

2019-2024

Canadian Evaluation Society Strategic Plan

ELEVATE • ENGAGE • ADVOCATE



Canadian
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While the strategic priorities reflect the core purpose of CES, we are also introducing three guiding principles embedded across these strategic priorities to guide *how* we work. These guiding principles are as follows:

› ***Diversity, Equity and Inclusiveness:***

We support an inclusive organization where a diversity of members thrives and evaluation practice grows in this spirit. This would be fostered through engagement, transparency and fairness. Embedding diversity within CES includes consideration of people's social identities, world views, ideas and ways of working, as well as institutional and enabling environments. See Appendix A for a more detailed definition of Diversity, Equity and Inclusiveness.

› ***Sustainability:*** We take a leader role in sustainability, building opportunities to align work in diverse sectors in support of sustainability, and incorporating increasingly sustainable practices as an organization. See Appendix B for a more detailed definition of Sustainability.

› ***Seamless Member Experience:***

We provide a seamless experience for members, including activities such as membership management and engagement, events, virtual collaboration, professional learning and communication through coordinated technical systems.

Introduction

The 2019-2024 Canadian Evaluation Society (CES) Strategic Plan is our roadmap to advance evaluation theory, knowledge and practice within Canada and abroad. Building on the success of our 2015-2018 Strategic Plan, over the next five years, we will be focusing on the following **strategic priorities:**

- 1 Elevate the professionalization of evaluation.
- 2 Engage, attract and retain members.
- 3 Advocate for evaluation among evaluation users.

These strategic priorities provide guideposts for all the parts of the organization to work together and thrive. We outline opportunities for alignment and shared contributions, especially among our Chapters, and identify the key areas where CES National can provide support. While the ways in which we address our priorities may evolve as we implement this plan, the priorities themselves are solidly grounded in ideas and insights from throughout the CES membership, organizational structures, affiliates and partners.

Overview of the Canadian Evaluation Society

CES is a national, non-profit association, positioning and building evaluation practice and theory. Incorporated in 1981, it has continually evolved to support the field of evaluation in Canada.

We currently have nearly 1,700 members, with 25 per cent holding the Credentialed Evaluator (CE) designation. Our membership is highly diverse, composed of self-employed, provincial and federal government, university, private business, student and NGO evaluators. Ninety-five per cent of CES members are located in Canada and 5 per cent are located internationally. Those in Canada maintain membership in one of our 12 regional Chapters, which provide local services and connections. In addition to our Chapters, we have a robust structure of committees, working groups and affiliated organizations, creating a strong sense of community among all evaluators. We also have a membership category for Fellows to recognize individuals who are championing evaluation, the profession and CES through their achievements and services.

Our Vision

Advancing excellence in evaluation across Canada and internationally.

Our Mission

Through our national operations and a network of Chapters, members and partners, CES:

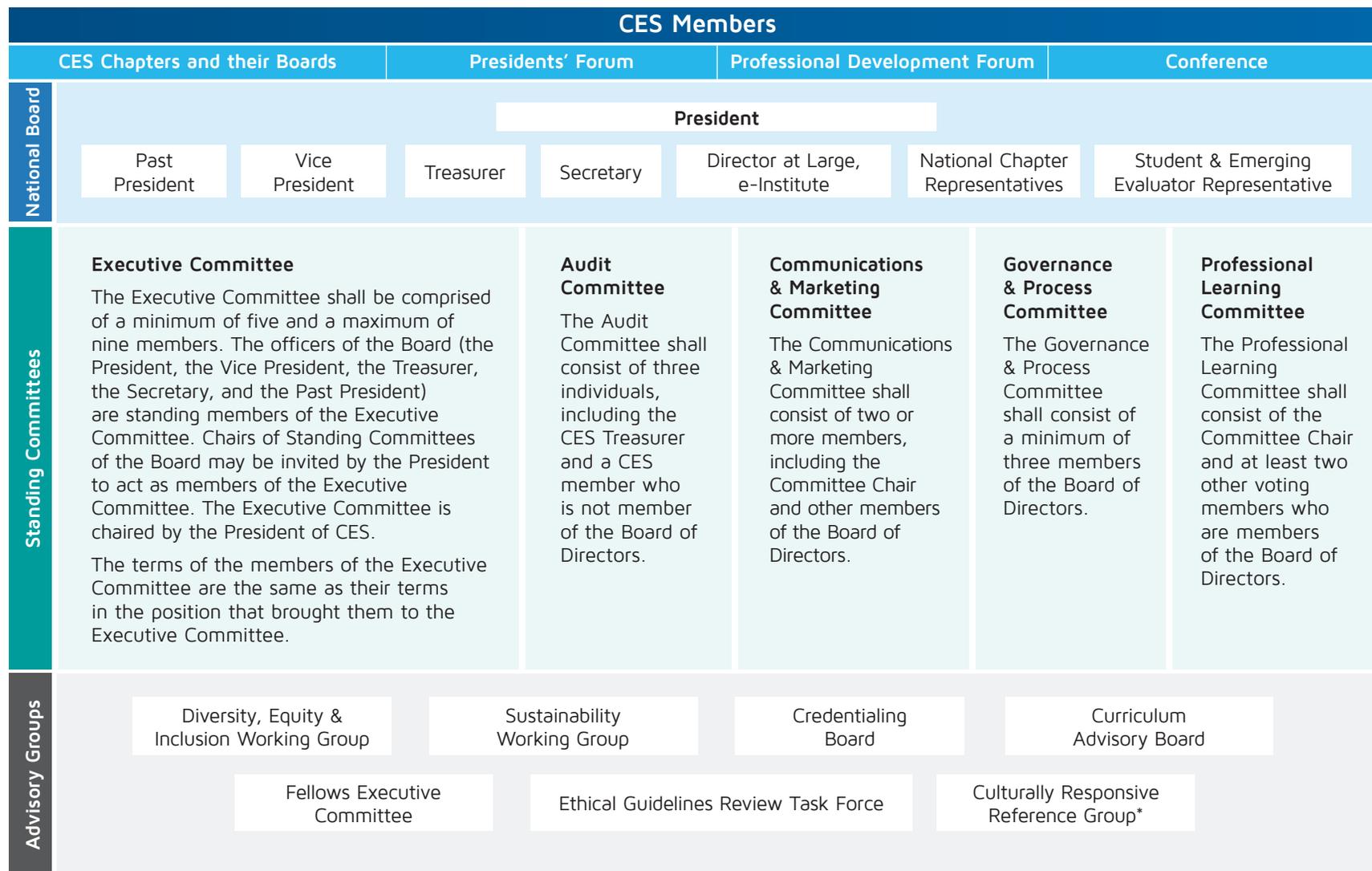
- › Promotes the development of evaluation theory and practice;
- › Leads the professionalization of evaluation;
- › Builds awareness of evaluation; and
- › Advocates for the use of quality evaluation.



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CES Organizational Structure



In addition to the above structure, CES is supported by the following contracted services: National Operations and Membership Manager, Secretariat, IT Support, Assistant Editor (*Canadian Journal of Program Evaluation*), and University of Toronto Press (*Canadian Journal of Program Evaluation*).

Board representation is provided at the Joint Committee on Standards for Educational Evaluation, the CUEE, the International Working Group and the Fellowship Selection Committee.

**From time to time, the CES e-Institute forms Course Development Reference Groups (CDRGs) when specialized expertise is needed in the development of an e-Institute course. The purpose of a CES e-Institute CDRG is to support the development and review of a specific e-Institute course. The CDRG is composed of up to six CES members and/or non-member experts who have topic-specific expertise, and it is chaired by the CES e-Institute Director. There are two pathways to membership: members can be invited by the CES e-Institute Director or they can self-nominate. All nominations are reviewed and appointed by the Professional Learning Committee.*

Environmental Scan

Evaluation as a profession has evolved dramatically since CES was founded almost 40 years ago. To capitalize on current opportunities and prepare for potential challenges as the field continues to advance, an environmental scan was conducted as part of the strategic planning process. See Appendix C for the questions used during the environmental scan.

This analysis included consultations with eminent evaluators and external organizations representing either professional evaluators—generally other Voluntary Organizations for Professional Evaluation (VOPEs)—or professional associations, as well as consideration of the most recent member survey and risk registry.

The following stakeholders were consulted:

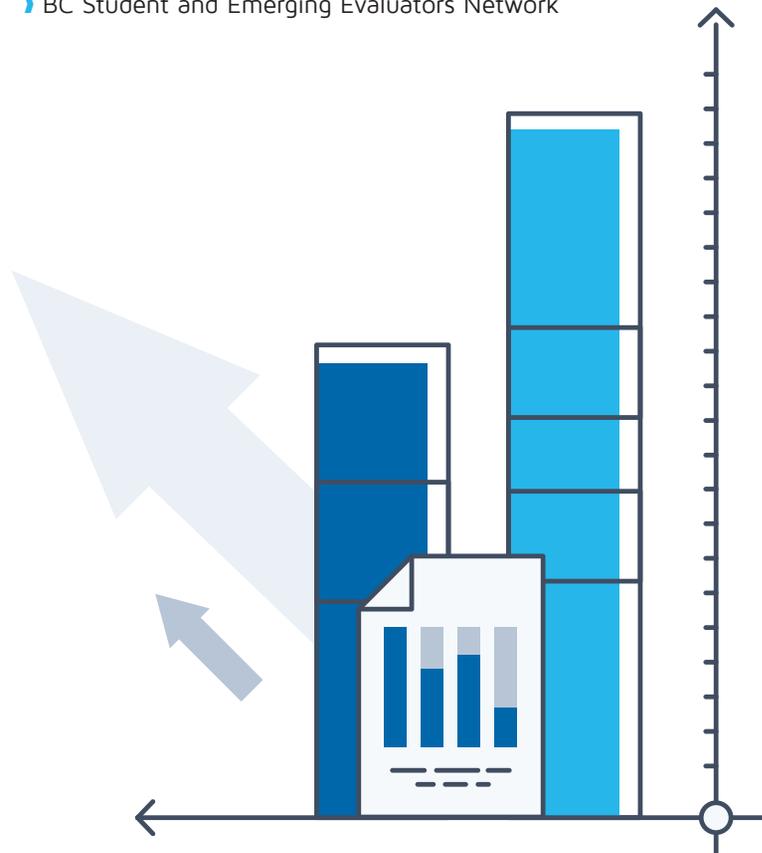
Environment & Influence

- › International Organization for Cooperation in Evaluation (IOCE)
- › Other VOPEs: American Evaluation Association
- › Other associations: Canadian Association of International Development Professionals; Performance and Planning Exchange
- › Robert Lahey (webinar)
- › Treasury Board Secretariat
- › Consortium of Universities for Evaluation Education (CUEE)
- › CES Educational Fund

CES Structures

- › CES Chapters (BC, ON, NCC, NL, NS, SK, MB, YK)
- › Standing Committee Chairs: Communications & Marketing, Professional Learning, Governance & Process
- › Credentialing Board
- › CES e-Institute

- › Curriculum Advisory Board
- › *Canadian Journal of Program Evaluation*
- › CES Fellows
- › 2019 Conference Organizing Committee
- › Diversity, Equity & Inclusion Working Group
- › Sustainability Working Group
- › Sponsorship Working Group
- › BC Student and Emerging Evaluators Network



Current Trends for the Evaluation Community

Professionalization

There is an increasing trend toward professionalization. This means that our professional development efforts, including the Professional Designation Program (PDP), are perceived by other organizations and individuals to have value. Professional and evaluation organizations also consider training and capacity building to be priorities, and we are well positioned in terms of both the delivery mechanisms (the CES e-Institute, webinars and Chapter-organized events) and the content, with a dedicated Curriculum Advisory Board and access to experienced evaluation practitioners and academics.

Demand for Evaluation

There is an interest in evidence-based decision making in many public and private sector organizations. We have an important role to play in advocating for evaluation to ensure that the framing, approaches and use of evaluation recognize the value that it can bring.

There are a number of areas where advocacy may serve to improve the understanding of what evaluation is and what it offers. These areas include the not-for-profit, municipal and private sectors, as well as with policy makers.

Evaluation commissioners are also looking for ways to identify competent evaluators. This may be an opportunity for us to promote the CES Competencies for Canadian Evaluation Practice and the CE designation to support these evaluation users.

Evolving Landscape

As the practice and context of evaluation evolve, emerging evaluators are bringing innovative ideas and different expectations. These shifts must be balanced with the needs of more established evaluators, as well as those commissioning evaluations.

Diversity, equity and inclusion (DEI) are introduced as guiding principles in this strategic plan. In addition, a DEI Working Group (DEIWG) is advising the Board of Directors and other parts of the organization on DEI issues in order to ensure that these values are reflected in the decision-making process. As such, we will be in a position to invite and facilitate conversations around developing evaluation that serves a diversity of perspectives and priorities.

Membership scanning indicated that current and prospective members also hold membership in other professional associations, often associated with their sector of focus. This creates a great potential for partnership with these associations to offer joint benefits to members, such as the five-year Cooperation Agreement signed between the National Capital Chapter (NCC) and the Performance and Planning Exchange (PPX). We also collaborate with a number of international organizations through our membership in the IOCE.

Despite these efforts, it is important that we develop more knowledge about the needs of prospective members and other possible Canadian associations where prospective partnerships would enable the expansion of our membership outreach, potentially including to non-evaluators.

Communication and Engagement

Communication using traditional methods is still important to our members, but there is a clear trend toward greater use of technology and social media. We currently offer a great deal of communication and content online, for instance, through the website, the e-news, the grey literature database and the open-access *Canadian Journal of Professional Evaluation*. Social media is also increasingly providing an opportunity to disseminate research and evaluation results more widely.

One trend from which we have already begun to benefit is increasing interest in meetings, conferences and symposiums that bring people together to share professional learning. We responded quickly and efficiently to the changes imposed due to COVID-19, and moved our activities, annual conference and professional development offerings to virtual platforms.

Risks

Our Board of Directors actively monitors and manages risk through a risk registry that covers strategic, operational, financial, people and governance issues, which is updated semi-annually. As of June 2020, some of the identified high risks and their mitigation strategies are as follows:

Risks	Mitigation Strategies
<ul style="list-style-type: none"> Diminishing membership and renewals due to internal and external risks (e.g., internal: dissatisfaction with benefits or service; external: COVID-19 effect, which could impact revenue from membership). 	<ul style="list-style-type: none"> Develop an IT strategy to update CES website and related online services to improve and maintain member experience; Monitor and update membership service standards; Work closely with Chapters to respond to member needs; Create and update a complaint policy regularly; Allow for flexibility in membership fees and CE renewals payment to accommodate external factors.
<ul style="list-style-type: none"> Unresolved operational differences between CES National and Chapters. 	<ul style="list-style-type: none"> Conduct ongoing Presidents' meetings; Identify opportunities to collaborate; Make sure profit-sharing formulas for CES professional development activities are clear to all and discussed regularly (e.g., the CES e-Institute, conferences, ESS, etc.).
<ul style="list-style-type: none"> Low conference revenues (deficits) or cancellation of the annual conference due to unforeseen external circumstances. 	<ul style="list-style-type: none"> Establish a review committee for conferences; Maintain unrestricted fund through lowering expenditure on the consecutive year to absorb the loss of conference income; Find new ways of engaging members; Evaluate and share learning from online and alternate events; Encourage smaller regional in-person events and support smaller Chapters to host smaller events.
<ul style="list-style-type: none"> Not adapting to changes or incorporating diversity in the evaluation community. 	<ul style="list-style-type: none"> Invest in member outreach activities; Review policies for connotation and bias; Diversity, Equity & Inclusion Working Group (DEIWG) to advise National Board on DEI-related issues; Review competencies regularly to make sure they respond to changes in the profession; Creating a New Practitioner membership category; Encourage efforts to support emerging evaluators; Make sure the Credentialing Board composition reflects DEI. Create a Student & Emerging Evaluator Representative position on the National Board; Sustainability Working Group to advise National Board on suitability-related issues.

Guiding Principles

The 2019–2024 CES Strategic Plan is driven by three guiding principles that emerged from the consultations that took place as part of the strategic planning process, as well as CES ongoing work:

Diversity, Equity and Inclusiveness:

We support an inclusive organization where a diversity of members thrives and evaluation practice grows in this spirit. This is achieved through engagement, transparency and fairness. Embedding diversity within CES includes consideration of people’s social identities, world views, ideas and ways of working, as well as institutional and enabling environments.

Sustainability:

We take a leader role in sustainability, building opportunities to align work in diverse sectors in support of sustainability, and incorporating increasingly sustainable practices as an organization.

Seamless Member Experience:

We provide a seamless service for members, including activities such as membership management and engagement, events, virtual collaboration, professional learning and communication through coordinated technical systems.

Strategic Priorities

Over the next five years, we will build on our assets and strengths as work with our partners and allies to advance our three strategic priorities:

1

Elevate the professionalization of evaluation.

2

Engage, attract and retain members.

3

Advocate for evaluation among evaluation users.

The next sections provide the foundation we are building on and the objectives for each priority.

1

Elevate the professionalization of evaluation.



Background

As the professional association for program evaluation in Canada, one of our key roles is to elevate the professionalization of evaluation practice. This means ensuring Canadian evaluators have opportunities to develop and improve their skills, knowledge and practical experience, as well as obtain the appropriate credentials to support their expertise.

To that end, we provide high-quality, relevant professional learning opportunities that are focused on the CES Competencies for Canadian Evaluation Practice and emerging areas of interest in the field of evaluation. These learning opportunities are offered through the CES e-Institute, courses delivered nationally and regionally through the CES Chapters, webinars, and the annual national conference, as well as the mentoring initiative and the *Canadian Journal of Professional Evaluation*. We also promote accessibility of our professional learning services through the CES Educational Fund's (CESEF's) programs of awards and scholarship.

Our professional learning infrastructure upholds our high standards. This is made possible through our Curriculum Advisory Board, course sanctioning and review mechanisms, the CUEE, as well as alignment of actors in professional learning with evaluation competency and ethics frameworks, including our own. Through our Chapters and external partners, we also monitor the needs for capacity development among Canadian practitioners in diverse settings.

In addition, through our Professional Designation Program (PDP), we offer the Credentialed Evaluator (CE) designation, which is designed to support professionalization efforts by defining, recognizing and promoting the practice of ethical, high-quality and competent evaluation in Canada. The CES PDP is becoming recognized as a marker of professionalization by employers and commissioners of evaluations, building on the increasing professional recognition of evaluators.

Externally, there is a strong community of Canadian researchers in evaluation, and a growth in university and college training, founded on competencies, that is supplying well-trained and committed evaluation professionals. To help guide this burgeoning field, we promote our guidelines for competencies, ethics and values. We also established an Ethics Task Force and Terms of Reference in 2018, and developed the document, "CES Guidance for Ethical Evaluation Practice." This is further supported by the CES Fellows role in stimulating critical reflection on the profession through the Fellows Strand at the annual national conference.



The objectives related to elevating the professionalization of evaluation are as follows:

- 1.1** *Broaden the range of CES professional development opportunities and evaluation knowledge that caters to the diverse needs of membership.*
- 1.2** *Increase uptake and maintenance of the CE designation by evaluators and by client-users.*
- 1.3** *Support research and critical reflection in the field of evaluation.*
- 1.4** *Promote and uphold CES standards, ethics and values.*
- 1.5** *Increase the capacity for sustainability-ready evaluation within the evaluation community.*

Expected Outcomes by 2024:

- 】 **Members have expanded professional opportunities, contributing to the improved professional practice of evaluation in Canada.**
- 】 **Evaluation in Canada is recognized by educators, trainees, members, employers and commissioners as a highly professional field that contributes to increased effectiveness of programs, policies and initiatives.**
- 】 **Knowledge about evaluation is advanced, contributing to improved theory and practice.**
- 】 **Members have the tools and resources required to interpret and apply CES guidance on competencies, ethics and sustainability-ready evaluation.**

2

Engage, attract and retain members.



Background

As an association, our members are the reason why we exist. We are proud of our strong membership base, with a committed core of individuals and opportunities for ongoing growth. To stay in touch with evolving needs, CES regularly communicates with members through a variety of channels, including the CES website, Chapter websites, email bulletins and social media, in addition to conducting a member survey every three years. We also ensure Chapter engagement in recruiting and supporting volunteers for Chapter and CES governance, committee and activity organization roles.

In terms of engagement, we offer members various opportunities to connect to the broader CES community of evaluators in their regions and across the country formally and informally. There are networking opportunities offered by all Chapters as well as our annual conference, which is a strong national moment of connection and is growing in size and now adapting access through virtual platforms. CES is currently exploring emerging opportunities for further online interaction to respond to current needs. Finally, we encourage members to provide input on our activities and priorities at any time.

The objectives related to membership are as follows:

- 2.1** *Foster the growth of a diverse membership.*
- 2.2** *Provide exceptional and valued member service that is responsive to diverse member needs and takes into consideration organizational sustainability.*
- 2.3** *Ensure meaningful engagement and connection with and among members through an integrated communication strategy.*



Expected Outcomes by 2024:

- › Membership grows and diversifies.
- › Members feel valued.
- › Members are active, engaged participants in CES.
- › CES is recognized as an organization that is responsive to member needs.

3

Advocate for evaluation among evaluation users.



Background

We are the professional voice of evaluation in Canada, supported by our robust PDP program and a credible CE designation. We undertake initiatives to raise awareness about the importance of quality evaluation locally, nationally and internationally. Our Chapters' and Fellows' networks and knowledge of opportunities on the demand side of evaluation enable us to remain informed about evolving needs and promote robust professional standards among the various evaluation users. CES also works in collaboration with Canadian and international partners to advocate for evaluation.

The objectives related to advocating evaluation among evaluation users are as follows:

- 3.1** *Promote the value of evaluation directly, in collaboration with Chapters, in Canada and worldwide.*
- 3.2** *Encourage enabling environments and institutional capacities for the demand side of evaluation among policy makers, commissioners of evaluations and employers.*
- 3.3** *Support the transformation of the practice through the implementation and promotion of evaluation-specific reconciliation activities.*
- 3.4** *Collaborate to advance sustainability-ready evaluation theory and practice.*



Expected Outcomes by 2024:

- » Evaluation is at the forefront of the minds of Canadian politicians and policy makers, and is considered a crucial resource that contributes to increased effectiveness of programs, policies, governance and management of public funds.

Toward the Future

As we move forward with the implementation of the 2019-2024 CES Strategic Plan, we recognize that it is a collective endeavour. We are relying on our hundreds of active volunteers, including those on the Board of Directors, committees, working groups, Chapters and more, to remain committed to our vision and continue contributing their time, knowledge and skills. We also rely on the funds and activities covered under existing budgets and will allocate financial resources as needed to carry out our objectives.

We are aware that as we move toward achieving our objectives and goals, our organizational structure may need to be responsive to the ongoing needs and changes that would affect CES operations. Upon the adoption of this strategic plan, an internal consultation process will begin to determine the the best ways of incorporating the guiding principles, taking into account the appropriate governance structure, accountability and reporting, and efficient communication.

Conclusion

The field of evaluation is growing and evolving, influenced by trends toward increased professionalization, information sharing and innovation, as well as heightened demand for competencies and accountability. CES is poised to build on these opportunities over the next five years by focusing on elevating our collective professionalism, engaging current and potential members, and advocating for use of evaluation among current and potential evaluation users.

We will work as a networked community, seeking out opportunities to provide support and alignment among CES National, Chapters and other parts of the organization to fulfill our vision and mission. With this collaborative approach, we will also engage a wide range of key stakeholders, ensuring input from as many perspectives as possible. Together, we will achieve our vision of excellence in evaluation across Canada and internationally.

Appendix A: Diversity, Equity and Inclusion

Evaluators play a crucial role in addressing systemic issues of diversity, equity and inclusion, as they are often in positions to influence the decisions of governments, service providers and other social organizations. Evaluators must work to dismantle systems and structures of oppression that produce social injustices and inequities in order to support equity for communities that have faced historical and ongoing marginalization.^{1,2}

Equity refers to the active removal of barriers and biases that limit the meaningful participation of all people and that perpetuate unequal distributions of power, resources and opportunities.

CES is committing to reflecting on how dynamics of power and privilege create systemic inequities, intentionally working to dismantle these systems, and finding pathways to provide opportunities for redistributions that redress historical and continued disparities.^{3,4,5}

Diversity captures the distinct life experiences, identities and knowledge of people and communities. In the Canadian context, factors such as ability, age, race, ethno-cultural background, Indigeneity, citizenship, language, socioeconomic status, gender, sexual orientation, religion and beliefs, among others, are examples of how diversity is categorized. Particular consideration is given to how these elements intersect and affect relations of power and privilege differently in people's lives and communities.

CES is committing to respecting and supporting a diversity of perspectives and life experiences, and promoting culturally-responsive evaluation, which values multiple knowledges and approaches contingent on context, and collaborative relationships with communities.

Inclusion supports and maintains a diversity of members, voices and perspectives by ensuring that all individuals feel that they belong, that they are valued and that they are comfortable to participate as their full selves.

CES is committing to creating a culture of inclusion through the active and intentional process of critically reflecting on biases, identities and relations of power to create spaces that are welcoming and supportive.

CES is also supported by its Diversity, Equity and Inclusion Working Group, through its efforts at active reconciliation, rooted in but not limited to the following resolutions, as presented by the Diversity Working Group and adopted by the board on May 4, 2016:

- *Resolved*, that the Diversity Working Group supports the CES in implementing consideration for reconciliation in its activities.

¹ Thomas, Veronica G., Anna Madison. (2010). "Integration of Social Justice Into the Teaching of Evaluation." *American Journal of Evaluation*. 31 (4), 570-583.

² Caldwell, Leon D., Katrina L. Bledsoe. (2018). "Can Social Justice Live in a House of Structural Racism? A Question for the Field of Evaluation." *American Journal of Evaluation*. 40 (10), 6-18.

³ Mertens, Donna M. (2007). "Transformative Considerations: Inclusion and Social Justice." *American Journal of Evaluation*. 28 (1), 86-90.

⁴ House, E. R. (1993). *Professional evaluation: Social impact and political consequences*. Newbury Park, CA: Sage Publications.

⁵ Dean-Coffey, J. (2018). "What's Race Got to Do With It? Equity and Philanthropic Evaluation Practice." *American Journal of Evaluation*. 39 (4), 527-542.

Appendix B: Sustainability

The CES Sustainability Working Group (SWG) is informed by the following sustainability concepts:

...development that is sustainable in terms of social progress, equity and inclusiveness, and economic development without undermining the natural resource base and ecosystems that we all depend on.

- Juha Uitto, personal correspondence, 2018

Indigenous peoples are caretakers of Mother Earth and realize and respect her gifts of water, air and fire. ... Everything is taken and used with the understanding that we take only what we need, and we must use great care and be aware of how we take and how much of it so that future generations will not be put in peril.

- "Honouring Earth," Assembly of First Nations. Retrieved September 5, 2018: <http://www.afn.ca/honoring-earth/>

The SWG describes sustainability-ready evaluation as the evaluation of coupled human and natural systems for equitable mutual benefit within and among these systems.

Additional guideposts within CES's broader context include:

- 1) The United Nations (UN) Sustainable Development Goal (SDG) progress on valuing the intrinsic rights of non-humans within equity-focused evaluation: The UN's 2030 Agenda for Sustainable Development led to new guidance on the Inclusive Systemic Evaluation for Gender equality, Environments and Marginalized voices (ISE4GEMs) that acknowledges the marginalized voices of flora and fauna.
- 2) *Canada's Federal Sustainable Development Act*: This Act informs the preparation of Canadian evaluators to generate and mobilize decision-relevant evidence on interconnected human and natural systems. Intergenerational equity and the unique role of Indigenous Canadians (UNDRIP, TRC, Active Reconciliation) is explicit in the Act, as is the role of results-based management.

The purpose of this Act is to provide the legal framework for developing and implementing a Federal Sustainable Development Strategy that will make decision making related to sustainable development more transparent and subject to accountability to Parliament, promotes coordinated action across the Government of Canada to advance sustainable development, and respects Canada's domestic and international obligations relating to sustainable development, with a view to improving the quality of life of Canadians.

In section 5, the Act specifies:

- (a) ... the **need for the Government of Canada to integrate** environmental, economic and social factors in the making of all of its decisions;
 - (b) the **principle of intergenerational equity**, which is the principle that it is important to meet the needs of the present generation without compromising the ability of future generations to meet their own needs;
 - (c) the **principle of openness and transparency**, which is the principle that the release of information should be encouraged to support accountability and public engagement;
 - (d) the **principle that it is important to involve Aboriginal peoples** because of their traditional knowledge and their unique understanding of, and connection to, Canada's lands and waters;
 - (e) the **principle of collaboration**, which is the principle that it is important for stakeholders to collaborate in the pursuit of common objectives; and
 - (f) the principle that **a results and delivery approach** — that allows for developing objectives, developing strategies for meeting those objectives, using indicators for reporting on progress towards meeting those objectives and establishing accountability — is key to meeting measurable targets.
- 3)** Cross-disciplinary progress to mainstream interspecies and intergenerational equity as well as social equity, within the discourse and conceptual framing of equity and ethics (e.g., Justice Brian Preston's "What's Equity Got to Do with the Environment?"):
The distribution of the benefits and burdens of developing the environment raises issues of equity. The notion of equity concerns evenness, fairness and justice. The members of the community of justice comprise people of the present generation, people of future generations and non-human nature, present and future. Extending equity to these members involves intragenerational equity, intergenerational equity and interspecies equity. These three principles of equity fix not only the process of decision making concerning development of the environment but also the results of decision making.
- 4)** Increasing recognition of colonization, land dispossession and cultural genocide as root causes of an extractive, rather than regenerative culture that drive degenerative design in finance, politics and environmental management.

⁶ Preston, Justice Brian J. (2018). "What's Equity got to do with the Environment?" *Australian Law Journal*. 92(4), 257.

Appendix C: Environmental Scan Questions

The following questions were used to guide the strategic planning consultation process:

- 1 What are the trends and emerging themes in the field of evaluation?
- 2 What are the best practices and risks for:
 - a. Professionalization [of evaluation]
 - b. Capacity building
 - c. Communication in support of the evaluation community
- 3 What should diversity in the evaluation community look like, and how can CES encourage and support the growth of such diversity?
- 4 What should be the top priorities for CES as a national organization?
 - a. Why are these meaningful?
- 5 What is the most meaningful role for CES?
- 6 What indicators would you like to see tracked?*

**Not enough data were collected in response to this question.*

