

CES Strategic Plan 2015-2018

EXECUTIVE SUMMARY

As the Canadian Evaluation Society completes its 2012-2015 programming cycle, the Board of Directors began a strategic planning process in November 2014 to map out an agenda for the next three years. A new set of CES priorities, organizational vision and mission were identified, tested and validated in the spring of 2015 through consultation with Members and Chapters across the country.

As a national professional society, the primacy of services and value to members is the foundation for the CES Strategic Plan 2015-2018 which seeks to build on past momentum while tapping into emerging opportunities, and expanding organizational capacity and profile.

The following strategic priorities will frame CES programs and services from 2015 to 2018, and are explained herein:

- 1. Increase the value of evaluation**
- 2. Engage, grow and diversify our membership**
- 3. Advance the professionalization of evaluation**

INTRODUCTION

Evaluation is the systematic assessment of the design, implementation or results of an initiative for the purposes of learning or decision-making. (CES, 2015)

Evaluation is on the upswing. Increased appetite for accountability and sustainability call for measured reflection and demonstration of results, opening up opportunities for evaluation theory and methods to inform choices. Yet the field is complex, understated and often not well understood.

CES is poised to continue forward, building on more than 30 years of strengths to capitalize on opportunities and trends in evaluation, professionalization and advocacy across Canada and internationally. A summary of the strengths-weaknesses-opportunities-threats analysis highlights CES' many internal assets to build on and a few gaps to address (refer to Annex A for context and SWOT summary). The experience and dedication of CES' Members, Chapters and Board combined with its inclusive national organizational structure, well-established reputation make it a credible and reliable leader in the field of evaluation. CES' strategic advantages will be put to increasing the

take-up of evaluation as a profession, growing partnerships and new opportunities to increase reach and impact, while growing the organization. A balance is required to manage organizational capacity constraints and limits of competition, all the while keeping a close eye on strengthening membership value proposition.

The new CES Strategic Plan 2015-2018 is designed to be solid enough to frame programming for the next several years, while allowing some flexibility to consider alignment with new evaluation agendas at the international level. Building on progress of the past, the new plan for 2015-2018 is designed to focus more on strategic priorities rather than ongoing operational activities. A corresponding Action Plan 2015-2018 (forthcoming) will put into motion a renewed CES Vision and Mission:

CES Vision: Advancing excellence in evaluation across Canada and internationally.

CES Mission: Through our national operations and a network of chapters, members, and partners, the 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.

CES STRATEGIC PRIORITIES 2015-2018

The following strategic priorities will frame CES programs and services from 2015 to 2018:

- 1. Increase the value of evaluation**
- 2. Engage, grow and diversify our membership**
- 3. Advance the professionalization of evaluation**



Each priority is grounded in CES Values (see Annex B) and incorporates the following cross-cutting themes:

- **Closer collaboration with Chapters** from planning, coordinating and delivering professional development opportunities, better engaging and acknowledging volunteer members, to helping build organizational sustainability in the smaller chapters;
- **Partnerships** internally and externally to pursue / optimize CES resources, whether it be joint professional development offerings, or multiple voices in an advocacy strategy;
- **Enhanced use of technology** whether for online training or other mechanisms to engage members, IT enhancement and increased use of social media; and,
- **Differentiating** the overlap and inter-connections between the strategic priorities as they have multiple functions.

A corresponding CES Action Plan 2015-2018 guides CES Committees and Working Groups in implementing and sequencing initiatives in support of each strategic priority, including budgeting and performance indicators to monitor success, targets and the key activities that must take place to get there.

Assumptions

As a volunteer-based Professional Association, it is important to keep in mind that these strategic priorities have been planned as part of the marginal additional effort which the CES is able to take-

on (i.e., an additional 10-20% of effort) successfully within existing capacity, over and above the ongoing delivery, services and operations of the organization. CES ability to achieve its plans will rely on adequate and functional resources including: CES Secretariat administrative and financial services; volunteer contribution of Board, Committee, and Working Group Members; support of the part-time Executive Director; and appropriate financial resources.

Priority #1: Increase the value of evaluation in Canada

A core mandate of CES is increasing understanding of evaluation, its role and contribution to society. Evaluation brings evidence to stakeholders and decision-makers to facilitate social betterment. This is achieved through the systematic collection and interpretation of data for the purposes of assessing the relevance, effectiveness, and efficiency of programs to answer the questions of what works, for whom, and why. There is an ongoing need to raise awareness of CES' evaluation competencies and standards, knowledge and ethics. CES also needs to engage in and influence important conversations about enhancing evaluation practice and use in Canada and internationally.

The outcomes CES seeks to achieve by 2018 are:

- i. raised awareness of evaluation, its purpose and value among target audiences
- ii. raised awareness of CES standards, competencies, and the benefits of accreditation among target audiences
- iii. engagement in important conversations about evaluation in Canada and internationally
- iv. expanded CES' reach and position as the Canadian advocate for evaluation

Priority #2: Engage, grow and diversify CES membership

Currently, the CES offers a range of professional development offerings, networking opportunities and benefits to its membership. However, developing and introducing new initiatives is required to both encourage existing members to engage and to renew, as well as to draw in new members that are more diverse than our current membership.

The outcomes we wish to achieve by 2018 are;

- i. engaged members and Chapters in the value proposition conversation
- ii. increased retention of our existing members
- iii. attracted new members
- iv. increased diversity of membership profile to better reflect the range of the evaluation profession

Priority #3: Advance the professionalization of evaluation

The CES has identified evaluation standards, competencies and ethics to guide the practice of evaluation in Canada, and which form the foundation of the Professional Designations Program. Professional development, networking and leveraging partnerships also support the professionalism of evaluation.

The outcomes we wish to achieve by 2018 are:

- i. improved professional practice of evaluation in Canada
- ii. increased self-identification of CES members as professional evaluators
- iii. broadened range and reach of CES professional development opportunities
- iv. increased take-up of CE credentials by evaluators and by client-users

2015-2018 ACTION PLAN

This CES Strategic Plan 2015-2018 will be operationalized according to an action plan which will be developed in September 2015, ensuring appropriate sequencing, resourcing and inter-connection of activities. Implementation will be overseen by the Board of Directors and part-time Executive Director, based on work by voluntary Committees and Working Groups as well as contracted services of the CES Secretariat, Executive Director and other professionals as required.

Monitoring and evaluation will be undertaken at regular intervals (quarterly) and will include activity-based progress as well as reporting on progress towards targets as appropriate, with adjustments made as needed. Annual reporting to the CES membership will take place at the Annual General Meeting.

ANNEX A: CONTEXT – ENVIRONMENTAL SCAN & SWOT ANALYSIS

In November 2014, the CES Board undertook an environmental scan to identify the following Strengths, Weaknesses, Opportunities and Threats (SWOT) as a guide for forward planning:

Strengths: CES' Internal Strengths: What does CES have going for it? What is CES good at? What are CES' assets?

- PEOPLE
 - Expertise of Board and Members: knowledge, dedication, expertise and experience of Board members; expertise of members
 - Strong volunteer commitment and member engagement
- ORGANIZATIONAL STRUCTURE AND REACH
 - National-chapter structure; wide reach through chapters and members (circles of influence); geographic representation, diversity and experience among CES members
 - New Executive Director provides additional capacity and signal of strength
 - Secretariat offers continuity and administrative efficiency
 - Some financial latitude to invest in initiatives
- REPUTATION & CREDIBILITY
 - Well-established, respected organization; non-partisan
 - Leadership capacity: well positioned nationally and internationally
 - Improved Communications: better communication tools; website
- STRATEGIC ADVANTAGE
 - Unique Offerings: Credentialed Evaluator program

Weaknesses: CES' Internal Weaknesses: What are CES' limitations or weaknesses? What CES characteristics or factors could prevent the organization from being successful?

- CAPACITY IS STRETCHED
 - Heavy reliance on good-will of volunteers; time, expertise, fit / organizational knowledge, continuity; internal capacity; volunteer fatigue / burn out; no time to be a learning organization, need time to reflect
 - Lack of permanent human resources limits organizational capacity and potential, makes progress on initiatives slow and sometimes uncertain
- ORGANIZATIONAL GAPS & SUSTAINABILITY

- Low organizational profile / visibility: room for greater national visibility as an organization; not being seen as the go-to place about evaluation; lack of access to decision makers, leaders
- Organizational Processes Need Improving: weak, unclear processes (re-inventing the wheel); unstructured communication
- Some Chapters Are at Risk: infrastructure support for chapters; sustainability of some chapters (structures)
- CLARIFY MEMBERSHIP VALUE PROPOSITION
 - Lack of shared definition of evaluation to unite membership; unclear value proposition; some services / offering not relevant / interesting to members; poorly defined and pitched CE program
 - Engagement of Members Stagnant or Declining: small flat or declining membership – not really growing; renewals difficult
- INCREASE AND DIVERSIFY MEMBERSHIP & CLIENTS
 - Society needs a demographic shift to better represent diversity; need to include the North
 - Reliance on government agencies for evaluation use (limited control over direction)
 - Incomplete historical data profile on members and separate SQEP data makes analysis challenging (new system will be an improvement).

Opportunities: CES' External Opportunities: What does CES have going for it? Opportunities, in the SWOT context, are factors external to the organization which could be used to help CES achieve its mission.

- EVALUATION ON THE UP-SWING
 - Strong Support for Evaluation Internationally and in International Development: UN interest; international climate in favour of evaluation; evaluation partners and other international collaborations
 - Enhanced Use of Evaluation: CES as content / knowledge broker; priority on effectiveness and efficiency in political discourse; increasing use of "evaluations" by non-profits and corporations
 - Stronger Voice for Evaluation in Canada: to become recognized nationally and internationally as the voice for evaluation in Canada
- INCREASE TAKE-UP OF PROFESSIONALIZATION
 - Continued Professionalization of CES: to become viewed as the vehicle that integrates / inculcates professionalization of evaluation practice into public & civil service
 - Possible collaboration with other organizations (e.g. TBS Center of Excellence on Evaluation)
- BUILD ON PARTNERSHIPS AND ALLIANCES

- Enhance Training through Partnerships : universities / formal training in evaluation and being seen as broker
- Opportunity to learn from other not-for-profit associations also having to adapt, including those serving professional members
- GROW & DIVERSIFY MEMBERSHIP
 - Define and market “evaluation”; play to our “Canadianism” to members, mandate content (CBC versus CNN model)
 - To become the association that is the home to those practicing in multiple settings using diverse methods
- TAP INTO TECHNOLOGY
 - Enhanced Use of Social Media and Technology: social media use (LinkedIn, etc.)
 - Expand new web-based training platform.

Threats: CES’ External Threats - What contingencies CES may have to deal with? Threats in the SWOT context are external factors which have the potential to reduce CES’ ability to achieve its mission. Threats tend to be more obvious (or at least we often focus on them more), and it’s important to separate the “real” existing or potential threats from those we sometimes “manufacture” when we are immersed in the situation.

- EVALUATION IS UNDERVALUED AND NOT UNDERSTOOD
 - Lack of knowledge about evaluation among decision makers/users; limited scope of evaluation; low receptivity to evaluation because work it entails after to change orgs / clients in times of austerity; governments not encouraging / supporting CES membership and CEs
- COMPETITION FOR MEMBERS AND SERVICES
 - Competition from other professional organizations for members and sponsorship, especially with increasing technical on line – capacity
 - Other organizations offering training in evaluation / research methods for evaluation
 - Preponderance of AEA and easy access to it; value-for-money challenges, cost of conferences, dues, services
- CHALLENGES WITH DATA, METHODS & TOOLS
 - Integrity of Evaluations Being Compromised: increased issues covered by evaluation; census long form impacting data gathering; thirst for simple solutions to complex problems
 - Increased Specialization of Evaluation Field: specialization in fields / substantive of evaluation; increasing member segmentation / specialization
 - Anti-spam Legislation Making Membership Renewal More Challenging: anti-spam – legislation challenges ability to reach members / lapsed number

ANNEX B. CES VALUES and MANDATE

Values

Ethical behavior on the part of members and the Society is recognized as essential for the profession as documented in the CES Guidelines for Ethical Conduct. The following values, which are presented in behavioral terms, represent the foundation for the decisions and actions of CES and its members.

Inclusiveness. Members value the diversity inherent in the communities in which they work and strive to ensure their methods are appropriate to the culture and context of these communities. As an organization, CES reaches out to ensure the diversity of the Canadian population is reflected in its membership.

Social Commitment. Members participate on a voluntary basis and choose to give freely of their time and knowledge as a positive and essential expression of social commitment to evaluation and societal benefits from evaluation.

Accountability. Members accept responsibility for her/his actions as they relate to evaluation practice and activities conducted on behalf of CES.

Transparency. Members openly disclose values, purposes, expectations, actions and conclusions while providing complete and honest information.

Wisdom. Members respect the ability to make good judgments based on what is learned from experience

Mandate

The work of the CES may be carried on throughout Canada and elsewhere and includes the following objectives:¹

- To provide a forum through which program managers, administrators, policy makers, consultants, and university professors can discuss the theory and practice of evaluation in Canadian society;
- To promote the practice of high quality evaluation in public and private programs throughout the country;
- To support the development of theories, standards and practices of evaluation;

¹ Articles of Incorporation October 30, 1981

- To promote training programs in planning the design, strategy, methods analysis and application of results for all types of evaluation;
- To provide a forum of exchange on policies, practices, applications and sources of funding for evaluation.