



Canadian Evaluation Society

Société canadienne d'évaluation

Management practice

Canadian Evaluation Society - Group Mentoring Program to Support the Credentialed Evaluator (CE) Designation

**Material developed by Susanna Beaudin, CE and Judy Lifshitz, CE and PMP
in collaboration with the Credentialling Board 2025**

Important consideration

- You do not need to have “manager,” “team lead” or “supervisor” in your job description or title to have used management skills.
- Management can be demonstrated through your leadership on or within a line of evidence, and does not necessarily have to be management of an entire evaluation project.

4.1 Provides leadership to the evaluation project

Descriptors:

- Demonstrates accountability to the evaluation client and project participants.
- Promotes teamwork and sets team goals.
- Attends to emerging realities of the evaluation and addresses challenges.
- Manages conflict when necessary.
- Evaluates the overall performance of the team throughout the project.



Have your *Summary of Evaluation Experience* form handy!

4.1 Provides leadership to the evaluation project (example #1)

It is important that team members have access to evaluation data in ways that preserve confidentiality. To support **Project 1**, I volunteered to lead the development of a classification system for interview notes and coding sheets that allows us to protect confidentiality while sharing access to necessary data efficiently.

As an evaluator in a unit that does large-scale evaluations, I am generally in charge of a particular component, and try to show leadership in a collegial way. For example, I was recently tasked with conducting 30 interviews as part of the **Evaluation of Z Program**. In the process of the interviews, it became apparent that many interviewees had been told that the program was to be cut, and that the evaluation was a pretext to justify this. I documented my observations and shared them at an all-team meeting so that this challenge could be addressed by the team leader.

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4.1 Provides leadership to the evaluation project (example #2)

As an evaluation manager, I must ensure that evaluations proceed smoothly and produce timely results. For each evaluation, I set up a work plan that defines the roles and responsibilities of team members, as well as timelines for all milestones.

I encourage teamwork and mutual support among team members so that they can solve problems together. For example, in the **Evaluation of Z Program**, as external interviewees were slow to respond, I asked team members to develop a redistribution plan so that work on other components could advance while waiting for interviews to trickle in.

As part of initial planning, I commit to clients to report every two weeks on progress and to provide results in accessible formats. For example, since the **Evaluation of Program A** extended over a 14-month period, every quarter I produced colorful infographics of evaluation findings to date that could be shared with program representatives.

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4.4 Coordinates the work of other team members

Descriptors:

- Recognizes the strengths of each team member when assigning responsibilities.
- Delegates actions or reassigns tasks if required.
- Seeks additional or specialized expertise when necessary.
- Trains and mentors emerging evaluators.



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4.4 Coordinates the work of other team members

When managing evaluations, I coordinate and oversee team members' tasks. I meet regularly with team members to discuss the progress of the evaluation and their workload. Tasks may be reassigned to meet deadlines.

For the **Evaluation of Program A**, I distributed the interviews among team members based on the languages they could speak, what region they were in to mitigate scheduling challenges posed by key informants being spread across time zones, and their level of experience (i.e., senior team members conducted interviews with senior government officials). I provided several rounds of feedback (both on the document and in meetings) to a junior team member to whom I had assigned the data and document review.

As lead for the literature review for the **Evaluation of Program Y**, I mentored a new research associate on our agency's writing conventions, bibliographic software, academic databases we have access to, and approach to data collection.

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