features of a profession does evaluation have?

| Feature	CE Designation (n=76)	Non-CE Designation (n=82)
A definition exists for the profession	78%	72%
Well-defined skills and knowledge required	92%	87%
Professional identity or traits of those practicing the profession that are easy to describe	62%	55%
Well-understood professional practices	62%	44%
Set of competencies for the profession	95%	85%
Standards that outline minimum quality standards for the field	74%	60%
Guidance on ethical conduct	93%	78%
Regulation of the profession	14%	16%
Other (please specify)	8%	5%

■ CE Designation (n=76)   ■ Non-CE Designation (n=82)

If respondents in the survey and key informant interviews agreed evaluation was in the same sense a profession, were asked how. They provided both quantitative (survey) and qualitative (survey and interviews) responses. Respondents offered the following themes of responses about how evaluation is a profession which helps us understand the current status of evaluation as a profession in Canada as perceived by respondents.

Practicing in Evaluation Requires Formal Education or Training to Learn

Respondents noted that to practice evaluation, one cannot just "do" evaluation without some formal educational opportunities or exposure to learn the skills (e.g., what is a logic model, how to assess outcomes, frameworks, and theories). They noted that because of this, evaluation

was a profession. As one survey respondent noted "[evaluation] requires education and experience to develop knowledge, skills and attributes." Another survey respondent commented that "it requires a base university degree and then workplace experience and on-going training and skill development.".

Practicing in Evaluation Requires Unique Skills, Knowledge, or Competencies

Respondents commented that evaluation has a set of defined or required skills that are unique to the profession. They noted there was a framework that is followed for evaluation in the way that a doctor or lawyer would follow a process, customized to each patient or client. They noted that evaluation required an extensive amount of knowledge to be completed appropriately. As one survey respondent said "[evaluation can be defined as] an occupation, trade, craft, or activity in which one has a professed expertise in a particular area; a job, especially one requiring a high level of skill or training" Another survey respondent observed "I think it can be both. I think people can use evaluation in parts of other roles, but I also think that evaluation can be its own profession because to do it well it requires a comprehensive amount of knowledge and experience and a specialty in evaluation." Another survey respondent commented that "The role we play and the tasks we conduct are very specific and different than those of our colleagues or clients and they require a special set of skills and resources that are different then program management or administration." Another survey respondent said that "In the sense that it is a field of work that requires education, practice and specific skill sets and competencies. It is a service and one can develop a practice base that informs and theory and development of the field". A key informant commented: "There [is] a particular set of skills and knowledge that [are] being required for evaluators to be called evaluators'. Another key informant noted: "But if you look at it as an entity that has a very clear body of knowledge where you have focused research –

you have structure expectations, ethical practice or guidance then it is a profession, and it is in an interesting way across disciplines and that has it has developed.".

Practicing in Evaluation Means Providing a Specific Service, Guided by Professional Ethics and Standards of Practice

Respondents commented that evaluation requires delivering a service and is guided by professional standards and ethics. Respondents commented that specifically within Canada, there are sets of evaluation standards that have been adopted as well as an ethical framework. By having set standards and a guiding ethical framework, respondents agreed that evaluation was thereby a profession. As one survey respondent commented, evaluation is a profession because "It provides a specific type of service and is guided by professional standards, ethics, and competencies." Another noted: "There is a set of skills and methodologies unique to evaluation, and evaluation fulfills a formal accountability function (in organizations that have an evaluation policy), in addition to being a recognized way for work teams/managers/organizations to gain strategic insights." Another survey respondent commented:

It is a role that requires specific education and experience and performs a specific set of tasks. It has a regulatory body (although optional). There is ongoing professional development to keep up with changes in the field. And people in my organization often say, "Hey! I wish we had an evaluator!".

Another respondent noted as a profession: "It's similar in that there are professional standards and education but it's also a specialization. The profession may not be well understood by general public, however." A key informant said:

It was basically assumed if you have a social sciences degree, you can do literature reviews and interviews. We became much more aware that there were real competencies required to

do good evaluation – by bridging the models and theories to the notions of competencies now

we can talk more of a profession. You can start to really think about evaluation as something

distinct.

Practicing in Evaluation Connects Like-minded Colleagues Through Defined Professional

Associations

Respondents noted that evaluation societies and associations of members existed around

the world, including the CES, which provide a hub for like-minded individuals to connect on

their profession. In many ways, participants discussed the emergence of communities of practice

through professional associations, societies, groups, or networks as a professional support. The

purpose of the network is for people to come together to produce evaluation knowledge, develop

evaluation related skills and deliver evaluation products and services. By having organizations

focused on evaluation as a profession, evaluation itself or "being an evaluator" were then a

profession. As one survey respondent noted:

> For many reasons: evaluation specific organizations exist with evaluator jobs as a primary
>
> work area, there are requirements by policy and act to evaluate programs and spendings, there
>
> is a society in Canada and others abroad, in Canada we have the Credentialed Evaluator
>
> designation, and a system of mixed educational programs and courses dedicated to evaluation.

Another survey respondent commented: "We have a community of practice, standards, and a

core way of working that is the same in any workplace you might practice evaluation in." A key

informant noted:

> I think its similar in that we have a practice that we do, you have nursing practice, and you
>
> have your evaluation practice – not solely an academic practice, there is a community – there

is a society, there are conferences there are people identify as a profession, we have

competencies that say you have to do these things to be this profession.

Respondents in the survey and interviews addressed the status of evaluation as a

profession as a function of the number of accompanying societies and associations that exist to

support the practice of evaluation. As a component of the research, a desk review of international

evaluation associations was completed, including accompanying literature to understand the

status of the profession internationally. Although many evaluation societies, associations or

working groups exist, the true number is not collated in one place as new organizations continue

to be formed and existing ones merge or dissolve over time. This research focused on the larger

evaluation associations well known and visibly identifiable to the field through literature and

search databases (e.g., CES, EES, AEA, AfrEA, UKES). Through this review, in alignment with

respondents" perspectives, the evaluation associations or societies represented a like-minded

group of individuals coming together under a collective mission, vision, values and in some

cases ethics and competency frameworks focused on evaluation practice. For example, the

mission of the EES is to "stimulate, guide and promote the theory, practice and utilization of

evaluation in Europe and beyond" (EES, 2023). Similarly, part of AEA's mission is to "promote

evaluation as a profession" (AEA, 2023), the UKES "support the future of evaluators by

promoting and improving theory, practice, understanding and utilization of evaluation" (UKES,

2023). In all cases during the review, the evaluation societies, and associations referred to a

collective vision and the organizations were designed to support the professional practices of

their members.

Although the majority of respondents to the survey and to the key informant interviews

did agree evaluation had dimensions of a profession, some indicated it did not constitute a

profession. If respondents noted no, evaluation was not in the same sense a profession through

the survey (39%) or interviews (n=4 international, n=1 Canadian KI's, n=4 yes and no or "don't

know), respondents were asked: *"How is evaluation in the same sense not a profession?"*. They

were also asked to quantitatively identify through the survey the features of a profession

evaluation is lacking and most often indicated regulation of the profession (69%), a professional

identity or traits for evaluators that are easy to describe (54%) and well understood professional

practices (50%). Fewer respondents noted the profession was lacking standards that outline the

minimum quality (47%), well-defined skills and knowledge required (38%), a definition for the

profession of evaluation (31%), a set of competencies for the profession (20%), or guidance on

ethical conduct (16%). When disaggregated by CES membership, results were fairly consistent,

however more CES members indicated the profession was lacking well-understood professional

practices (54% of CES members compared to 29% of non-CES members).

Figure 14

Features of Profession Evaluation is Lacking by Membership Status

What features of a profession is evaluation lacking?

| Feature	CES Member (n=276)	Non-CES Member (n=44)
A definition exists for the profession	31%	29%
Well-defined skills and knowledge required	37%	41%
Professional identity or traits of those practicing the profession that are easy to describe	55%	47%
Well-understood professional practices	54%	29%
Set of competencies for the profession	19%	29%
Standards that outline minimum quality standards for the field	47%	47%
Guidance on ethical conduct	14%	24%
Regulation of the profession	70%	65%
Other (please specify)	24%	12%

When disaggregated by CE designation status, fewer respondents with a CE noted evaluation was lacking features as a profession when compared to CE membership and overall respondents.

Figure 15

Features of Profession Evaluation is Lacking by Designation Status

The following themes emerged through the survey and interview responses that contribute to our

understanding of the status of evaluation as a profession as perceived by practitioners.

Evaluation is Not Standardized

Respondents noted that evaluation is not standardized – although there are standards of

practice that exist in some evaluation societies, there is not a college that outlines the specific

standards of practice. In addition, evaluators practice in different ways, based on their education

and without specific checks and balances of a standardized route of training or competency

development. As one survey respondent noted: "There isn't much standardization in terms of

evaluator roles and responsibilities. Even titles can be wildly inconsistent. CES has defined

competencies, but I don't think the same can be said for evaluation associations outside of

Canada". Another commented: "Because anyone can become an evaluator without necessarily

studying in that field. It is more a matter of skills, and a lot of evaluation skills can be acquired

through a wide variety of experience". An international key informant noted: "a lot of the

fundamentals are there. Although, I don't know if they can be graded the same way. The

audience for those professions has expectations about what would be delivered consistently – the

audience for evaluation have different expectations. The health sectors expectations are vastly

different from the human services." Another key informant from Canada commented: "Yes and

no – I think again when we think about professions in the legal sense, we are not a profession.

Society looks at that – there are standards, mechanisms of holding people responsible and

accountable and the colleges – so no, we are not a profession that way.".

Evaluation Does Not Require Prolonged, Dedicated Study and Can be Done Without Certification

Respondents noted that those who practice evaluation are not required to follow a

specific pathway and duration of study or assessment of competency and can do so without

certification or licensure. In addition, respondents often commented that with the practice of

evaluation, many evaluators "wind up" or "fall into" the profession from a variety of diverse

backgrounds. Respondents were quick to note that no one "winds up" a doctor, teacher or lawyer

– they follow a prescribed pathway which includes education, competency assessment, degree

attainment, licensure and regulation. As one survey respondent noted: "I think evaluation is or

can be a learned skill and does not require any specific academic training or certification."

Another commented: "Professionals take professional degrees - a lawyer takes a law degree, a

doctor takes a medical degree, a nurse takes a nursing degree. Evaluators come from all kinds of

educational backgrounds. Evaluation is more a skillset." Another survey respondent noted: "These professional positions have standardized exams and accreditation boards. Evaluation has that too but the professions are connected to an educational institution" A survey respondent indicated:

I have never heard of a doctor, teacher, or lawyer who just showed up on the job one day as a doctor, teacher, or lawyer with absolutely no background or experience in those professions. Myself and all my colleagues in my evaluation department became evaluators with no formal training or experience. So while I would say it is certainly a profession, it's not in the same sense as the three given examples in the survey.

Another survey respondent indicated:

Had there been a middle option (i.e., "sort of like those other professions") I would have picked that. It has common underlying skills, professional bodies, literature. It's not as clearly defined as a teacher or doctor; the curriculum isn't as set. You can "wind up" in evaluation, but rarely wind up a doctor.

As a key informant noted:

[We are missing the] legislative component… you cannot call yourself an MD if you do not have a license from the college, you cannot call yourself a nurse without a license, so you cannot do those jobs, but here you can. Ours is a voluntary designation, we are saying if a person has demonstrated some competencies that they wrote down, and smart people have said yes – we do not certify or have exams.

Evaluation is Not Recognized by all Employers or the General Public

Respondents commented that evaluation as a profession is not recognizable by employers or the public, bringing into question its status as a profession. They noted that there was not

universally recognized expertise and discussed the varied backgrounds that evaluators could take

to end up in the professional area of practice. As one survey respondent commented:

> It's a wannabe profession but isn't quite there yet in terms of recognition and respect in the
>
> workplace. While our auditors and lawyers get extra training dollars for their PD, evaluators
>
> don't. I wish I had set hours that required me to "upkeep" my profession. Evaluations are very
>
> different levels of standards. An "evaluation" at a non-profit with a bare bones budget is very
>
> different than one with the administrative red tape of federal policies.

Another noted there was a "lack of universally recognized expertise". Another survey respondent

commented:

> I think it is in terms of being a field of practice that requires a set of skills, knowledge, and
>
> experience. But it's not regulated or professionalized as much as teachers" lawyers etc. in
>
> terms of standards unions etc. and also awareness of the general public about what it is.
>
> Whereas saying you are a doctor, teacher, lawyer to people is very clear, evaluation is more
>
> niche and less well understood in my experience. There may be standards, but they are not
>
> necessarily verifiable even with the CE which is more checkbox in my view and not reflective
>
> of quality and standards to the degree it could or should be.

Another survey respondent noted:

> To me, evaluation is definitely a profession but not in the same sense as doctors, lawyers,
>
> teachers, etc. as it is less defined. Saying one is an evaluator is more often met with blank
>
> stares or questions about what that means than conjuring a clear picture of what an evaluator
>
> is or does. There is also no clear educational path to becoming an evaluator, although the
>
> number of evaluation-related university programs is growing, and no required designation. All

of this is changing internally to the profession (among evaluators) but will take more time to be recognized externally by non-evaluators.

Evaluation is Not Regulated

Respondents noted that evaluation is not a regulated profession in the same manner that doctors, accountants, lawyers or otherwise are regulated through a college for their profession. Obtaining licensure or a certification into those professions means oversight of the practice, profession, and protection of the general public through licensure. As one survey respondent commented: "Its unregulated. Doctors, accountants, lawyers, etc. are regulated professions with accreditation that must be attained in order to use the title." Another survey respondent noted "you do not need a license to practice and there is no oversight body". A survey respondent commented: "The way that evaluation differs from the other professions mentioned is the lack of gatekeeping/regulation. While doctors, teachers, and lawyers cannot be employed under that title without meeting educational and other requirements, the same is not true of evaluators." Another survey respondent offered:

I would not necessarily compare evaluation as a profession to the examples that were provided - doctor or lawyer. Both of these professions require a licensure exam and supervised practice. Currently, the evaluation field does not have a licensure exam and the experience in the field does not have to be supervised by a credentialed or licensed professional. I am comparing this to being a registered psychologist whereby I needed a certain level of education, a certain number of supervised clinical hours that were signed off on, and I had to complete 2 licensure exams (one written and one oral).

Some respondents provided feedback on the profession and CES as food for thought, noting: "The set of competencies defined are vague and a mix of project management

competencies and applied research competencies. Interestingly, what distinguishes evaluation

from other disciplines (i.e., systematic conclusions about merit, worth and significance) are not

reflected in the CES competencies." Another indicated:

> I think CES has done a good job building a foundation for a profession. I think that more
>
> could be done to promote awareness of what evaluation is in the not-for-profit sector in
>
> particular. I think CES could go too far with professionalization. You want to build
>
> credibility, but not lock down the diversity of evaluation roles, perspectives, and practices.

Summary

Survey respondents, key informant interviews and the desk review of evaluation

associations reflected themes as to how evaluation is a profession and noted that evaluation

requires training and experience to learn, requires unique knowledge and competencies, is guided

by professional standards and ethics, and that networks of like-minded individuals who also

practice exist. As one respondent summarized: "In Canada, evaluation has: 1) A national body

(i.e., CES), 2) Sub-national bodies (i.e., CES Chapters), 3) Program evaluation standards, 4)

Ethics statement/policy, 5) Disciplinary knowledge (i.e., CJPE), 6) Graduate programs and

continuing education". Equally, respondents were also clear to discuss how evaluation is not a

profession and noted that this predominately came down to not having a universally understood

set of competencies from employers or the public in addition to lack of standardized education,

experience, practice, and lack of oversight. Respondents noted that in other professions, people

follow a prescribed pathway which includes education, competency assessment, degree

attainment, licensure, and regulation – which does not currently exist for evaluation.

Theme Three: Concept of "Professional Evaluator"

One of the other dimensions of the progressive focusing of the research included moving from evaluation as a profession to instead asking about the traits of evaluators or what it means to be a professional evaluator. A key finding of the research was themes around the concept of what it means to be a professional evaluator. Respondents, in both the survey and key informant interviews were asked to "picture in your mind someone that you have worked with who is a really professional evaluator. What makes them a professional evaluator?" Respondents provided comments on the following themes that contribute to understanding from the perception of evaluators, what it means for someone to be a professional evaluator.

Knowledge of Evaluation

Respondents commented that someone who is a professional evaluator has extensive knowledge of evaluation theory and methods. These individuals possess knowledge that informs their work and continue to seek knowledge to stay current on their skillsets. As one survey respondent noted: "Knowledge & skills which are applied to support learning, improvement and accountability . . . and help to make the world a better place". Another commented: "Knowledgeable about the history of evaluation, current practices, and the future of evaluation.". A key informant noted: "Certainly would have education that would support that, education in research methods, in evaluation specifically, professional development in ethics and understanding theory of evaluation and also being clear and confident in their own approach in their skills and their own perspective and how that influences it.". In many ways, respondents to the survey and key informant interviews identified that to be an evaluation professional, one had to have knowledge of evaluation and of evaluation theory and methods – as in one could not just start "doing" evaluation.

Dedicated Work in the Field of Evaluation Over Many Years

Respondents also noted that professional evaluators were people who had extensive experience in the field through dedicated and long-term tenure of work. They commented on professional evaluators dedicating the focus of their career in evaluation and having evaluation related titles as well as "doing the work" of evaluation for long periods of time. As one survey respondent commented: "Years of experience resulting in expertise in the area of evaluation" Another survey respondent mentioned:

Significant experience with evaluations across multiple contexts over time, knowledge of evaluation tools and standards, flexibility/adaptability to know when, how to best use those tools and apply standards. Being an excellent communicator also helps clients, coworkers and supervisors who may not have evaluation experience understand what it's all about.

A key informant noted: "The people that come to mind are very experienced, they have done the practice for a long time. I think that they also kind of keep up with what is happening in the field, always developing. Always reading the latest evaluation book, going to conferences, reading journals, keeping up competencies." Another survey respondent noted: "Significant experience in the field of evaluation and embodies the CES competencies". Another survey respondent indicated: "Years of education and experience that bring rigour and adaptability to the work". Respondents were not just identifying the length of time that individuals spent on evaluation, but dedicated components of work linked to skills that made them professional.

Having Technical Skills

Respondents commented often about how a professional evaluator is proficient in the work they complete and have a wide variety and solid understanding of technical skills. Respondents commented on skills related to methodology and data collection as well as

theoretical understanding of how to apply frameworks in their work. As one survey respondent

noted: "Strong understanding of evaluation theories, approaches, and methods. Excellent

analytical competencies to bring together evidence and determine key findings, conclusions, and

recommendations. Ability to assess evidence throughout." A key informant noted:

Analytical skills to find the truth, even if [they]work with quantitative samples, and methods –

to be able to analyze and provide conclusions and recommendations based on facts. Not on

guesses. [They] should be able to present the results. Even if you use sophisticated methods –

you must be able to simply explain what are the results/conclusions and next steps.

A survey respondent commented: "Sound knowledge of theories and frameworks that support

evaluation. Standard ethical practices are applied to each project. Are able to clearly define

evaluation questions, methodologies, report findings and translate into action." Another survey

respondent supported technical skills as a base of professional evaluators by noting: "A solid

base in research methods, experience planning and conducting eval projects, solid analytical

skills, the ability to translate a lot of information into findings and being able to communicate

those findings." A key informant commented: "They would have a really big toolkit – some

people that have one skillset or ability (e.g., quant or qual) – you cannot deliver the full scope of

what is required in evaluation." Another key informant commented about specific technical skill,

noting:

I think the one other thing is cultural competency – big thing in Canada as it is in [country] –

we do a lot of work with programs that are targeted for First Peoples – and it is a whole other

skill set. You need to have these skills to talk to diverse communities and those programs

require depth. You can really make a mess of it if you are not thinking of power and balance

and what people think is evidence and whose values you are presenting. It is about the values

underneath the evaluation and reflective practice around that.

In these ways, respondents were indicating that professional evaluators had to have a variety of

technical skills to execute their craft in order to be a professional evaluator.

Having Soft Skills

Respondents commented about professional evaluators having exceptional "soft skills"

including communication skills, being able to distill information into digestible and approachable

forms and being able to facilitate projects and people. One survey respondent commented:

"Strong interpersonal skills. An ability to look at the problem systemically. Strong facilitation

abilities. Ability to ask great questions.". Another indicated: "They have good engagement skills,

assess context, facilitates discussion to identify questions and promote use, can explain concepts

of evaluation in plain language, many more." Another survey respondent indicated:

Characteristics that make them a professional evaluator is how they demonstrate a

stakeholder-focused orientation (versus a primary research-focused orientation) through traits

of situational, technical, interpersonal, management, and reflective practice. They are also

able to navigate and communicate the relationship of their role relative to others (e.g.,

auditors). Ultimately, their professional practice is more than just use and knowledge of

technical skills (research methods and tools).

A key informant noted other soft skills by highlighting: "there are two underpinning things, there

is curiosity – really interested in the field and the context and the study of where they work. The

other one is an innate commitment to do the right thing with people and together with others. It is

a commitment to working towards betterment. But curious. And willing to learn." Similarly,

another key informant noted:

Many of what we are look at is not documented – what we want to know is not documented.

People throw hundreds of documents at you when you start an evaluation – they give you

good context on the outputs and context but especially for the stuff that I do with the federal

government. What we really want to know is about some of the challenges and some of the

impacts – intended and unintended. It is really rare this is documented. So we need to grab

information that comes from human beings and that requires building trust with them and

reading between the lines that allows you to understand the nuances that make your

evaluation interesting. So that is the one thing that stands out for me – those individuals who

have this ability to engage people, to listen, to be very adaptable when you through them in

front of different people and they feel adaptable.

Respondents, through the data collection were highlighting the soft skills that were also needed

to be a professional evaluator, a complement to the technical skills.

Contribution to the Evaluation Community

Respondents commented on professional evaluators contributing to their evaluation

community through communities of practice or mentoring others to share knowledge and

advance the greater knowledge of evaluation. They talked about contribution in terms of

generating knowledge or advancing research. As one survey respondent noted: "Their ability to

express and share their knowledge and experience and to teach or coach others" [makes them a

professional evaluator]. Another indicated: "Active participation in an evaluation society,

interested in theory and practice, shares ideas on evaluation with others, produces high quality

program or policy evaluations.". Another survey respondent noted: "Connected to and gain

guidance from communities they work for and community of evaluation practice." Another

indicated: "Promotes/enhances evaluation mindset in their community". With these exemplars,

respondents were communicating the importance of a professional evaluator having a relationship to and participation in an evaluation community – whether that be through a formalized society or through an informal mentorship group to contribute knowledge and continue to learn.

Respondents talked about contributing to the evaluation community through professional society, networks of practices or through research. Others commented on identifying as an evaluator or advocating for the profession and educating clients or stakeholders on what evaluation means. One survey respondent noted: "achieving the evaluation competencies; reflective practice on their ability to achieve competencies; continued education in the field; educating others on these competencies and technical evaluation skills.". Another commented they try to be professional by "lead[ing] research projects and initiatives". Another noted: "being engaged with the evaluation community, being ethical, teaching evaluation (helps me maintain and build my competencies)". Another survey respondent indicated: "membership and volunteer involvement in evaluation professional associations; participation in evaluation conferences/webinars/continuing education opportunities; identification publicly as an evaluator.". By identifying their contribution to the evaluation community or advocacy for evaluation, respondents described the approach as important for them in being a professional evaluator.

Respondents were asked about how they try to be professional in their work as an evaluator through the survey and key informant interviews to further understand traits of what it means to be a professional evaluator. They provided responses that interestingly enough did not always overlap with the themes they identified when they thought about a professional evaluator

and instead indicated the following additional themes of what it means to be professional – when describing how they try to be professional in their work.

Application of Sound Evaluation Practices

Respondents commented about how they focus on remaining unbiased and approach projects with objectivity as well as reflecting on their practice as they complete projects. They commented on applying sound evaluation practices to their work as being professional. As one survey respondent indicated:

I make an effort to be methodologically sound in my approaches and am cognizant of my own biases and perspectives that might influence how I do my job. I try to be neutral and let the data speak for itself but when collecting the data I need to balance against any unconscious bias to ensure I am not guiding respondents to answers.

Another commented they try to be professional by "designing assessments which respond to client needs, ongoing communication, anchoring analysis and findings in theory, literature and evidence, ethics and confidentiality protocols". Another survey respondent indicated they: "apply my extensive knowledge, communication and organizational skills, ability to question, listen, facilitate and engage others while following CES standards and ethics.". Another noted they "try to follow evaluation best practices, bring a critical eye to my work and others to ensure quality, keep data confidential and try to remain unbiased during the whole process of an evaluation.". A key informant commented they try to be professional through: "reflective practice – I aspire to, I don't dedicate enough time to it, but it's something that is extremely beneficial.".

Following Standards

Respondents commented that they tried to be professional in their work by following evaluation standards and ensuring they align to the professional standards of practice that exist.

One survey respondent noted: "I adhere to and apply the Joint Committee Standards for

Evaluation in all my work.". Another survey respondent commented:

Strong methods, staying up to date in relevant trends and conversations in evaluation,

focusing in on particular skills to become more of an expert in while maintaining general

competencies, capacity building for colleagues/department, referring to CES and its definition

of evaluation, other information, and resources available from CES, strong commitment to

ethics, open-minded, attention and sensitivity to diversity and inclusion.

Another survey respondent indicated: "I base my work on the standards set in Canada for

evaluators as well as guidelines set by the [Treasury Board of Canada].". Other survey

respondents and key informants highlighted the importance of adhering to a set of standards,

whether those were ethical, competencies, methodological standards, or practice standards.

Professional Development and Continuing Education

Respondents also noted they tried to be professional by pursuing professional

development opportunities or continuing education. Respondents tried to keep well read and up

to date on evaluation practices and content topics to enhance their practice. A survey respondent

commented: "I try to stay up to date on the latest trends in the field (e.g., through conferences,

workshops, collaborations with evaluation colleagues, and participation on CES committees) and

I apply these to my work." Another noted they try to be professional by doing "continuing

education, reflecting learning, engagement in communities of practice." Another indicated: "I try

to learn as much as possible about the theory and practice of evaluation from different sources,

mostly on my own (reading and developing personal projects of my own related to evaluation -

tools, concept models, analysis synthesis)." A key informant noted:

So professional development is one of the main things that I do – I go to conferences, I do a

lot of reading, it's a bit part of the teaching – I have to keep up in the literature to be able to

teach it and serve my clients well, I work with diverse people – I need a big toolkit to figure

out what is going to work in this scenario – there is a lot of professional development that I

do.

Summary

Throughout the research, the theme of the concept of a professional evaluator and what it

means to be a professional were discussed. Although the meaning of "professional" varied

amongst Canadian and International evaluators based on their perceptions and experiences, they

indicated it was very dependent on experience they had, and in knowledge, skill, awareness, and

competencies. Subthemes emerged where respondents indicated that evaluation professionals

had extensive knowledge of evaluation, dedicated work in the field of evaluation over many

years, technical skills, soft skills, and contributed to the evaluation community. In addition,

respondents to the surveys and key informant interviews noted they tried to be professional by

applying sound evaluation practices, following standards, participating in professional

development and continuing education, and contributing to the evaluation community, including

through advocacy. In their discussions, respondents were able to identify traits, attributes, or

actions that in their perceptions, indicated someone was a professional evaluator.

Theme Four: Professionalization of Evaluation

The next dimension of progressive focusing brought participants through from examining

the status of the evaluation profession, traits of what it means to be a professional evaluator and

then to the professionalization of evaluation through competencies and credentials. This section

of the findings identifies key themes around the professionalization of evaluation as perceived by participants.

Professional Identity

Respondents to the survey and key informant interviews were asked about their identity and whether they believe they belong to a recognized profession and consider themselves professional evaluators. Survey respondents were asked quantitative and qualitative questions while key informants were asked open ended questions about the professionalization of evaluation and often discussed their professional identities as they reflected on the questions.

Figure 16

Professional Identity of Evaluators
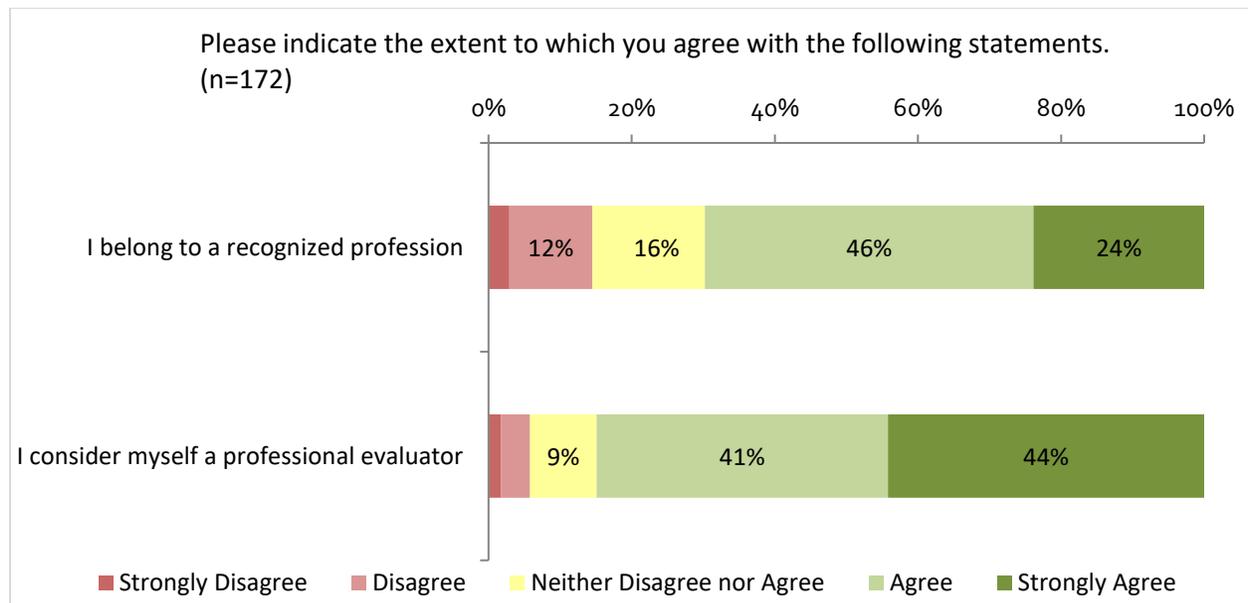
Note: any categories with less than 5% of responses the label has been removed for readability.

The majority of survey respondents strongly agreed or agreed they belong to a recognized profession (70%) and consider themselves to be a professional evaluator (85%). When disaggregated by CES membership, respondents at similar rates agreed they belonged to a recognized profession. Those that had a CE designation, however, more often agreed they

belonged to a recognized profession than those without a CE. Key informants in all interviews

discussed how they arrived at the area of evaluation as professional practice and about their

identities as evaluators. They discussed how their careers had evolved and their experiences

within evaluation. In many cases, identifying incredible personal career trajectories that formed

their identities as professional evaluators. For the sake of anonymity, quotes will not be shared,

however all key informants discussed their identities and experience as an evaluator and agreed

they belonged to a professional area of practice – some agreeing it was more well defined than

others, and that their work and identity was that of a professional, and the domain of evaluative

practice. Through their discussions, they reflected many of the traits they identified previously in

professional evaluators – individuals who had knowledge of evaluation, had practiced in the field

for a long time, were skilled technically, had soft skills, and who contributed to the evaluation

community.

Respondents who completed the survey were asked a series of demographic questions,

which helped to describe their background and identity as an evaluator. Respondents were

primarily employed by an entity (e.g., consulting firm, government, non-profit, academia) (76%),

in occupations in education, law and social, community and government services (40%), and

worked primarily in the federal public sector (23%), provincial public sector (20%) or were self-

employed consultants (17%). They described their roles primarily as a producer of evaluation

results of their own organization (e.g., internal evaluator) (62%) or as a producer of evaluation

results for organizations other than their own (e.g., external evaluator) (45%). Respondents most

frequently reported working full-time in their role (76%). Respondents to both the survey and

key informant interviews were asked about how long they have worked in the field of evaluation

and noted an average of 14.07 years (median 12.5, mode 15). Respondents were representative

of the Canadian population and CES membership distribution and were highly educated

(majority indicating they had obtained a Master's degree (62%) or Doctoral degree (23%)). Most

were members of CES (83%), reflective of the survey distribution, and most had been members

of CES for a long time (10+ years (40%), followed by 5-9 years (25%)). In the 2016 survey on

professionalization, many of the same demographic questions were asked and responses

remained consistent between the two administrations with very little deviation, supporting the

nature of the sample as characteristic of CES membership (Fierro et al., 2016).

Professionalization Approaches

Key informants and survey respondents were asked to talk about various dimensions of

professionalization approaches, namely the importance of experience, competency frameworks,

ethical frameworks, and qualification (credential) approaches. Survey respondents, when asked

the extent to which they agreed with statement about the need for relevant experience,

competency or capability frameworks, ethical frameworks, or evaluation qualifications in their

evaluation practice noted the following.

Figure 17

Need for Features in Their Evaluation Practice
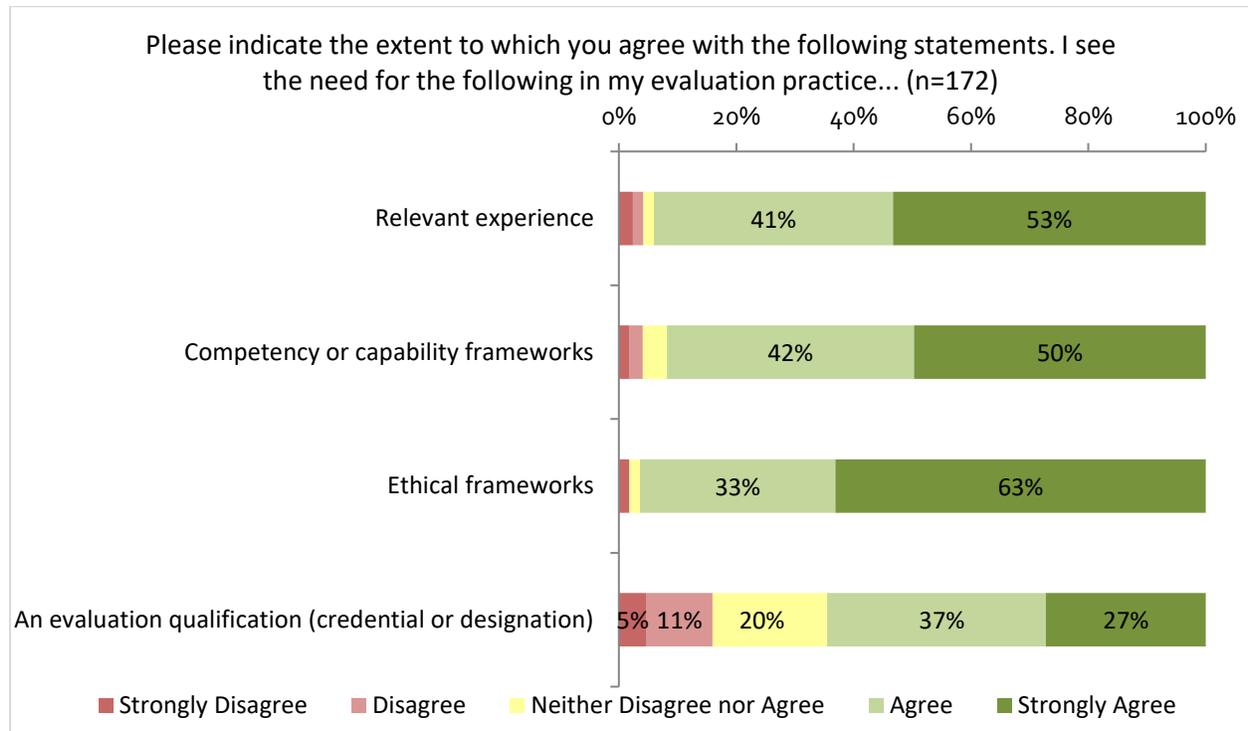
Please indicate the extent to which you agree with the following statements. I see the need for the following in my evaluation practice... (n=172)

Category	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree
Relevant experience				41%	53%
Competency or capability frameworks				42%	50%
Ethical frameworks				33%	63%
An evaluation qualification (credential or designation)	5%	11%	20%	37%	27%

*Note: any categories with less than 5% of responses the label has been removed for readability.

Most respondents agreed (strongly agree or agree) they saw the need for relevant experience (94%), competency or capability frameworks (92%) and ethical frameworks (96%). The majority, but fewer respondents agreed they saw the need for an evaluation qualification in their evaluation practice (65%). When disaggregated by CES membership, responses were similar except for the dimensions of evaluation qualifications, where fewer non-CES member respondents agreed an evaluation qualification was needed. Equally, those with an evaluation credential demonstrated similar patterns of responding as reflected in the aggregate results, but with increasing strength towards "strongly agree" on all dimensions.

Key informants were asked the extent to which colleagues in their associations see the need for evaluation competency or capability frameworks or qualification approaches for

evaluation professionalization. Generally speaking, the international key informants were

supportive of capability or competency frameworks but less so of qualification approaches.

Canadians were very supportive of both. As one international key informant described: "[in our

current] approach to professionalization – it is a very good initiative, and it fits with my sense of

engaging people with what they have done, and they can consider where to develop and further

strengthen their work with the light of an important peer – that in principle is very much worth

renewing.". A Canadian key informant noted:

> I think they are essential but also those around me – but maybe filtering people I hang around
>
> with. One would have to go back to how the world was in 2005 or 20 years ago 2002 and
>
> there were no competencies and no association had them, the debate on professionalization
>
> had ended up in a dead end in the 90s so what now. And what we had was a disjointed
>
> practice of people who called themselves evaluators but not talking about the same things.

One international key informant commented: "I think we would get a lot of benefit – it would

give you credibility and status – like accounting and auditing – the same toolkit nationwide. If

you could say – anyone practicing evaluation has this skill set would be massively helpful".

Another international key informant agreed and noted: "I understand the perspective of others,

but I really believe in professionalization is important. Some way that those that are going to hire

evaluators they can get to understand the competencies. Starting with understanding what those

competencies should be".

Summary

Throughout the course of data collection, respondents actively participated in in-depth

discussions revolving around the critical subject of professionalization within the realm of

evaluation. This dialogue encompassed not only the process of professionalization itself but also

the broader concept of establishing a distinct and robust professional identity for individuals

engaged in evaluation practices. The insights gathered from both survey participants and key

informant interviewees painted a compelling picture of the prevailing sentiments within the field.

A prominent theme that emerged from these discussions was the resounding support for

professionalization. This support was characterized by a fervent belief in the necessity of

cultivating a professional identity for evaluators that is anchored in experience, skill

development, and a clear focus on competencies. Respondents articulated a strong preference for

frameworks that emphasize these attributes as the bedrock of their professional journey.

However, it's essential to highlight an intriguing nuance in the data. While the majority of

respondents championed the experience-based and skill-oriented avenues to professionalization,

there was also a contingent of individuals who expressed an openness to qualification-based

approaches. It's worth noting that this inclination towards qualification-based approaches

appeared to be more pronounced among respondents based in Canada, where such mechanisms

may hold greater significance within the local context.

In summary, the overarching sentiment among respondents was one of unwavering

commitment to their identity as professional evaluators. This collective identity was firmly

rooted in the belief that the field of evaluation should be duly recognized as a legitimate and

respected profession. The unanimous voice of our participants underscored the paramount

importance of professionalization as a driving force in uniting and consolidating the identity of

evaluation practitioners, ultimately fostering a cohesive and widely acknowledged professional

community within the discipline. This recognition serves as a testament to the significance of

professionalization in shaping the future of evaluation practice.

Theme Five: Value of Credential

Another theme of findings that emerged from the data was that around the value of the

credential or Canadian qualification approach. Canadian evaluators, though positive about the

Canadian credential, did wonder about the tangible value of the qualification. Canadian

evaluators through the survey and interviews were positive about the approach to

professionalization and saw value in having a qualification approach for the evaluation

community. However, when asked about the tangible value, they were less likely to identify

strong concrete "cause and effect" kinds of value (e.g., because of the qualification I got a better

job). In some cases, evaluators who bid on federal contracts were able to demonstrate such value

as the federal government does award extra points for credentialled evaluators. By and large,

however, evaluators commented on the value for the field of evaluation, and they hoped to see

cascading effects within their own practice and their commentary touched on the exchange value

of the credential – that is, the value lies in its exchange (obtaining better work, recognition, etc.)

or in its use (e.g., developing skills, reflecting on practice).

Respondents to the survey and key informant interviews were asked if they were aware of

the CE designation, created by the CES to assess competency, education, and practice as a

qualification approach. Based on their response, they were then asked a series of questions about

qualification approaches. The majority of respondents to the survey noted they were aware of the

CE designation (92%). As expected, when disaggregated by CES membership, more CES

members were aware of the designation (96% compared to 61% of non-CES members). Key

informants were aware of the designation, some at a surface level – as one informant noted:

"Each to their own and very good, sure it is a rigorous and robust system and a valuable

experience for people to go through it – probably improved their status and opportunities and

these as empirical questions, because I come across credentialed evaluators, but I have not come across the specifics of the scheme.".

The survey had a series of questions to understand the experience of evaluators who have experienced a qualification approach through the CES in the form of the CE designation. For those that indicated they had the CE designation (n=121), they were asked how long they have held the CE designation. Most had held the designation for many years (32% over 10 years, 36% between 5-9 years). They were asked why they pursued the CE designation and primarily noted it was to demonstrate their credibility as an evaluator (73%) or to demonstrate their competency as an evaluator (72%). Fewer noted it was to increase the jobs or contracts they could receive (48%), for status (16%) or experience (12%).

In the survey, respondents were asked statements about the CE designation and provided their level of agreement. The majority of respondents agreed that the CE designation is important for CES to have (71%), contributes to more professional evaluators (63%), makes an evaluator more credible (70%), positively impacts the evaluation community (69%). Fewer respondents agreed that the CE designation makes an evaluator more employable (54%) or positively impacts the evaluation community internationally (49%). When disaggregated by CES membership, CES members were more likely to respond positively about the credential – noting it is important for CES to have, contributed to more professional evaluators, makes an evaluator more credible, employable, and positively impacts the evaluation community in Canada.

Figure 18

CE Designation Impacts

Please indicate the extent to which you agree with the following statements. The CE designation... (n=264)

Statement	Strongly Disagree	Disagree	Neither Disagree nor Agree	Agree	Strongly Agree	Don't know
is important for CES to have.		7%	16%	30%	41%	
contributes to more professional evaluators.		11%	17%	34%	29%	5%
makes an evaluator more credible.		7%	16%	38%	32%	
makes an evaluator more employable.		11%	22%	32%	22%	10%
positively impacts the evaluation community in Canada.		7%	16%	38%	31%	5%
positively impacts the evaluation community internationally.	5%	10%	20%	30%	19%	16%

Figure 19

CE Designation Impacts - Personal
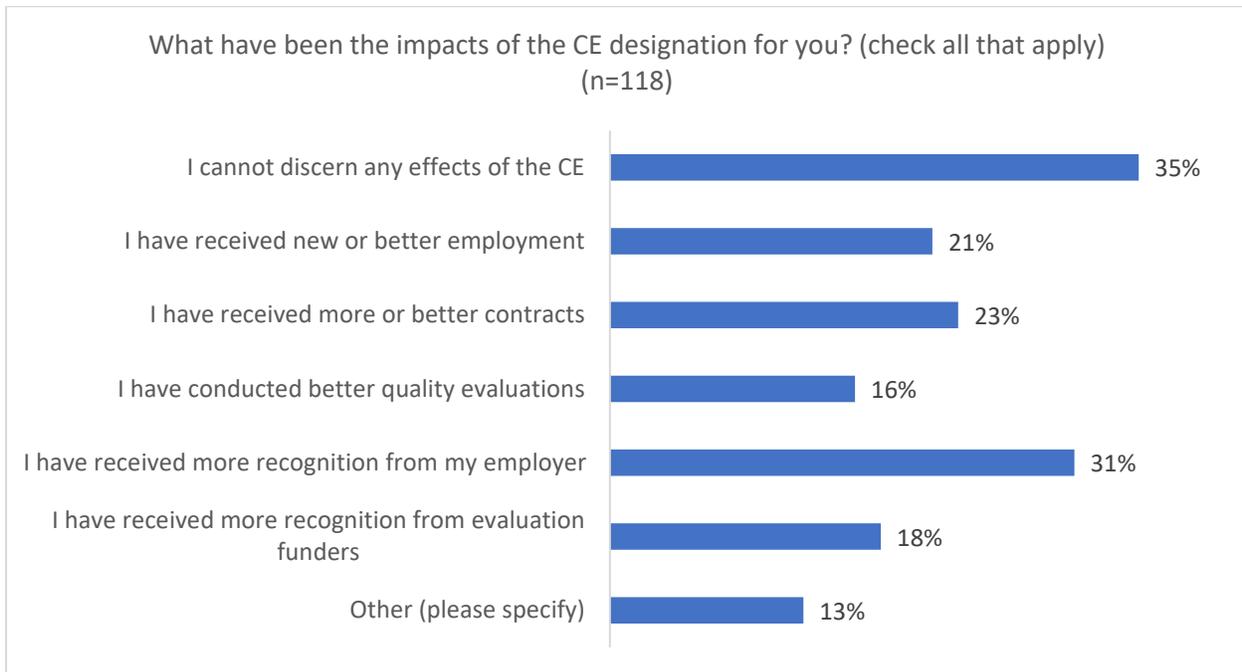
Respondents were also asked about the impact of the CE designation for them. Some

respondents noted they could not discern any effects of the CE (35%), they have received more

recognition from their employer (31%) or have received more or better contracts (21%). Fewer

indicated they have received more recognition from evaluation funders (18%), or they have

conducted better quality evaluations (16%). Those respondents who had the CE designation were

asked in the survey (n=94) and in the key informant interviews "What has been the value in

obtaining the CE designation for you personally?". Key informants were also asked about the

extent to which a qualification approach contributes to more professional evaluators, makes an

evaluator more credible, affects the employability of the evaluator, and impacts the evaluation

community. The following subthemes related to the value of the qualification approach and

credential were highlighted.

Recognition of Competence

Respondents noted the CE had value for them in recognizing the competencies they hold and in publicly validating those competencies for others. They discussed being able to point to it as a qualification and symbol of competency. As one survey respondent noted: "Since the evaluation profession is very broad, the CE designation has been validating for me personally that I have demonstrated the necessary competencies to be an evaluator." Another survey respondent commented: "I feel that I have the credibility of my peers. It has meant a lot to me. I wear my pin at relevant professional events." A survey respondent indicated: "Having the designation sets me apart from others in my organization who might be "doing evaluation" but whom I would not consider to be "evaluators' in a more professional sense.". A survey respondent commented: "It's a way for me to show others that I have the experience, depth, skills, knowledge to do this work professionally. It helps bring credibility to my unit's work.". A key informant commented: "I know what is involved in getting the credential and it is not insignificant, so I do think it lends credibility". Another commented about the recognition by noting: "An important advantage for me as an evaluator is that people recognize it, and a number of RFPs will say credentialled evaluator preferred". Another noted "that's what more and more people expect in every field is to be more credentialed or to be recognized". Thus, describing the credential and a qualification as being outwardly a demonstration of competence and connected to increased credibility.

Opportunity to Reflect on Practice

Respondents commented that the CE process had value for them in requiring them to reflect on their practice and continue to learn about evaluation theory or methods. As one survey respondent noted:

The process of applying helped me to identify areas where I have strong practice and areas

that I needed to strengthen. It helped me to become a better evaluator. It also helped me to

feel more confident in job applications and more credible when working in evaluation.

Another indicated: "I learned a great deal about evaluation during the process of writing my

narrative responses to obtain my CE". Another survey respondent commented:

Although the process was somewhat tedious, it did give me the opportunity to reflect on my

experience to date and to recognize areas where I could work to gain more experience. It also

gives me greater credibility within the community and shows that I support this important

initiative.

A key informant commented "the other benefits like self-reflection are more important. To me

since the time we measured it in 2015 – the professional identify has been at the top of my list –

people saying I am an evaluator". By providing these responses, survey respondents and key

informants identified the process in and of itself provided opportunity for reflection on their own

practice which was valuable.

Advances Professionalization of the Evaluation Field

Respondents commented the CE has helped to advance the professionalization of the

evaluation field and/or the visibility of evaluation in Canada. One survey respondent noted:

Recognition that I am a professional evaluator - in training/PD and experience. There are so

many evaluators that are professionals in other areas doing evaluations - which is fine,

especially for evaluations in their professional spheres. But the CE to me emphasizes that my

focus is on the specific process and tools/competencies as outlined by the CE. I can point to it

and say "this is what I do.

Another indicated that: "Belonging to a professional community, having a professional identity".

A key informant noted there was value to the profession, by commenting: "to the profession-which has improved processes to clarify the competencies, has created a constellation of activities around the competencies and the CE itself, supporting the CEs in learning, creating offerings to plug the holes we identify when we review application, and defining the profession.". Another key informant noted:

> I think over time, and not necessarily at the personal level, but more and more meetings that I attend both project and work meetings as well as in my volunteer world – people are now saying – I am a credentialled evaluator – you are seeing the CE in the signatures, it is popping up more and more. As a collective and moving forward we are going to create a curiosity – people are going to say what do you mean and credentialled to do what and that comes slowly, and it is growing.

An international key informant observed: "I think it is a great kind of middle ground – it is way better than self–assessment – I think the question is – how much the end user values and recognizes it". Both key informants and survey respondents talked about the value of the credential in its contribution to the profession and professionalization as a whole – more so than at an individual level.

Encourages Professional Development and Continuing Education

Respondents commented that the CE has encouraged them to maintain their continuing education or professional development as it is now a specified requirement. One survey respondent noted the CE: "forces me to do professional development to maintain CE, but I suspect I would be doing that anyway". Another survey respondent indicated: "the fulfillment of having achieved a professional milestone that represents the cumulative education/trainings and

evaluation projects I have undertaken to-date to build my skill set as an evaluator. My hope is

that in the future, it will also open up more professional evaluation opportunities". An

international key informant noted the importance to credibility of the profession by indicating:

"the credential does require that you do so many hours of PD, and I think that is important

because if you don't keep up in your field you fall behind. That is an important advantage to the

evaluation community". Another key informant talked about the contribution not just to

individual professional development but to how professional development is offered to CES

members at large or how the CE creates opportunities for assessing gaps in competencies:

> For the ecosystem – through a structure for training which we did not have before – before the
>
> competencies training was haphazard, someone wants to talk about this – let's have a seminar
>
> on that pre webinar. The recognition of competence – it is limited but it exists and
>
> defensibility of the profession.

Provides Increased Opportunities for Employment

Respondents noted the CE has in some cases had added value for their personal career

goals or attainment of contracts or employment. As one survey respondent indicated:

> At the beginning, being within the first cohort having CE, it helped me as a consultant to get
>
> contracts. I joined the federal government two years ago and CE was an asset for a manager
>
> position. Now moving forward, it keeps me in the loop. With the profession and the
>
> community.

Another survey respondent indicated:

> The CE has definitely helped me land consulting work and has opened doors to multiple
>
> government jobs I've held over the past 10+ years of having the CE. That being said, I'm also
>
> highly confident that NOT having the designation would not have been a major impediment

to my career progression... at this stage, the CE is still making progress from a "nice to have" towards a "need to have".

A survey respondent noted: "It helped my employer qualify for government contracts. By doing so, it provided me with leverage to improve my position and salary." As one key informant noted: "of course [it has helped my career] – do you ever buy a product just because it says number one brand because we are hardwired to think that any sort of star means something. Whether we understand what that star means or not it is human nature". Another key informant indicated: "I think it does a little bit – my understanding is that the federal government often has it in their requirement to apply for it, I see it occasionally in job posting and RFP – where they say a CE is preferred. I think to some extent it does". Another international key informant noted the impact of the qualification approach on employability in the Canadian system by noting:

It does if they have done it like in Canada – your TORs ask for credentialed evaluators, so it has become a requirement – I don't see that happening elsewhere, for example it is about whether the commissioners buy into this – outside of Canada I am not seeing it. Commissioners are not attending professionalization debates.

In these ways respondents were discussing the value of the credential in advancing their careers, regardless of whether the CE was awarded properly or as a true recognition of competence. As one key informant noted:

Unfortunately, there can still be CEs that are not particularly outstanding. There was someone who applied to be a CE and I recused myself and I knew him and thought him one of the most incompetent people I had met so I couldn't go into the fair process, and he did not get his credential.

As outlined, respondents to the survey also reported they had received more contracts (23%) or new or better employment (21%) as a function of the CE designation.

Uncertainty of Tangible Value

Although respondents identified many themes of the impacts and value of a qualification approach, respondents were asked in the survey and in key informant interviews "what has changed for you since obtaining the CE designation". Many indicated they could not identify anything tangibly but more in theory. As one key informant noted:

I didn't get a raise; I don't know that much necessarily changed. It is hard for me to follow up on has it landed contracts that I wouldn't have been able to get – have I presented at CES more than I would of without it. I don't know. I know that I want it and I want to keep it and I think it offers some distinction but it not something I can quantify – do you do better in winning contracts or anything.

Others through the survey indicated they had not noticed any discernable effects (35%) and fewer had indicated they have received more recognition from their employer (31%) or have received more or better contracts (21%). Fewer indicated they have received more recognition from evaluation funders (18%), or they have conducted better quality evaluations (16%).

Summary

Respondents commented about the credential being important to increase the credibility of the evaluation profession and/or their own individual practice. They described it as important for the profession as a whole, to advance towards professionalization and move towards regulation of the field so "not just anyone" could call themselves an evaluator. Respondents commented that the CE helps to contribute to more quality evaluations and demonstrates the ability and competency of the evaluator applying. They also noted they were recommended it for

the competitive edge it provides to advancing ones career or awarding extra points in an RFP

process, particularly in the Canadian environment. Overall, respondents raised themes about the

value of the credential being a recognition of competence, providing the opportunity to reflect on

practice, advancing the professionalization of the evaluation field, encouraging professional

development, and continuing education, and providing increased opportunity for employment.

Even with the themes about the value of the CE that emerged through the data analysis, it was

clear that respondents were still grappling with the tangible value of the qualification and

whether that value was ascribed in a socially constructed manner versus a tangible manner. Their

discussion pointed out interesting intersections of exchange value – where the credential was

observed to have value in its exchange (e.g., offering some better contracted opportunities, some

increases in pay) and in its use (as a reflection tool, to enhance skill).

Chapter Summary

The findings chapter encompasses five overarching themes that emerged during data

analysis, each shedding light on critical aspects of the evaluation professionalization landscape.

These included themes about the influence of the Canadian experience, the status of evaluation

as a profession, the concept of "professional evaluator", the professionalization of evaluation and

the value of the credential.

Theme 1 - Influence of Canadian Experience: An essential theme surfaced concerning the

profound influence of the Canadian experience on perceptions of evaluation professionalization.

This influence manifested through two distinct subthemes: the intrinsic impact of being a

Canadian evaluator and the amplification of support for professionalization, particularly

qualifications, among CES members and credential holders. In contrast, international

perspectives revealed greater variability in definitions of professionalization, evaluator roles, and less enthusiasm for qualification approaches.

Theme 2 - Status of Evaluation as a Profession: Findings from surveys, key informant interviews, and a desk review of evaluation associations collectively underscored the dual nature of evaluation's professional status. Respondents acknowledged the presence of professional elements, including training, unique knowledge, standards, ethics, and supportive networks. However, they also highlighted gaps in standardized education, competencies, and oversight, emphasizing that evaluation lacks a universally understood set of competencies, akin to other established professions.

Theme 3 - Concept of 'Professional Evaluator': The research uncovered ongoing discussions surrounding the concept of a 'professional evaluator.' The meaning of "professional" varied among Canadian and international evaluators, centering on experience, knowledge, skills, competencies, and contributions to the evaluation community. Traits such as extensive evaluation knowledge, years of dedicated practice, technical and soft skills, adherence to standards, continuous professional development, and advocacy activities emerged as indicators of professionalism.

Theme 4 - Professionalization of Evaluation: A pivotal theme emerged in the dialogue on professionalization within evaluation. Survey participants and key informants demonstrated strong support for professionalization, with a focus on experience-based, skill-oriented pathways. Nevertheless, a noteworthy nuance was the openness to qualification-based approaches, especially among Canadian respondents. The prevailing sentiment emphasized the importance of recognizing evaluation as a legitimate and respected profession, uniting practitioners, and fostering a cohesive professional community.

Theme 5 - Value of Credential: Respondents emphasized the significance of the credential, attributing it to increased credibility for both individual evaluators and the profession as a whole. They noted its importance in advancing professionalization and regulation, enhancing evaluation quality, showcasing competence, gaining a competitive edge, and opening doors to employment opportunities. Discussions revealed a multifaceted view of the credential's value, encompassing both socially constructed aspects and tangible benefits such as improved contracting opportunities and pay increases.

In summary, the findings depict a dynamic landscape where the Canadian experience, the understanding of the professional status of evaluation, the concept of a 'professional evaluator,' the enactment of the idea of the professionalization of evaluation, and the value of the credential intersect to shape the trajectory of the evaluation profession. Respondents' perspectives collectively underscore the importance of professionalization in establishing evaluation as a recognized and respected field, while recognizing the ongoing exploration of its tangible and socially constructed value. These insights contribute to a richer understanding of the professionalization journey within the evaluation discipline. The next section discusses these findings and answers the research questions.

Chapter 5: Discussion

Chapter five presents a critical analysis of the empirical findings presented in Chapter 4, employing a thematic approach to elucidate their meaning and implications. Building upon the groundwork laid in the preceding chapter, which included an examination and interpretation of the collected data, the present discussion chapter ventures beyond surface-level observations. In this chapter, I employ a thematic lens to discern underlying patterns, interrelationships, and overarching themes embedded within the dataset. Through thematic understanding, I move from empirical description to a higher plane of interpretation, thereby unearthing insights that underpin the significance of the research findings. This chapter provides the opportunity to synthesize and make sense of the findings and engage in a thoughtful exploration of the results. Their meaning, implications and relevance within the broader scholarly context will be discussed through nuanced interpretation and reflection. The discussion will focus on synthesizing the findings into case assertions which include discussion that evaluation is a social construct which has implications for professionalization, there are barriers to qualification approaches and their functionality in evaluation, and the impact of evaluation professionalization is multidimensional. Contextual information will be provided for the discussion, followed by a discussion of each case assertion, generated from the research findings.

Discussion Context

What is termed the professionalization of evaluation has been a topic of significant interest and debate within the evaluation field. As an evaluator holding an evaluation credential in Canada and having been actively involved in the board of directors for the CES, my personal experience and exposure to different international evaluation community approaches have served as the motivation for conducting this study. Throughout my years as an evaluator, I have

witnessed the growing emphasis on professionalization efforts as central to the development of

evaluation as a practice, including the establishment of standards, competencies and

qualifications and the subsequent debate about the merit of these approaches. These initiatives

aim to recognize and enhance the expertise and competence of evaluators, as well as to solidify

the status and designation of evaluation as a profession. However, the implications and effects of

these efforts to enact professionalization remain complex and multifaceted, warranting further

exploration and analysis.

Foundational to this study are the existing literature and discourse surrounding the idea of

what it means to be a "professional" in the evaluation field from those involved as practitioners,

thinkers, users and commissioners and the ongoing objective of designating evaluation as a

profession and the status this is considered to award. The literature has provided valuable

insights into the competencies, ethical considerations, and knowledge required for evaluators to

be regarded as professionals. However, there are still gaps in practical research that explore the

lived experiences and perspectives of evaluators undergoing the professionalization process. This

study aimed to contribute to the existing body of knowledge by delving more deeply into the

implications of evaluation professionalization and what it means to be a professional evaluator. It

went beyond the Canadian literature, which extensively examined the professionalization efforts

within the Canadian context and explored the international landscape of evaluation

professionalization. By examining the Canadian case as a case study, this research sought to

advance understanding of the effects of attempts to professionalize evaluation through

credentialization, the experience of evaluators of this process, and the impact on the positioning,

practice, and employability of evaluators.

The research addressed gaps in practical research on the enactment of evaluation professionalization by providing insights into the experiences, perspectives, and outcomes associated with obtaining evaluation credentials. By exploring both the Canadian and international contexts, this study shed light on the broader implications of evaluation professionalization and its effects on the evaluation profession as a whole. In the current discussion chapter, the findings from the completed research study will be discussed in the context of their contribution to a comprehensive understanding of the evaluation field and its evolving dynamics and serve as a basis for further discussions and implications in the field of evaluation professionalization.

Adaptations of two broad theoretical frames (Classification and Framing (Bernstein, 1978) Use, Exchange, Knowledge, and Self-actualization (Oughton, 2010) were used to make sense of the findings. The chapter is structured according to the case assertions, which synthesize the research findings.

In the context of my current research, as discussed in my positionality as a researcher in Chapter 2, I have chosen to embrace a non-essentialist perspective regarding the nature of evaluation and the concept of a profession, along with related ideas. This approach differs from the essentialist viewpoint often advocated by supporters of evaluation professionalization, which asserts that evaluation is a clearly defined and predetermined profession. Instead, I lean toward a perspective that sees evaluation as a socially constructed phenomenon. By taking this non-essentialist stance, I recognize the dynamic interplay among context, societal influences, and the various viewpoints of practitioners within the evaluation field. This epistemological orientation emphasizes the nuanced understanding that the notion of a profession isn't a fixed and inherent

entity; rather, it emerges from ongoing negotiations, shared interpretations, and evolving

paradigms that shape the nature of evaluation within its broader socio-cultural context.

Evaluation and Professionalization as Social Constructs and Their Implications

The evaluation professionalization debate was found to be a complex and multifaceted

topic that encompasses various perspectives, opinions, and challenges. A central component to

this debate is the emerging understanding from this research that evaluation, as a field and

practice, is a social construct. Evaluation, as a social construct, implies that it is not an objective,

fixed entity but rather a product of social interactions, values, and norms within a given context

(i.e., it is not conceptually possible to adopt an "essentialist" definition of evaluation, it is

situated and evolving). It is shaped by the beliefs, ideologies, and power dynamics of individuals

and institutions involved in evaluation processes. As social constructs, evaluation and its

professionalization are subject to interpretation, negotiation, and contestation, which can

influence how they are perceived and practiced.

The recognition of evaluation as a social construct has significant implications for the

perception and enactment of what is termed the professionalization process. Theorists understand

professionalization as involving and establishing evaluation as a distinct and recognized area of

practice with its own standards, unique practices, and ethical guidelines. However, as a social

construct, evaluation lacks clear boundaries and a universally agreed-upon definition, making the

realization of this the professionalization process challenging. The diverse nature of evaluation

work, the varying contexts in which it is conducted, and the multitude of stakeholders involved

contribute to the complexity of defining and professionalizing evaluation. The data revealed that

participants consistently emphasized the diverse skill set required for evaluation practice.

Through their experiences, participants recognized that evaluation encompasses a wide range of

abilities, including data analysis, research design, stakeholder engagement, communication, and

critical thinking. They expressed that their own understanding of the social construct of

evaluation was shaped by these diverse skills and their individual experiences within the field.

Participants, through their discussions, highlighted how they responded to and actively created

their own understanding of evaluation as a social construct, influenced by their unique

perspectives, values, and professional backgrounds – key amongst these the difference of the

Canadian and international experiences.

        The socially constructed nature of evaluation also raises questions about who holds the

power to define and shape evaluation as a practice which can be designated a profession by use

of trait criteria. The professionalization process (defined in this way) can involve the

establishment of credentialing programs, certifications, and qualifications to assess and recognize

the competence of evaluators (as in the Canadian case). However, the criteria for these

credentials and qualifications are influenced by the dominant voices and perspectives within the

evaluation field. This raises concerns about inclusivity, diversity, and the potential exclusion of

alternative perspectives and approaches that may be equally valid. The study revealed an

interesting contrast between participants from different countries regarding concerns about

diversity and inclusivity in qualification approaches to evaluation. Participants from countries

other than Canada commented about the potential exclusion of diverse perspectives and

approaches in the credentialing process. They emphasized the need for any professionalization

approach to consider a broader range of cultural, social, and contextual factors to ensure

inclusivity and relevance in evaluation practice and largely advocated against qualification

approaches. In contrast, Canadian evaluators, based on their understanding and social construct

of evaluation and professionalization shaped by a credentialing system, did not raise the same

concerns. This difference may be attributed to the established frameworks and standards within the Canadian evaluation profession, which participants felt adequately considered diversity and inclusivity factors in the qualification process. Nonetheless, this contrast underscores the importance of ongoing dialogue and critical examination of qualification approaches to ensure they are inclusive, representative, and reflective of the diverse needs and perspectives within the evaluation field, both within Canada and internationally i.e., are not "northern centric".

Evaluators, drawing on their social constructions shaped by various factors such as their training, environment, and country of experience, offered diverse views and perspectives on professionalization. These different contexts significantly influenced how evaluators perceived and approached the professionalization of evaluation. For instance, evaluators who had undergone specific training programs or educational backgrounds prioritized certain methodologies or theoretical frameworks in their understanding of professionalization. Similarly, evaluators working in different environments, such as government agencies, non-profit organizations, or private consulting firms, had distinct perspectives on what it meant to professionalize evaluation based on their experiences within these settings. Evaluators from different countries brought forth their unique cultural and institutional contexts, which influenced their conceptions of professionalization. These variations in social constructions contributed to a rich tapestry of perspectives that informed the discourse and debates surrounding the professionalization of evaluation, fostering a deeper understanding of the diverse needs and potential pathways for the evaluation profession.

In the Canadian context, experiencing a credentialing system can significantly shape evaluators' social construct of evaluation and their relationship to the profession. The presence of a credentialing system primes evaluators to think about professionalization in a specific way, as

it establishes certain standards, requirements, and expectations for practitioners. The process of obtaining credentials influences how evaluators perceive their professional identity and their role within the evaluation field. Experiencing the credentialing system in Canada influences evaluators' understanding of what it means to be a professional evaluator. It introduces evaluators to a set of standards, guidelines, and professional ethics that guide their practice. The process of obtaining credentials can enhance evaluators' sense of professional identity and legitimacy within the evaluation field. It provides them with a framework for thinking about their roles and responsibilities, and it fosters a sense of professional community and belonging. In Canada, the credentialing system for evaluators plays a crucial role in defining and shaping the professionalization of evaluation. The CES has established competency frameworks and a certification program that outlines the knowledge, skills, and ethical standards expected of evaluators. The credentialing program provides a pathway for evaluators to demonstrate their expertise and professionalism, and they contribute to the establishment of evaluation as a recognized profession in Canada.

However, it is important to recognize that the credentialing system and its influence on evaluators' social construct of evaluation are not without limitations. The criteria for credentials and qualifications are developed based on the prevailing perspectives and dominant voices within the evaluation field. While these standards aim to ensure competence and quality in evaluation practice, they may inadvertently reinforce certain biases, perspectives, or methodologies as the "correct" or "legitimate" ways of conducting evaluation. Furthermore, the credentialing system may inadvertently create barriers to entry for individuals who do not fit the established criteria or who come from diverse backgrounds and perspectives. This could raise questions about the inclusivity and diversity within the evaluation profession in Canada. It is

essential to critically examine the criteria and processes involved in credentialing to ensure they do not exclude alternative perspectives, approaches, or voices that may contribute valuable insights to the field of evaluation.

The understanding of evaluation as a social construct and the prevalence of commentary from evaluators that referenced the social constructed nature of evaluation as a profession adds complexity to the professionalization debate. It emphasizes the influence of social interactions, values, and power dynamics on the perception, practice, and professionalization of evaluation. Recognizing evaluation as a social construct calls for an inclusive and dynamic approach to professionalization that considers diverse perspectives, promotes reflexivity, and adapts to changing societal needs. The experience of a credentialing system in Canada shapes evaluators' social construct of evaluation and their understanding of professionalization. The presence of credentialing programs influences evaluators' professional identity, their perception of roles and responsibilities, and their sense of belonging within the evaluation field which is an important consideration to understand the impact of professionalization or credentialing efforts within Canada and throughout the world.

Barriers to Qualification Approaches and their Functionality in Evaluation

The current research has contributed to a new understanding of what a qualification is and the various functions it serves. Evaluation as a field draws on a wide range of skill sets and knowledge, often crossing disciplinary boundaries. It is characterized by its permeability, allowing practitioners to incorporate diverse perspectives and approaches into their work. This unique nature of evaluation poses challenges when considering the role of a credential or qualification in professionalization efforts.

Traditionally, qualifications have been associated with a specific set of skills or

knowledge that are deemed essential for a particular profession. They serve as a standardized

measure of competency, ensuring that individuals possess the necessary expertise to practice in a

given field (Jacob & Boisvert, 2010). However, the multifaceted nature of evaluation

complicates the notion of a rigid qualification. Evaluation encompasses a broad array of

methodologies, theoretical frameworks, and contextual considerations, making it difficult to

define a single set of skills or knowledge that universally applies. Moreover, evaluation often

requires interdisciplinary collaboration and the integration of diverse perspectives. Evaluators

frequently work in partnership with stakeholders from various disciplines, including sociology,

psychology, economics, public policy, and more. The permeable nature of evaluation allows for

the incorporation of different skill sets and knowledge domains, emphasizing the importance of

flexibility and adaptability rather than adherence to a predefined qualification.

In this context, the concept of a credential or qualification may feel counterintuitive to some

evaluators. They argue that the dynamic and evolving nature of evaluation practice necessitates

ongoing learning, continuous professional development, and the ability to draw from a wide

range of skills and knowledge sources. The emphasis shifts from a static qualification to a

continuous process of learning, reflection, and adaptation.

The research has highlighted the need to rethink the traditional notion of a qualification in the

context of evaluation. Rather than focusing solely on a credential as a marker of professional

status, there is a growing recognition of the importance of ongoing professional development,

reflective practice, and the ability to navigate complex and diverse evaluation contexts. This

evolving understanding of professionalization in evaluation opens up new avenues for discussion

and exploration of how best to support and advance the field while embracing its inherent permeability and interdisciplinary nature.

In addition to the complex and permeable nature of evaluation, it is important to acknowledge that evaluation as a field is not regulated in the same way as certain professions such as medicine or law. The absence of regulatory bodies and standardized practices adds another layer of complexity to the discussion on evaluation professionalization. Evaluation practice varies across different contexts, organizations, and regions, reflecting the diversity of evaluation needs and approaches. This variability makes it challenging to establish rigid boundaries and qualifications for evaluators. Without regulatory oversight, there is no centralized authority that can define the specific requirements or competencies needed to practice as an evaluator. In the absence of regulation, the notion of a credential becomes even more challenging. A credential typically implies a standardized set of criteria that must be met to obtain professional recognition. However, in the case of evaluation, where there is no universal agreement on the core competencies or qualifications, establishing a credential that is widely recognized and accepted becomes a complex task.

The variability in evaluation practice further contributes to the difficulty in defining a credential. Different evaluators may employ different methodologies, approaches, and theories based on their unique professional backgrounds and contexts. This diversity of practice makes it challenging to develop a one-size-fits-all credential that adequately captures the breadth and depth of evaluation expertise.

Despite the absence of regulation and the challenges associated with variability in evaluation practice, the discussion on professionalization remains relevant and important. It highlights the need to promote high-quality evaluation practices, ethical standards, and

continuous professional development within the field. While a traditional credential may not be feasible or appropriate in the evaluation context, there are alternative avenues to enhance professionalization, such as establishing professional associations, developing competency frameworks, promoting peer learning and mentorship, and fostering a culture of reflective practice.

Overall, the absence of regulation in evaluation underscores the need for careful consideration and adaptation when discussing professionalization and qualifications. It calls for a nuanced understanding of the unique characteristics and challenges of the field, and the exploration of innovative approaches to enhance the professionalism and effectiveness of evaluators while embracing the inherent variability and complexity of evaluation practice.

Evaluation as a Profession in the Context of Classification and Framing

The findings of the study summarized the many discussions regarding the status of evaluation as a profession, professionalization approaches, and the diversity of evaluators' backgrounds. These conversations have shed light on the variability in the "professionalization" of evaluation and the challenges it faces in establishing itself as a recognized and distinct field. These discussions extend to the Canadian context, where the evaluation professionalization context includes the world's first qualification approach. To comprehend the status of evaluation as a profession and the significance of credentials within the Canadian context, the application of the concepts of classification and framing from the field of sociology of education (Bernstein, 1973) provides valuable insights into the challenges and opportunities for professionalization in evaluation. By employing these concepts, we can gain a deeper understanding of the low classification and framing/boundaries within evaluation and explore the implications for the value of credentials to both individuals and the national sector in Canada.

The value of credentials in the evaluation profession extends to both individuals and the

national sector in Canada. However, the perception of this value varies among professionals,

reflecting different career goals and priorities. Some evaluation professionals emphasize formal

certifications as crucial for career advancement and professional recognition, while others

prioritize practical experience and demonstrated expertise. This diversity highlights the

multifaceted nature of professional development within the evaluation field.

In the national sector, the impact of credentials in evaluation is intertwined with broader

issues of recognition and standardization. Unlike professions such as doctors, evaluation lacks a

centralized regulatory body or mandatory licensing requirements, resulting in lower

classification and framing/boundaries. Consequently, evaluation professionals face challenges in

achieving consistent recognition and establishing clear professional boundaries. The absence of

unified standards and qualifications contributes to inconsistencies in evaluation practices and

blurs the distinction between evaluation and related fields, hindering the establishment of a

cohesive professional identity.

Classification and framing theory provide a lens to understand the unique dynamics of

evaluation professionalization in Canada. By applying these concepts to the evaluation field, it

becomes apparent that evaluation has lower classification and framing/boundaries compared to

other professions. The absence of a unified regulatory framework and standardized credentials

limits the extent to which evaluation is classified and framed as a distinct profession, further

contributing to the challenges faced in professionalization efforts. To address the challenges

arising from low classification and framing/boundaries, there is an opportunity to enhance

professional recognition and standardization within the evaluation field in Canada. Strengthening

classification and framing would result in clearer professional boundaries, increased consistency

in evaluation practices, and improved recognition of evaluation as a distinct and valued profession within the national sector. Such efforts would contribute to the overall growth and maturation of the evaluation field, facilitating its ability to provide reliable and impactful insights for evidence-based decision-making.

Applying classification and framing theory to the evaluation profession allows for a deeper understanding of the challenges it faces in terms of an identity which might be termed professional in the sense provided by trait theory and its subsequent recognition. By acknowledging the importance of classification and framing in shaping occupational boundaries and professionalization, efforts can be made to enhance the classification and framing of evaluation within the Canadian context. This would contribute to strengthening the professional identity of evaluation, establishing clearer boundaries, and facilitating the integration of evaluation expertise into decision-making processes at national and organizational levels.

Summary

This case assertion about the qualification approach and its functionality in evaluation explores the nuances of the qualification approach and applies the classification and framing theory (Bernstein, 1978). The research highlights the challenges in applying traditional qualifications to a dynamic and interdisciplinary field like evaluation. Instead of rigid credentials, the emphasis is currently on continuous professional development and adaptability to address the diverse demands of evaluation practice. The absence of regulation in the evaluation field presents additional complexities in establishing standardized credentials. However, despite this lack of regulation, the importance of promoting high-quality evaluation practices and ethical standards remains essential. Alternative avenues, such as professional associations and

competency frameworks, are in place and can be further developed to enhance the quality of practice within the field.

The study also examines the enactment of evaluation professionalization in the Canadian context, utilizing classification and framing theory. It reveals that evaluation has lower classification and framing boundaries compared to other professions due to the lack of a centralized regulatory body. This hinders the establishment of a clear professional identity and recognition for evaluators. Applying classification and framing theory offers valuable insights into addressing the challenges of professionalization in evaluation. Strengthening classification and framing can lead to clearer professional boundaries and increased recognition within the national sector. By acknowledging the uniqueness and complexity of evaluation practice, efforts can be directed towards enhancing the professionalism and effectiveness of evaluators, ultimately improving the quality and impact of evaluations in decision-making processes.

The Impact of Evaluation Professionalization is Multidimensional

The study's findings shed light on the multifaceted impact of evaluation professionalization within the Canadian case, particularly concerning the enactment of a qualification approach. The findings illustrated that the impact of evaluation professionalization is multidimensional and can be understood in the way qualifications are used, exchanged, or self-actualized and in terms of contribution to individual, national, and international impacts. This case assertion discussion overviews the multidimensional nature of the findings. In particular, to enhance the interpretation of findings, the use, knowledge and exchange theoretical framework (Fuller, 1994; Machell & Saunders, 2012; Oughton, 2010) can be used to understand the impact and value to evaluators. Further, the impacts are discussed in terms of their layered contribution at the individual, national and international level.

Use, Knowledge and Exchange Value

The present study aimed to explore the impact of evaluation professionalization using a Canadian case related to a qualification approach. When interpreting the findings, one can apply a sensemaking theoretical framework, which encompasses the dimensions of use value, exchange value, and self-actualization (Fuller, 1994; Machell & Saunders, 2012; Oughton, 2010) to understand the impact of evaluation professionalization on the positioning, practice, and employability of evaluators. The discussion on the role of credentialization or qualification in evaluation is crucial to understanding its impact on the evaluation field. This discussion revolves around the theoretical perspectives of use, exchange, and self-actualization, which shed light on the functions and implications of credentialization.

Firstly, applying the concept of *use* suggests that credentialization in evaluation serves as a means to assess and demonstrate competence and expertise. Obtaining a credential signifies that an evaluator has acquired the necessary knowledge, skills, and competencies to practice evaluation effectively. From a use perspective, credentialization provides a standardized measure of evaluation proficiency, allowing clients, employers, and stakeholders to identify qualified evaluators and make informed decisions about engaging their services. It establishes a level of trust and confidence in the evaluation profession, ensuring that evaluators possess the necessary qualifications to carry out their responsibilities.

Secondly, applying the concept of *exchange* highlights the value of credentialization in terms of professional recognition and opportunities. By obtaining a credential, evaluators enhance their professional status and increase their marketability. The credential becomes a form of currency in the evaluation field, facilitating professional networking, career advancement, and access to a broader range of evaluation projects and opportunities. From an exchange

perspective, credentialization creates a tangible benefit for evaluators, opening doors to new collaborations, higher positions, and increased visibility within the evaluation community.

Lastly, self-*actualization* considers the personal and professional development aspects of credentialization in evaluation. By pursuing and achieving a credential, evaluators demonstrate their commitment to continuous learning and growth in their field. The credential becomes a symbol of personal accomplishment and validates an evaluator's dedication to their professional development. From a self-actualization perspective, credentialization contributes to evaluators' sense of fulfillment and self-worth, fostering their intrinsic motivation to excel in their practice and contribute to the advancement of the evaluation profession.

These conceptual framework applications help describe and emphasize the multifaceted nature of credentialization in evaluation. It serves as a tool for assessing competence, a means of professional recognition, and a catalyst for personal and professional growth. The use, exchange, and self-actualization functions of credentialization align with the broader goals of professionalization in evaluation, such as establishing standards, fostering a sense of professional identity, and enhancing the overall quality and credibility of evaluation practice (Canadian Evaluation Society, 2023b).

The findings revealed that evaluators perceived a high level of use value resulting from their professionalization efforts, indicating that the acquired knowledge and skills were deemed practical and applicable to their work. However, the exchange value associated with their professionalization endeavors did not align with their expectations, as evaluators struggled to discern the tangible benefits in terms of employability or practice. Conversely, self-actualization emerged as a prominent factor, as evaluators experienced a sense of personal fulfillment and professional growth by undergoing a qualification approach.

The high use value observed in this study suggests that evaluation professionalization efforts effectively equip evaluators with the necessary knowledge and skills to enhance their practice. Through training programs, workshops, and credentialing processes, evaluators acquire valuable tools and methodologies that enable them to make informed decisions and provide meaningful insights in the evaluation process. The practical applicability of the acquired knowledge contributes to evaluators' perceived use value, positively impacting their confidence and competence in carrying out their professional responsibilities.

On the other hand, the study revealed a discrepancy between the high use value and the perceived exchange value of evaluation professionalization. Evaluators expressed their inability to discern the tangible benefits of their credential or professionalization efforts on their employability or practice, often noting they could not identify a specific value for themselves individually in many circumstances. Some evaluators were able to point to specific circumstances of being able to receive more "points" to bid on contracts, but this was very specific to federal government contracts. Some evaluators commented that since obtaining the credential they had received new or different employment but that it was difficult to discern whether this was a function of the credential or their growing knowledge, skills, or abilities. This disconnect may be attributed to various factors, including the lack of recognition of evaluation credentials in certain contexts or the absence of clear career advancement opportunities within the evaluation field that require a qualification versus the relevant experience. Certainly, those not in the Canadian context highlighted the importance of relevant experience and skill in obtaining work and noted it to be one of the most important elements of professionalization efforts. Without a clear link between professionalization efforts and desired outcomes such as

improved job prospects or increased professional standing, evaluators may question the value of investing time and resources in the approach, as may other evaluation governing bodies.

Despite the disparity in exchange value, the study highlighted the significant impact of evaluation professionalization on evaluators' self-actualization. By engaging in a qualification approach and actively pursuing their professional development, evaluators reported a heightened sense of self-worth and professional identity. Through reflective practice, expanding their knowledge base, and continuously improving their skills, evaluators experienced personal fulfillment and a stronger connection to their chosen profession. The pursuit of self-actualization motivated evaluators to invest in their professional growth and contributed to a sense of pride and satisfaction in their work. Equally, evaluators who had participated in the qualification approach in Canada noted benefits to the field of evaluation – that although there was limited exchange value, the self-actualization benefit may be contributing to more reflective and engaged evaluators.

These findings underscore the importance of considering both the tangible and intangible aspects of professionalization efforts in the evaluation field. While the high use value demonstrates the immediate impact of acquiring knowledge and skills, attention must be given to enhancing the perceived exchange value for evaluators. Stakeholders within the evaluation field, including professional associations, employers, and policymakers, may wish to establish clearer pathways for career advancement and recognize the value of evaluation credentials in different contexts. By aligning the exchange value with the demonstrated use value, evaluators will be more likely to view professionalization efforts as worthwhile and to continue investing in their professional development.

The findings of the study, analyzed through the lenses of use value, exchange value, and self-actualization (Fuller, 1994; Machell & Saunders, 2012; Oughton, 2010) have implications at both the individual and professional levels. At the individual level, evaluators who perceive high use value benefit from enhanced knowledge, skills, and confidence in their practice. This translates into improved performance, increased job satisfaction, and a sense of personal achievement. The discrepancy in exchange value highlights the potential for individual evaluators to advocate for the recognition of their credentials and professionalization efforts, leading to better career prospects and opportunities for advancement. Furthermore, the findings on self-actualization reveal that evaluators who engage in a qualification approach experience personal growth, a stronger professional identity, and a greater sense of purpose. This personal fulfillment translates into increased motivation, commitment, and passion for their work. As evaluators strive for self-actualization, they contribute to the advancement of the evaluation profession as a whole by continuously improving their practice, staying up to date with emerging methodologies and approaches, and actively seeking opportunities for collaboration and knowledge-sharing.

At the professional level, the high use value resulting from evaluation professionalization efforts benefits the field as a whole. Well-trained and knowledgeable evaluators contribute to the quality and effectiveness of evaluations, leading to more reliable and actionable findings. This, in turn, enhances the credibility and reputation of the evaluation profession, fostering trust among stakeholders and increasing the demand for evaluation services. The collective expertise gained through professionalization efforts elevates the standards and best practices within the evaluation field, ultimately benefiting organizations, policymakers, and society at large.

Addressing the gap found in exchange value has implications for the entire profession. For proponents of credentials, advocating for the recognition and value of evaluation credentials, professional associations and organizations can strengthen the status and influence of evaluators. Clear career pathways, professional recognition, and opportunities for advancement incentivize evaluators to invest in their professional development, attracting and retaining talented individuals within the evaluation field. This fosters a vibrant and dynamic professional community, promoting knowledge exchange, innovation, and collaboration, which are vital for addressing complex social challenges and driving positive change.

The discussion on what credentialization or qualification does for evaluation reveals its functions in terms of use, exchange, and self-actualization. These perspectives shed light on the importance and implications of credentialization in assessing competence, fostering professional recognition and development, and contributing to the overall professionalization of the evaluation field. The use of a sensemaking theoretical framework of use, exchange and self-actualization provided valuable insights into the findings of the study on evaluation professionalization. The high use value observed in evaluators' perceptions underscores the effectiveness of professionalization efforts in equipping evaluators with practical knowledge and skills. However, the discrepancy between the high use value and the perceived exchange value calls for concerted efforts to enhance the tangible benefits of professionalization in terms of employability and professional recognition. The findings emphasized the significance of self-actualization, as evaluators experience personal fulfillment and professional growth through a qualification approach. By acknowledging and leveraging these findings, evaluation professionalization can be further optimized to meet the evolving needs and aspirations of evaluators, ultimately contributing to the advancement and credibility of the evaluation field.

Individual, National, and International Impacts

Understanding the impact of evaluation professionalization discovered through the study at various levels offers valuable insights into the field. At the individual level, the study revealed the profound influence of professionalization on evaluation practice. It highlighted how qualifications, such as certifications and credentials, shape evaluators' professional identities, expertise, and adherence to ethical standards. The study explored how professionalization efforts provide evaluators with a framework for developing and refining their skills, knowledge, and competencies, ultimately enhancing the quality and effectiveness of their evaluation work.

On a national level, the study underscored the implications of professionalization for evaluation practice within specific countries or regions. It elucidated how professionalization efforts contribute to the establishment of evaluation as a recognized profession, with standardized practices, guidelines, and codes of conduct. The study examined how the development of national evaluation associations and the implementation of a credentialing system create pathways for evaluators to demonstrate their competence, establish professional networks, and advocate for evaluation as a valuable discipline within their respective countries.

Moreover, at an international level, the study highlighted the global nature of professionalization and its implications for the evaluation field as a whole. It emphasized the interconnectedness and exchange of knowledge, best practices, and professional standards across borders. The study explored how international evaluation associations and networks play a crucial role in promoting collaboration, fostering cross-cultural understanding, and advancing the professionalization agenda worldwide.

By examining the impacts of professionalization on the individual, national, and international levels, this study provides a nuanced understanding of the multifaceted functions that

qualifications serve within the evaluation field. It underscores the importance of

professionalization in elevating the professionalism, credibility, and consistency of evaluation

practice, while also acknowledging the diverse contexts and global perspectives that shape the

professionalization landscape. Ultimately, these findings contribute to the ongoing discourse and

efforts to advance the evaluation profession, both locally and globally.

Summary

The study revealed how the enactment of qualifications in evaluation can be used as a

means to assess and demonstrate competence and expertise. By pursuing and obtaining

credentials through professionalization efforts, evaluators can acquire the necessary knowledge,

skills, and competencies to elevate their practice. This use value of evaluation credentials

extends beyond individual evaluators, permeating the evaluation field as a whole, where clients,

employers, and stakeholders can identify qualified evaluators and make informed decisions about

engaging their services. As a result, evaluation professionalization through a credential is

perceived as increasing the credibility and trustworthiness of the evaluation profession in

Canada, ensuring that evaluators possess the necessary qualifications to provide meaningful

insights and evidence-based recommendations.

Moreover, the exchange value of evaluation professionalization has had significant

implications for evaluators' professional recognition and career opportunities. Through their

commitment to continuous learning and pursuit of qualifications, evaluators enhance their

marketability and increase their access to diverse evaluation projects and collaborations. The

credentials attained through professionalization efforts become valuable currency, facilitating

career advancement and networking within the evaluation community. The exchange value of

these qualifications has contributed to a growing community of engaged and skilled evaluators in

Canada, leading to a more vibrant and interconnected evaluation ecosystem. Beyond the tangible benefits, evaluation professionalization, though credentialism, has also had a profound impact on evaluators' self-actualization. Engaging in a qualification approach and investing in their professional development can lead to personal growth and a strengthened sense of professional identity. Evaluators experience a heightened sense of fulfillment and purpose, fueling their intrinsic motivation to excel in their practice. This self-actualization aspect of evaluation professionalization has resulted in a reflective and engaged group of evaluators, eager to contribute their expertise and insights to the advancement of the evaluation profession.

At the national level, the impact of evaluation professionalization is evident in the establishment of evaluation as a recognized and distinct profession in Canada. The development of national evaluation associations and the implementation of a credentialing system has provided evaluators with a clear framework for professional growth and recognition. These efforts have led to more standardized practices, guidelines, and codes of conduct that shape the evaluation landscape, working to ensure consistency and high-quality evaluation work across various sectors and domains. Internationally, the impact of evaluation professionalization extends to the exchange of knowledge and best practices.

In summary, the findings from the study demonstrate that the impact of evaluation professionalization within the Canadian case is multidimensional and far-reaching. Professionalization efforts have resulted in the effective use of qualifications to assess and demonstrate competence, elevated professional recognition, and career opportunities for evaluators, and fostered a sense of personal growth and fulfillment. At the national and international levels, professionalization has been perceived to contribute to the establishment of evaluation as a recognized profession. Ultimately, the ongoing process of evaluation

professionalization has changed the fabric of understanding and practice for evaluators in

Canada, elevating the credibility, quality, and influence of the evaluation field while nurturing a

community of passionate and skilled evaluators.

Chapter Summary

Chapter five presents a comprehensive analysis of the empirical findings from Chapter

four, employing a thematic approach to unveil the meaning and implications of the research.

Going beyond surface-level observations, the chapter delves into underlying patterns,

interrelationships, and overarching themes within the dataset. Thematic understanding allows for

a higher plane of interpretation, revealing the significance of the research findings. The

discussion in this chapter centered on synthesizing the research findings into case assertions.

First exploring evaluation as a social construct and its implications for professionalization. Then

by examining qualification approaches and their functionality in evaluation, highlighting the

challenges in applying traditional credentials to this dynamic field. Finally, by depicting and

exploring the impacts of evaluation are multidimensional and having value in terms of use,

knowledge, exchange and at the individual, national and international level. The next chapter

discusses the implications of the case assertions.

Chapter 6: Implications and Conclusion

The core aim of this research was to thoroughly examine the impact of

professionalization on evaluation in Canada, specifically honing in on the PDP (CE designation)

provided by the Canadian Evaluation Society. The study involved a meticulous analysis to

uncover the implications of these professionalization initiatives. In this chapter, the research

findings, case assertions, and concluding thoughts are outlined. Based on the research summary

provided, several implications emerge regarding the professionalization of evaluation in Canada.

These implications highlight the significance of professionalization efforts and their potential

impact on the evaluation field.

Addressing the Research Questions

Based on the data, the impact of evaluation professionalization in Canada as enacted

through the PDP (CE designation) offered by the Canadian Evaluation Society has had a mixed

impact on the positioning of evaluation, the evaluative practice of evaluators, and employability

of evaluators. While the CE designation may not be considered a need-to-have credential for

employability, it has had some impact on the evaluation profession, particularly in niche areas

such as government evaluation units and organizations that position themselves as requiring the

credential. The federal government has also sometimes required or preferred the CE designation

in job postings and RFPs, which could impact employability. Having the CE designation could

give evaluators an advantage in RFPs and job opportunities where it is listed as a preferred

qualification or could earn points towards winning the project. However, the impact may vary

depending on the specific job or project. Evaluators commented on the limited direct impact of

the credential on their employability.

In terms of practicing with the designation, it seems that the CE has impacted evaluators'

practices in Canada by providing a recognized standard of evaluation knowledge and expertise.

The CE designation is preferred or required in some government job postings or RFPs and may

provide an advantage in competitive bids. However, it is not considered a necessity for

employability in the evaluation field, but rather a "nice to have" credential. It is unclear how the

CE has specifically impacted the day-to-day work of evaluators who hold the designation. It is

possible that the CE has enhanced their skills and knowledge, but more information is needed to

draw conclusions about its direct impact on their practices.

The CE designation may not have a significant impact on the evaluative practice of evaluators or the positioning of evaluation as a whole, but it could impact employability in certain situations. Overall, it appears that the CE designation has increased the visibility and recognition of evaluation as a profession in Canada and provided a standard of knowledge and expertise for evaluators. However, its impact on employability may be limited and its specific impact on evaluators' practices requires further investigation.

Further, research results point to three important case assertions and thematic understanding of the broader impact of evaluation professionalization. Particularly as it relates to the learnings that evaluation is a social construct which has implications for professionalization efforts, that there are barriers to qualification approaches and their functionality in evaluation currently, and that the impact of evaluation professionalization in Canada is multidimensional. The implications of the research are discussed below.

Implications

Social Construct to Defined Profession

The recognition of evaluation as a social construct has significant implications for its professionalization. As a social construct, evaluation is shaped by social interactions, values, and norms within a given context. This understanding challenges the establishment of clear boundaries and a universally agreed-upon definition of evaluation, making the enactment of professionalization a complex process. The diverse nature of evaluation work, varying contexts, and multiple stakeholders involved contribute to the complexity of defining and professionalizing evaluation. Additionally, the social construct nature of evaluation raises questions about power dynamics and who holds the authority to shape the profession. The criteria for credentials and qualifications can be influenced by dominant voices and perspectives,

potentially excluding alternative viewpoints and approaches. It implies that attempts to professionalize should consider a broad range of cultural, social, and contextual factors to promote inclusivity and relevance in evaluation practice. Evaluators from different backgrounds, training, and countries bring diverse perspectives on professionalization, emphasizing the need for ongoing dialogue and critical examination of qualification approaches. Experiencing a credentialing system, such as in Canada, significantly shapes evaluators' social construct of evaluation and their professional identity. While credentialing systems provide standards and guidelines, they should be critically examined to avoid reinforcing biases and exclusionary practices. Recognizing evaluation as a social construct calls for an inclusive and dynamic approach to professionalization that considers diverse perspectives and adapts to changing societal needs.

The research on the position, practice, and employability of evaluators, considering evaluation as a social construct, yielded several noteworthy implications that have influenced its evolution and recognition. One significant outcome was the enriched understanding of evaluation as a socially constructed concept. This perspective shed light on the dynamic nature of the profession, showcasing its responsiveness to evolving societal values and needs. Moreover, the research contributed to describing the development of a more inclusive and comprehensive definition of the evaluation profession. By acknowledging its social construct, the research highlighted the diverse roles and skills evaluators brought, leading to a deeper appreciation for their contributions. This recognition, in turn, can help to pave the way for broader criteria for assessing professional competency and bolstered the credibility of evaluators within a flexible framework.

The exploration of evaluation as a social construct prompts discussions about the need for a balance between adaptability and standardized practices. The research identified instances where unclear boundaries hindered the establishment of the profession's identity and role in interdisciplinary contexts. This can stimulate conversations about guidelines and educational paths to ensure coherence while respecting the evolving societal landscape.

There are also policy considerations. Viewing evaluation as socially constructed may inform the formulation of policies that allow flexibility in approaches while maintaining a foundational level of shared understanding. This approach empowers evaluators to navigate diverse cultural and contextual nuances while adhering to common ethical and professional standards.

Low Classification and Framing Boundaries Implications

The research has explored the application of the concepts of classification and framing from the field of sociology of education (Bernstein, 1978) to that of evaluation. The application of these concepts in the context of the study has revealed the low classification and framing/boundaries within the evaluation profession. This finding has implications for both supporters and critics of the credential within the Canadian or International contexts.

Proponents of an essentialist view on the evaluation profession would highlight that the absence of a centralized regulatory body and standardized credentials contributes to the challenges faced in establishing a clear professional identity and recognition for evaluation professionals. In addition, the lack of classification and framing/boundaries is viewed as hindering the distinction of evaluation from related fields and limits its ability to establish professional standards and communicate its value effectively. The value of credentials in evaluation varies among professionals, reflecting different career goals and priorities. Within the

Canadian context, it is compulsory or incentivizing in certain federals contexts for work and thus becomes a requirement for those wanting to compete in the tender. At the national level, the absence of unified standards and qualifications may result in inconsistencies in evaluation practices and blur the boundaries between evaluation and other fields. This ambiguity is viewed as impacting the quality and consistency of evaluation work and may pose challenges in articulating the role and expertise of evaluation professionals.

Contrastingly, those who hold the view that evaluation should not be tightly bound by standardized credentials present a different perspective. For them, the absence of a centralized regulatory body and standardized credentials allows for a more inclusive and diverse range of individuals to engage in the evaluation profession. To these individuals, the malleability of evaluation's boundaries reflects its responsiveness to the ever-changing landscape of societal needs and values. In this light, the identified low classification and framing could be seen as an indicator of success rather than a limitation, as it mirrors the dynamic and socially constructed nature of the evaluation profession. This approach values the contributions of practitioners who might possess unconventional yet valuable insights and expertise that cannot be easily encapsulated within rigid credentialing structures. In the Canadian context, where certain federal contexts may mandate or encourage credentialing, this could inadvertently limit the pool of potential evaluators, excluding those who offer unique perspectives. Moreover, the absence of standardized credentials might encourage professionals from various disciplines to contribute their interdisciplinary skills to the field of evaluation, fostering innovation and fresh approaches. This non-traditional view contends that the flexibility in evaluation's boundaries could actually enhance its adaptability to a changing landscape and enable it to tackle complex, multifaceted challenges that conventional credential-based approaches might overlook.

The low classification and framing of the evaluation profession have implications for the overall practice of evaluation on either side of the debate. The lack of clear boundaries and standardized qualifications can lead to ambiguity and confusion in defining the scope of evaluation work. This ambiguity may impact the quality and consistency of evaluation practice, making it difficult to ensure a standardized approach across different evaluation initiatives. Without well-defined professional boundaries, evaluation professionals may encounter challenges in articulating their role, distinguishing their expertise, and effectively communicating the value of evaluation to stakeholders. Equally, this presents an opportunity to capitalize on diverse perspectives, flexibility in approach and a wide range of evaluation skills. To embrace the diverse perspectives within the evaluation profession, there could be thoughtful considerations towards reinforcing classification and framing. This gentle alignment could potentially lead to a more nuanced understanding of professional boundaries, fostering an environment where a variety of evaluation practices and viewpoints are appreciated. This would contribute to clearer professional boundaries, increased consistency in evaluation practices, and improved recognition of evaluation as a distinct and valued profession within the national sector. This inclusive approach might gently guide the field toward greater consistency in practices while still respecting the richness that diverse backgrounds can offer. As classification and framing are enhanced, it is likely that the recognition of evaluation as a valuable and distinctive profession in the national sector will gently improve as well. This nurturing of classification and framing could, in turn, contribute to the evolution of the evaluation field, making it even more capable of providing a wide range of valuable insights to support evidence-based decision-making.

The absence of regulation in evaluation creates complexities but does not diminish the importance of promoting high-quality practices and ethical standards. Alternative avenues such as professional associations and competency frameworks are available to enhance professionalism within the field. The leveraging of professional associations, competency frameworks and public definitions of evaluation can contribute to enhancing the classification and framing boundaries of the profession without approaching the essentialist view of evaluation. For Canadian evaluators, whose professional association has gone down the path of a globally contentious credentialling process, the credential itself strengthens classification and framing boundaries and contributes to the support of evaluation quality in Canada by providing a benchmark of competence. The credential provides an identity and recognition for evaluators. The path of credentialling has implications for the evaluation field about what counts as evaluation and evaluation quality and for proponents of credentialling, it must be highlighted that there are multiple perspectives and good quality evaluations and evaluators occurring outside this system.

The research findings regarding the position, practice, and employability of evaluators within a system characterized by low classification and framing boundaries had several noteworthy implications. The study illuminated the diverse roles and skills that evaluators brought to the profession, transcending traditional confines and enriching the field with innovative perspectives from various backgrounds. Furthermore, the research revealed the challenges evaluators encountered in establishing their professional identities and defining the profession due to the ambiguous boundaries. These insights have prompted discussions on the need for clearer career pathways and more defined roles within the evaluation field.

The research findings also emphasized the value of cultivating adaptable skills and promoting interdisciplinary collaboration among evaluators. With the boundaries between evaluation and related fields becoming more fluid, the study highlighted the importance of versatile skills that enabled evaluators to contribute effectively in diverse contexts. This prompted discussion about the types of training and education that could enhance the employability and relevance of evaluators within this dynamic landscape.

The research findings encourage a balance between embracing the flexibility of low classification and framing boundaries while recognizing the need for some degree of standardization. Policy and practice considerations can be influenced by these discussions, resulting in a more inclusive and adaptable evaluation profession that still maintains a certain level of consistency and recognition across various settings.

Implications On Shaping of the Evaluation Field in Canada

Overall, the implications drawn from the research indicate that evaluation professionalization has the potential to shape the evaluation field in Canada and internationally. By prioritizing continuous learning, recognizing professional identity, and fostering an engaged community, the evaluation profession can evolve and thrive while maintaining high standards of practice and ethics. The study's insights can guide policymakers, evaluators, and stakeholders in developing strategies to strengthen and promote professionalization efforts, ultimately leading to improved evaluation outcomes and greater societal impact.

From the standpoint of those who support credentials, the research carries significant implications that underscore the importance of continuous learning, professional identity, and community engagement in advancing the evaluation profession. By advocating for and implementing strategies that prioritize ongoing education and skill development, professionals in

the field can remain attuned to the evolving demands of the Canadian context. This approach, as evidenced by the study's findings, empowers evaluators to provide more informed, relevant, and effective evaluation services that align with the country's dynamic needs. Furthermore, the research underscores the critical role of recognizing and strengthening the professional identity of evaluators. By establishing clear and standardized credentials, the profession can bolster its credibility and reputation, enhancing public trust and encouraging broader adoption of evaluation recommendations. This recognition not only ensures higher standards of practice and ethics but also contributes to a more cohesive community of evaluation professionals who share a common foundation of knowledge and expertise.

Moreover, the research highlights the value of fostering an engaged community within the evaluation profession. By providing platforms for networking, collaboration, and knowledge exchange, the field can encourage a vibrant exchange of ideas, methodologies, and best practices. This collective learning environment serves as a catalyst for innovation, enabling evaluators to collectively address complex challenges and share insights from diverse perspectives. The insights gleaned from the research hold the potential to guide various stakeholders, including policymakers, evaluators, and other relevant parties. Policymakers can leverage these findings to shape policies that encourage the integration of standardized credentials and continuous professional development, thereby strengthening the evaluation profession's foundation. Evaluators themselves can use this information to advocate for their profession's growth and improvement, aligning their efforts with the study's recommendations.

That said, the research on evaluation professionalization has shed light on the complexity of qualifications and their functionality in the field of evaluation. Unlike traditional professions with rigid qualifications, evaluation draws on a wide range of skills and knowledge from various

disciplines. The interdisciplinary and permeable nature of evaluation challenges the notion of a standardized qualification. For those who do not support a credential-based approach in evaluation, the research on evaluation professionalization offers insightful implications that highlight the multifaceted nature of qualifications and their role in the field. The research has illuminated the intricate landscape of qualifications in evaluation, revealing its departure from traditional professions characterized by rigid credential requirements. In contrast to conventional fields, evaluation draws upon a diverse spectrum of skills and knowledge from various disciplines, reflecting its interdisciplinary nature. This intricate and adaptable facet of evaluation challenges the applicability of standardized qualifications, as the profession's fluid boundaries necessitate a more flexible approach. As such, the emphasis shifts towards continuous learning, ongoing professional development, and the ability to adapt to the evolving demands of diverse evaluation contexts.

The absence of regulatory bodies in evaluation adds another layer of complexity, making the establishment of a universally recognized credential challenging. The dynamic nature of evaluation practice, spanning a wide spectrum of methodologies and approaches, further complicates the notion of a one-size-fits-all qualification that can encompass the breadth and depth of expertise required. However, despite these challenges, the dialogue surrounding professionalization remains pertinent. The research findings emphasize that the pursuit of professionalism in evaluation can take alternative avenues beyond standardized credentials. Professional associations, for instance, can play a pivotal role in fostering a sense of community, offering platforms for peer learning, and sharing best practices. Competency frameworks can provide a flexible guide for skill development and assessment, accommodating the diverse skill sets required in evaluation. Encouraging reflective practice within the profession contributes to

ongoing self-improvement and refinement of skills, ultimately enhancing the professionalism of evaluators.

While the complexities of qualifications in evaluation challenge the feasibility of a rigid credential-based approach, the research underscores that the pursuit of professionalism remains essential. Alternative pathways, rooted in continuous learning, interdisciplinary adaptability, and community engagement, can collectively contribute to the elevation of evaluation as a field that consistently delivers high-quality practices and upholds ethical standards.

The research outcomes highlight that the enactment of evaluation professionalization has the potential to positively shape the evaluation landscape in Canada and beyond. The study's insights underscore the importance of continuous learning, professional identity recognition, and fostering an engaged community. For proponents of credentials, this perspective empowers professionals to meet evolving demands and deliver effective evaluation services. Clear and standardized credentials enhance credibility, building a cohesive community of knowledgeable experts. Conversely, the research recognizes that evaluation's interdisciplinary and fluid nature challenges a one-size-fits-all qualification approach. Despite the absence of regulatory bodies, discussions on professionalization remain relevant. Alternative pathways like professional associations, competency frameworks, and reflective practice can enhance professionalism in evaluation. While complexities deter a rigid credential-based approach, a commitment to professionalism through adaptable learning and community engagement remains pivotal. Ultimately, this dual perspective underscores that while qualifications may vary, the pursuit of excellence and ethical standards in evaluation endures.

Implications for Enhancing Credibility and Quality

The study underscores the importance of professionalization in elevating the credibility and quality of evaluation practices. By emphasizing continuous professional development and adapting to the diverse demands of evaluation, the evaluation field can maintain high standards of competence and ethics. This includes the value of continuous learning and pursuit of qualifications for evaluators. Encouraging evaluators to invest in their professional development can lead to personal growth, self-actualization, and a sense of purpose in their practice.

The absence of standardized qualifications in evaluation highlights the importance of professional associations and networks. These platforms provide opportunities for evaluators to exchange knowledge, share best practices, and engage in peer learning. By fostering a sense of community and collaboration, professional associations contribute to the professionalization of evaluation and the enhancement of evaluation practice. Additionally, the variability in evaluation practice and the lack of regulatory oversight underscores the significance of ethical standards and self-regulation within the field. Evaluators can prioritize ethical considerations, ensuring transparency, fairness, and accountability in their work. Emphasizing ethical guidelines and promoting a culture of reflective practice helps maintain professional integrity and enhances the credibility of evaluation as a discipline.

The research on the position of evaluation, practice, and employability of evaluators in Canada offers critical implications for both supporters and non-supporters of credentials. For those advocating credentials, the study emphasizes the pivotal role of professionalization in bolstering the credibility and excellence of evaluation practices. By promoting continuous professional development and adaptability to the multifaceted demands of evaluation, the field can uphold rigorous standards of competence and ethics. This underscores the significance of

continuous learning and the pursuit of qualifications among evaluators. Encouraging evaluators to invest in their ongoing growth not only fosters their professional expertise but also promotes personal development, self-actualization, and a heightened sense of purpose in their practice.

Conversely, the absence of standardized qualifications underscores the significance of alternative avenues such as professional associations and networks. These platforms serve as vital spaces for evaluators to exchange knowledge, share best practices, and engage in peer learning. By cultivating a sense of community and fostering collaboration, professional associations play an essential role in advancing the professionalization of evaluation and enhancing the quality of evaluation practice. Additionally, the variability in evaluation practices and the lack of regulatory oversight highlight the paramount importance of ethical standards and self-regulation within the field. In the absence of strict credentials, it becomes crucial for evaluators to prioritize ethical considerations, ensuring transparency, fairness, and accountability in their work. The study reinforces the value of ethical guidelines and the promotion of a culture of reflective practice, vital components that safeguard professional integrity and contribute to the credibility of evaluation as a distinct discipline.

In conclusion, the research underlines that both supporters and non-supporters of credentials must acknowledge the nuances and challenges inherent to the field of evaluation. Professionalization efforts necessitate innovative approaches that embrace the unique characteristics of evaluation while fostering its growth and credibility. By embracing continuous learning, community engagement, ethical practices, and self-regulation, the evaluation profession can effectively navigate these complexities and work towards a more standardized and respected position in the Canadian landscape and beyond.

Implications for a Recognized Professional Identity

The research presents noteworthy implications for both supporters and non-supporters of credentials as a way to enact evaluation professionalization, particularly concerning the establishment of a recognized professional identity. The research revealed that Canadian evaluators possess a sense of professional identity, albeit within the context of certain low classification and framing boundaries. Notably, the absence of a centralized regulatory body has been viewed as contributing to challenges in solidifying a distinct professional identity. Strengthening classification and framing boundaries emerges as a potential strategy to enhance the recognition of evaluation as a unique and valuable profession. The study's implications hold significant relevance for the advancement of the evaluation field, particularly in terms of establishing a recognized professional identity.

For proponents of credentials, the research suggests several key strategies. Firstly, the study underscores the significance of creating a sense of belonging within the evaluator community. Establishing strong connections among evaluators fosters an environment where knowledge sharing, collaboration, and best practices thrive. Professional associations, conferences, and online communities serve as conduits for enhancing this sense of belonging, promoting unity, and facilitating collective growth. Moreover, the research highlights the pivotal role of external recognition for the evaluation profession's distinct value. Acknowledgment from stakeholders, employers, policymakers, and the public reinforces the specialized expertise that evaluators contribute to evidence-based decision-making. This recognition not only elevates the standing of the field but also stimulates greater demand for evaluation services and improves career opportunities for evaluators. Additionally, the study underscores the importance of clear and well-defined boundaries for the evaluation profession. Clearly outlined boundaries enable

evaluators to confidently identify themselves within their role and enable others to understand

and appreciate the scope of evaluation work. Role ambiguity is reduced, and effective

communication about the value of evaluators' contributions becomes more accessible across

various domains and projects.

For those who do not support credentials or the qualification professionalization

approach, the research resonates with their perspective by emphasizing the significance of a fluid

professional identity. While advocating for a less rigid framework, these implications align with

their perspective on the importance of fostering a sense of belonging, acknowledging the distinct

contributions of evaluation, and maintaining clear boundaries within a context of adaptability

and diversity. This could be considered in the context of the development of a community

practice of like-minded individuals. The research findings highlight that a rigid qualification-

based approach might not entirely align with the intricate realities of the evaluation profession.

Unlike traditional professions, evaluation draws from a diverse array of skills and knowledge

from various disciplines. The study's implications emphasize that the interdisciplinary and

permeable nature of evaluation challenges the conventional notion of a standardized

qualification. Instead, the emphasis shifts towards continuous learning, professional

development, and adaptability to navigate diverse evaluation contexts. The research underscores

that the absence of a centralized regulatory body in evaluation complicates the establishment of a

universally recognized credential. The study's implications highlight that the variability in

evaluation practice and the lack of regulatory oversight further challenges the feasibility of

standard qualifications. The dynamic nature of evaluation practice spans a wide spectrum of

methodologies and approaches, making it challenging to define a one-size-fits-all qualification

that captures the breadth and depth of expertise required. The research findings shed light on

alternative pathways that can contribute to enhancing professional identity in evaluation. These alternatives provide avenues for fostering a sense of community, facilitating skill development, and promoting ongoing learning and growth among evaluators.

In conclusion and from a prescriptive point of view, the research presents implications for establishing a recognized professional identity within the evaluation field, resonating with both proponents and non-proponents of credentials. Ultimately, these implications underscore the need for adaptable strategies that foster belonging, acknowledge unique contributions, and define clear parameters, all aimed at advancing the evaluation field, its credibility, and its responsiveness to diverse stakeholder needs. Overall, it is clear that evaluation is considered a recognized profession by evaluators in Canada and internationally, and that recognition should be extended and described in flexible ways to enhance the profile of the profession.

Implications for the Broader Scholarly Context

The research implications extend beyond the confines of the evaluation field, offering valuable contributions to the broader scholarly context by shedding light on the multifaceted impact of evaluation professionalization. The insights gleaned from this study hold the potential to enrich discussions and research pertaining to professionalization endeavors in various domains. Notably, this research stands out as a distinctive scholarly endeavor that delves into the intricacies of evaluation professionalization, setting it apart from the plethora of position papers and debates that have characterized the discourse. This study's unique approach, encompassing primary data collection to comprehensively understand evaluation professionalization in the Canadian context, expands the scope of existing literature and anecdotal understanding.

Furthermore, the emerging findings from this research resonate with implications for ongoing attempts to develop a field of practice using "professionalization" as a conceptual

driving force both within Canada and across international jurisdictions. The study's revelations

thus transcend the specific context to provide valuable insights that have the potential to shape

professionalization discussions and practices in diverse fields and geographical regions. The

emerging findings have implications for continued professionalization efforts in Canada and in

other international jurisdictions. The emerging findings hold implications for the ongoing

professionalization endeavors not only in Canada but also in various international jurisdictions.

Notably, Canada's path to professionalization has followed a distinctive trajectory, marked by

specific experiences and challenges. These unique aspects of the Canadian professionalization

journey have provided valuable insights and lessons that can be shared with other countries and

regions seeking to advance the professionalization of evaluation. By analyzing the Canadian

experience, we can identify strategies, practices, and potential pitfalls that can inform and guide

the enactment of similar professionalization efforts globally. Understanding how Canada

navigated the complex terrain of evaluation professionalization through a specific lens of a

credential, while considering the diverse cultural and contextual factors at play, can offer

valuable lessons for policymakers, practitioners, and stakeholders in other parts of the world.

This cross-pollination of knowledge and shared experiences can contribute to the development of

more effective and contextually relevant approaches to advancing the field of evaluation as a

recognized and respected profession on a global scale.

The research's exploration of the position of evaluation, practice, and employability of

evaluators in Canada provides insights that resonate in the broader scholarly context. By

shedding light on the intricate dimensions of evaluation professionalization, the study contributes

to ongoing discussions and research efforts aimed at professionalization endeavors across

various domains. This research is a distinctive scholarly pursuit, by investigating the

complexities of evaluation professionalization through primary data collection in the Canadian

context, surpassing the realm of mere position papers and debates. Moreover, the research's

emergent findings hold implications that span not only within Canada but also across

international borders. The research has potential to influence discussions and practices in diverse

fields, underscoring its significance in shaping the ongoing dialogue and advancement of the

global evaluation community's pursuit of professionalization.

References

Altschuld, J.W. (2005) Certification, credentialing, licensure, competencies, and the like: issues

confronting the field of evaluation. *Canadian Journal of Program Evaluation*. 20(2), 157–

68.

Altschuld, J.W. & Austin, J.T (2005) Certification. In: Mathison S (ed.) *Encyclopedia of

Evaluation*. Thousand Oaks: Sage, 49–50.

Anderson, S. B., & Ball, S. (1978). The Profession and Practice of Program Evaluation.

Bernstein, B. (1973). On the Classification and Framing of Educational Knowledge. In

Knowledge, Education, and Cultural Change. Routledge.

Bernstein, B. (2018). On the classification and framing of educational knowledge.

In Knowledge, education, and cultural change. Routledge., 365-392

Bickman, L. (1999). AEA, bold or timid? *American Journal of Evaluation*. 20(3), 519–20.

Bourgault, J. & Parent, E. (2008). Inspiring exemplary practices in Canada: Ken Kernaghan's

contribution to professionalism, pride, and recognition. In Siegel D and Rasmussen K (eds)

Professionalism and Public Service. Toronto: University of Toronto Press, 152–73.

Brock, D.M., Powell, M. and Hinings, C.R. 2007, Archetypal change and the professional

services firm. *Research in Organisational Change and Development*. 16, 221 -251.

Buchanan, H. (2015). A made-in-Canada credential: Developing an evaluation professional

designation. *The Canadian Journal of Program Evaluation*. 29. 10.3138/cjpe.29.3.33.

Brower, K. L. (2016). Promoting Evaluation Utilization in Developmental Evaluation: A Case

Study Exploring Organizational Conditions. https://era.library.ualberta.ca/items/ee6c9a74-

f178-4fae-a189-e34df4af0d9d/view/e8240a39-2282-44de-823a-

36031893ad37/Brower_Krista_L_201609_MEd.pdf

Burr, V., & Dick, P. (2017). Social constructionism. *The Palgrave Handbook of Critical Social Psychology*, 59-80.

Canadian Evaluation Society. (2023a). *About the CE Designation*. Retrieved from Canadian Evalaution Society: https://evaluationcanada.ca/ce

Canadian Evaluation Society. (2023b). *Mission and Vision*. Retrieved from Canadian Evaluation Society: https://evaluationcanada.ca/mission-and-vision

Canadian Evaluation Society. (2023c). *What is Evaluation?* Retrieved from Canadian Evaluation Society: https://evaluationcanada.ca/what-is-evaluation

Carr-Saunders, A.M. & Wilson, P.A. (1933), The Professions, Clarendon: Oxford

Castro, M. P., Fragapane, S., & Rinaldi, F. M. (2016). Professionalization and evaluation: A European analysis in the digital era. *Evaluation*, 22(4), 489–507. https://doi.org/10.1177/1356389016667887

Cebrián, G., & Junyent, M. (2015). Competencies in education for sustainable development: Exploring the student teachers" views. *Sustainability, 7*, 2768-2786. doi:doi:10.3390/su7032768

Cousins, J.B., Cullen, J., Malik, S., & Maicher, B. (2009) Debating professional designations for evaluators: reflections on the Canadian process. *Journal of MultiDisciplinary Evaluation* 6(11), 71–82.

Creswell, J. W. (2013). Qualitative Inquiry & Research Design: Choosing Among Five Approaches. Los Angeles, CA: Sage Publications

Creswell, J. W., & Plano Clark, V. L. (2011). Designing and conducting mixed methods research (2nd ed.). Thousand Oaks, CA: Sage Publications.

Donaldson, S.I. (2001) Overcoming our negative reputation: evaluation becomes known as a

helping profession. *American Journal of Evaluation*. 22(3), 355–61.

Erault, M. 1994. Developing Professional Knowledge and Competence, London:

RoutledgeFarmer.

European Evaluation Society. (2021). *The EES Evaluation Capabilities Framework.* European

Evaluation Society.

European Evaluation Society. (2007). *EES Statement: The Importance of a Methodoloically*

Diverse Approach to Impact Evalaution - Specifically with Respect to Development Aid

and Development Interventions. London: European Evaluation Society.

Fierro, L., Galport, N., Hunt, A., Codd, H., & Donaldson, S. (2016). Canadian Evaluation

Society Credentialed Evaluator Designation Program Evaluation Report.

https://evaluationcanada.ca/txt/2016_pdp_evalrep_en.pdf

Friedson, E. (1970). Profession of Medicine: A Study of the Sociology of Applied Knowledge.

New York: Dodd, Mead.

Gauthier, B., Barrington, G. V., Bozzo, S. L., Chaytor, K., Dignard, A., Lahey, R., ... & Roy, S.

(2009). The lay of the land: Evaluation practice in Canada in 2009. *Canadian Journal of*

Program Evaluation, 24(1), 1-49.

Gauthier, B., Borys, S., Kishchuk, N., & Roy, S. N. (2006). Survey of evaluation practice and

issues in Canada. *Canadian Journal of Program Evaluation*. 21(3), 1-42.

Gauthier, B., Kishchuk, N., Borys, S. & Roy, S. (2015). The CES professional designations

program: Views from members. *Canadian Journal of Program Evaluation*. 29(3), 98-133.

doi: 10.3138/cjpe.29.3.98

Gauthier, B., Lahey, R. & Jacob, S. (2022). Evaluation in Canada. In Stockmann, R., Meyer, W. & Szentmarjay, L. (Eds.), *The Institutionalization of Evaluation in the Americas*, Springer Nature. https://link.springer.com/chapter/10.1007/978-3-030-81139-6_5

Goodrick, E. and Reay, T. 2011, Constellations of institutional logics: changes in the professional work of pharmacists, *Work and Occupations*. 38, 372-416.

Gopinath, R. (2020). Prominence of Self-Actualization in Organization. I*nternational Journal of Advanced Science and Technology*, *29(3)*, 11591-11602.

Greenwood, R., Suddaby, R. & Hinings C.R. 2002, Theorizing change: the role of professional associations in the transformation of institutionalised fields. *Academy of Management Journal*, 45(1), 58-80.

Halcomb, E.J. (2019), Mixed methods research: The issues beyond combining methods. *Journal of Advanced Nursing*, 75, 499-501. https://doi.org/10.1111/jan.13877

House, E.R. (1993) *Professional Evaluation: Social Impact and Political Consequences.* Newbury Park, CA: SAGE.

International Organization for Cooperation in Evaluation. (2022, August 18). *VOPE Directory*. Retrieved from IOCE: https://ioce.net/vopes/vope-directory/

International Organization for Coopertion in Evaluation. (2023, August 18). *5.1 Definition of the Professionalization of Evaluation*. Retrieved from VOPE Toolkit: https://vopetoolkit.ioce.net/en/section/51-definition-professionalization-evaluation

Iversen, R. R., Gergen, K. J., & Fairbanks, R. P. (2005). Assessment and Social Construction: Conflict or CoCreation?. Retrieved from https://repository.upenn.edu/spp_papers/27

Jacob, S. & Boisvert, Y. (2010). To Be or Not to Be a Profession: Pros, Cons and Challenges for Evaluation. *Evaluation*. 16, 349-369. 10.1177/1356389010380001.

Jamous, H. & Peloille, B. 1970. Changes in the French university-hospital system, pp 109-152

in J.Jackson (ed) Professions and Professionalisation, Cambridge: Cambridge University

Press

Jones, S.C., & Worthen, B.R. (1999) AEA members" opinions concerning evaluator

certification. *American Journal of Evaluation.* 20(3), 495–506.

Julnes, G., & Bustelo, M. (2017). Professional Evaluation in the Public Interest(s). American

Journal of Evaluation, 38(4), 540-545. https://doi.org/10.1177/1098214017729876

King, J. A. (2012, June). Is evaluation ready to become a profession? Who cares anyway?

Keynote delivered at the joint conference of the Centers for Disease Control and the

American Evaluation Association, Atlanta, GA.

Knight & Saunders (1999) Understanding teachers" professional cultures through interview: A

constructivist pproach. *Evaluation & Research in Education*, 13:3, 144-

156, DOI: 10.1080/09500799908666954

Lawman, A. (2021). The relevance of trait theory for the professionalisation of the new corporate

professions: a case study of project management (Doctoral dissertation).

Leicht, K.T. & Fennell, M.L. (2008), Institutionalism and the Professions, In Greenwood, R.,

Oliver, C., Suddaby, R. and Sahlin Anderson, K. Handbook of Organisational

Institutionalism, Thousand Oaks, CA: Sage Publications, 431 – 48.

Levin-Rozalis, M., & Shochot-Reich, E. (2008). Professional identity of evaluators in

Israel. *Canadian Journal of Program Evaluation*, 23(1), 141-177.

Machell, J. & Saunders, M. (2012). Quality, qualifications and the attribution of value in work

based learning. Quality Management and Qualification Needs 2: Towards Quality

Capability of Companies and Employees in Europe. Heidelberg: Physica-Verlag HD. 227-241.

Merwin, J. C., & Wiener, P. H. (1985). Evaluation: A profession?. *Educational Evaluation and Policy Analysis*, 7(3), 253-259.

Morais, A. M., & Neves, I. P. (2018). The quest for high-level knowledge in schools: revisiting the concepts of classification and framing. *British Journal of Sociology of Education*, 39(3), 261-282.

Morell, J. A., & Flaherty, E. W. (1978). The development of evaluation as a profession: Current status and some predictions. *Evaluation and Program Planning*, 1(1), 11-17.

Muzio, D., Brock, D.M. & Suddaby, R. (2013), Professions and Institutional Change: Towards an Institutionalist Sociology of the Professions, *Journal of Management Studies*, 50(5), 699-719.

Muzio, D. & Kirkpatrick, I. (2011). Reconnecting the study of professional organisations with the study of professional occupations, *Current Sociology*, 59, 389-405

Neto, M. (2015). Educational motivation meets Maslow: Self-actualisation as contextual driver. *Journal of Student Engagement: Education Matters*, *5(1)*, 18-27.

Nolin, J. (2008). In search of a new theory of professions (Vetenskap för profession). Högskolan i Borås. Retrieved from http://urn.kb.se/resolve?urn=urn:nbn:se:hb:diva-4373

Oughton, H. (2010). Funds of knowledge—A conceptual critique. *Studies in the Education of Adults* 42(1), 63-78.

Oppenheimer, M. (1973), Proletarianisation of the professional in Halmos, P. Professionalization Social Change, Keele University Press: Keele, 213 – 27.

Parsons, T. (1939). The professions and social structure. *Social forces*, 17(4), 457-467.

Patton, M.Q. (1990) The challenge of being a profession. *Evaluation Practice*. 11(1): 45–51.

Picciotto, R. (2011). The logic of evaluation professionalism. *Evaluation*, 17(2), 165–180.

   https://doi.org/10.1177/1356389011403362

Pinnington, A. and Morris, T. (2003), Archetype change in professional organisations: survey

   evidence from large law firms, *British Journal of Management*, 14. 85-99.

Pluim, G., Nazir, J., & Wallace, J. (2020). Curriculum integration and the semicentennial of

   Basil Bernstein" s Classification and Framing of Educational Knowledge. *Canadian*

   Journal of Science, Mathematics and Technology Education, 20, 715-735.

Quesnel, J. S., Senior Facilitator, U. N. S. S. C., & Québec, E. N. A. P. (2010). The

   professionalization of evaluation. From policies to results, 164.

Reed, M.I. 1996. Expert power and control in late modernity: an empirical review and theoretical

   synthesis. *Organisational Studies*, 17(4), 573-597

Saunders, M., (2011). Capturing effects of interventions, policies and programmes in the

   European context: A social practice perspective. *Evaluation*, 17(1), 89-102.

Saunders, M., "TVEI and the National Curriculum: Culture Clash between Use and Exchange

   Value", paper presented to the British Educational Research Association Conference,

   Stirling University, September 1992.

Schwandt, T. A. (2017). Professionalization, Ethics, and Fidelity to an Evaluation Ethos.

   American Journal of Evaluation, 38(4), 546-553.

   https://doi.org/10.1177/1098214017728578

Smith, N. L., Brandon, P. R., Hwalek, M., Kistler, S. J., Labin, S. N., Rugh, J., ... & Yarnall, L.

   (2011). Looking ahead: The future of evaluation. *American Journal of Evaluation*, 32(4),

   565-599.

Stake, R. E. (1995). The Art of Case Study Research. Thousand Oaks, CA: Sage.

Stevahn, L., King, J., Ghere, G., & Minnema, J. (2005). Establishing essential competencies for program evaluators. *American Journal of Evaluation*, 26(2), 43-59.

Suddaby, R., & Muzio, D. (2015). Theoretical perspectives on the professions. The Oxford handbook of professional service firms, 25, 47.

Wilcox, Y., & King, J. A. (2014). A professional grounding and history of the development and formal use of evaluator competencies. *Canadian Journal of Program Evaluation*, 28(3), 1-28.

Wilensky, H. (1964). The professionalisation of everyone? *American Journal of Sociology*, 70, 137-58.

Wolinsky. (1988). The Professional Dominance Perspective, Revisited. The Milbank Quarterly, 66(1988), 33–47. https://doi.org/10.2307/3349913

Worthen, B. R. (1994). Is evaluation a mature profession that warrants the preparation of evaluation professionals?. *New Directions for Program Evaluation*, 62, 3-15.

Yin, R. K. (2014). Case Study Research: Design and Methods (3rd ed.). Thousand Oaks, CA: Sage

Yan, Z., Wang, T., Chen, Y., & Zhang, H. (2016). Knowledge sharing in online health communities: A social exchange theory perspective. *Information & Management*, 53(5), 643-653.