

ANNUAL REPORT

2019



JANUARY 2020

**WASHINGTON EVALUATORS
2019 BOARD OF DIRECTORS**

www.washingtonevaluators.org



**WASHINGTON
EVALUATORS**

Dear Washington Evaluators Members:

On behalf of the 2019 Washington Evaluators (WE) Board of Directors, I would like to thank you all for your continued engagement as members, and your energy in supporting our mission to enhance our local evaluation community.

Before I continue my last message as President, I would like to thank the Board with whom I had the pleasure of serving alongside this year, including: President-Elect, Patricia Moore Shaffer; Treasurer, Beeta Tahmassebi; Secretary, Kevin Jones; Program Chair, Melissa Chiu; Membership Chair, Natalie Donahue; New Professional and Student Task Force Chair, Val Caracelli; Scholarship Task Force Chair, Tamarah Moss; Evaluators Without Borders Coordinator, Emily Eisenhauer; and, Mentor Minutes Coordinator, Emily Bango.

As I entered this year as WE President, I sought to promote two themes: (i) evaluation as community, and (ii) evaluators in the community. Throughout the year, the Board was interested in not only ensuring that members could learn from fellow evaluators, but that our members could meet on a more personal and engaged level.

This year, we truly saw the growth of our community, experiencing unparalleled growth with a net increase of 119 dues-paying members. This was the first time since WE began tracking dues-paying membership, that we reached over 100 new members in one year.

Throughout the year, we held our usual professional development events and social gatherings, continuing what we have done well in the past. However, we also organized museum visits, field trips, and book club style events that focused on issues of equity and inclusion, calling on evaluators to think critically (and evaluatively) on how their skills could be applied to question and confront today's difficult and pressing problems. We also officially launched our pro bono evaluation support program, Evaluation Without Borders—stemming from our successful initiative during the 2017 AEA conference—which provided a space for members to offer hands-on support to advance the social justice missions of their pro bono clients, educate others about our discipline, and learn more about the important work done by non-profits and community-based organizations.

These are just a few of the achievements we saw in 2019, and I welcome you to review more of these successes, as well as areas for improvement, in our Annual Report.

As President, I hope that our activities helped you to more meaningfully engage with your fellow evaluators, but that they also spurred you to question how, as evaluators, we should think about how we can contribute to a more equitable and democratic society.

Warm regards,

Giovanni P. Dazzo

Activity Report

Membership

This year, the Board sought to increase and diversify membership. Based on past growth figures, we set a modest target of 12%, with the aim of increasing membership from 279 (as of January 1) to 315. As membership decreased into February and March

Washington Evaluators Membership

In 2019, WE membership increased by 119 members (+43%).



2019, this seemed like an aspirational target. However, due to increased programming and continued outreach, we saw increases across all membership categories. Increases were especially present in organizational membership bundles (from 9 to 44 members associated with an organizational sponsor) and student membership (from 3 to 27). We also met our target of welcoming more government evaluators into our community (from 47 to 65 government evaluators). As illustrated in the figure above, WE experienced a 43% increase in membership—a net increase of 119 members (as of December 31). At our peak, we reached 400 dues-paying members earlier in December.

Areas for improvement: We continue to experience some setbacks with membership retention, as members may let their membership lapse. When members let their membership lapse for several months and then rejoin, they are counted as “new members” within our system. Next year, we may provide members with the option to automatically renew membership through recurring payments. Additionally, a membership survey was developed this year and we hope to distribute it in early 2020 to learn more about members’ interests.

Programs

As a way to increase membership, but to also demonstrate the value of dues-paying membership, WE continued to hold members-only events. WE distributed invitations to all events to members and non-members, regardless of whether or not the event was open to non-members. As in years past, the Program Chair distributed invitations to members-only events as a way to encourage non-members to join. Many small events (15 or 25) were open only to members, or members with one guest. One guest was often allowed as a way for members to introduce others to WE. Attendance for seminars and webinars was limited for

non-members, in order to be accessible to low-income non-members, while encouraging non-members to join WE. Holiday party pricing was also \$10 lower for members than for non-members. As a result of this strategy, it appears that 83 people joined as new members or rejoined after a long lapse, as a direct result of members-only events. This was measured by people joining WE within a few days before registering for an event.

In total, WE held 30 events this year. The Program Committee organized a variety of events, with the aim of creating a sense of community among members. This included two *sine qua non* (neighborhood) dinners; two field trips; four Deep Dive (book club style) events; six seminars; fourteen networking events—including a meet-and-greet with the 2019 AEA President (Tessie Catsambas), events for independent consultants, a summer party, happy hours, and seven activity-based events that ranged from day-time hikes to museum visits. Our field trip series also sought to encourage our other theme this year—"evaluators in the community"—by providing members with the opportunity to learn from and interact with local organizations seeking to alleviate homelessness and improve pedestrian safety. Throughout the year, members provided positive feedback on the diversity of events.

"Wonderful opportunity to reconnect with colleagues in an informal setting out in our city. I really enjoyed the presentation. I've wanted to learn more about the housing issue in DC for a long time. Great idea! Great job pulling it together."
– **Member feedback after Pathways to Housing field trip**

Also in line with one of our themes for this year—"evaluation as community"—we sought to provide opportunities so members could interact with those outside the Washington, DC area, in an effort to expand our community. To do so, we provided members from other AEA affiliates to join our webinars. This led to reciprocal benefits, as other affiliates allowed WE members to join their members-only webinars. We sponsored two webinars where WE members could learn from evaluators in Africa, to promote transnational learning. Our last happy hour of the year—co-hosted with other Eastern affiliates at the AEA conference in Minneapolis—provided networking opportunities beyond attending conference sessions and TIG business meetings.

In addition to events, we also saw the official launch of our Evaluation Without Borders (EWB) program. EWB began as a WE-sponsored initiative for the 2017 AEA conference, where we invited local and out-of-town evaluators to provide pro bono evaluation services to local organizations. In 2019, we turned this into a program for WE members, where nearly 30 experienced and emerging evaluators were organized across several pro bono teams, offering in-person and virtual pro bono support to nine organizations. This was truly a 'without borders' experience, with organizations based not only in DC, but other states (e.g., Mississippi, Texas) and as far as the Democratic Republic of the Congo.

Our Mentor Minutes (MM) program, in its third year, saw an increase of mentor-mentee matches, reaching nearly two dozen mentees. Our new MM Coordinator was able to build the mentor roster, improve response times and matching times, and solicit feedback to understand how we can further promote and improve this membership perk.

Areas for improvement: This year, we continued to observe heavy rates of attrition at events. From registered attendees to actual attendance, drop-off rates ranged from as low as 20% to as high as 60%. While we have provided a way for members to cancel their registration on the WE website, the Board may need to do a better job of marketing this capability to attendees. While personal and professional emergencies arise, attrition has negative implications for event planning. If we are not able to consistently know how many registrants will attend events, it limits our ability to responsibly justify financial perks that we would like to provide to members (e.g., events where dinner or ticket fees are included).

Communications

In 2019, we marked another year of robust communications for the evaluation community. This should be seen as an exceptional achievement considering that we did so without a Communications Chair. President-Elect, Patricia Moore Shaffer, with the help of several committee members, continued to increase our presence on various social media platforms (LinkedIn, Twitter) and push out material for members and non-members every day. We saw an increase in Twitter followers, growing from approximately 1,600 to just over 2,000.

For members, we continued the curation of our Weekly Digest series, advertising events (sponsored by WE and other entities), publications, and professional opportunities. We also posted employment and consulting opportunities on our members-only WEval Forum.

Areas for improvement: The WEval Forum continues to provide a useful space to communicate with members. However, there is an opportunity for members to use this space to post discussion threads as a way to engage fellow members on important topics. Another area for improvement, of course, includes the appointment of a Communications Chair who is able to continue the excellent work that has been done over the last several years.

Organizational Governance / Administration

We also sought to improve the way we do business this year. We set out a number of governance-related objectives to ensure that we improve the sustainability of our organizational infrastructure. While these processes may not make headlines, we sought to improve this infrastructure as a way of ensuring that we are best placed to meet members' expectations, as our professional association can only be sustained if new members join and current members continue to renew.

To do so, we secured a ‘doing business’ address, allowing us to maintain a professional presence when registering for services (e.g., TechSoup). Our paid TechSoup account provided us with nonprofit discounts, which we used to procure Zoom—improving the look and feel of our members-only virtual meetings / webinars. To improve direct communication, we created dedicated email accounts for each Board member through the procurement of a Google Nonprofit account. Previously, all email communications routed to one address. Lastly, we sought to maintain the financial sustainability of our association by opening a new bank account, including a Money Market account that will earn interest throughout the year.

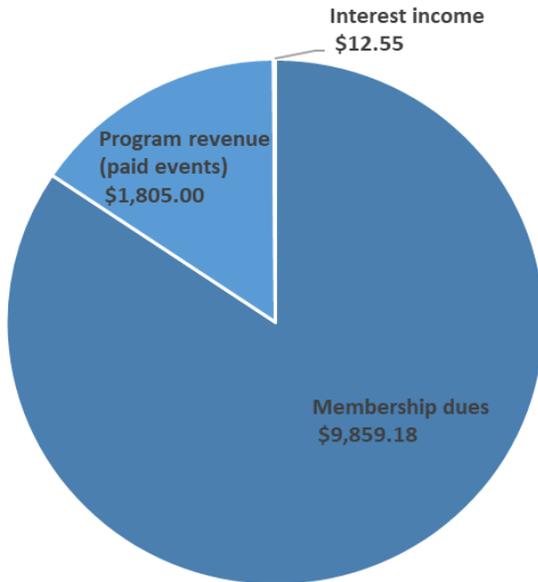
Lastly, we held a vote to amend our bylaws. Members overwhelmingly voted in favor of two ballot measures. The first requires that candidates for President-Elect have at least nine months of service on the Board (as an elected or appointed member), to demonstrate that they understand roles and responsibilities before assuming a three-year commitment for service. This amendment is similar to AEA’s guidelines for President-Elect, but also allows us to create a standard leadership pipeline and expectation for sustained service. Additionally, members approved the proposal of a new appointed Board position: Community Engagement Chair. This individual will manage several initiatives that were previously housed as special task forces / committees and managed by the President, including: New Professional and Student Task Force, Scholarship Task Force, Evaluation Without Borders, and Mentor Minutes. We hope that this new committee will provide the necessary structure to maintain these initiatives, while continuing their growth and adding value for members.

Areas for improvement: With the Money Market account, there is the possibility of using earned interest to contribute to scholarships for new professionals and students. Additionally, while we hope that members felt they received sufficient value with our consistent access to communications and 30 planned events this year, there is the possibility of improving how we demonstrate value. While the Board approves a budget each year, the creation of a spend plan could ensure that we are spending down resources while maintaining financial stability.

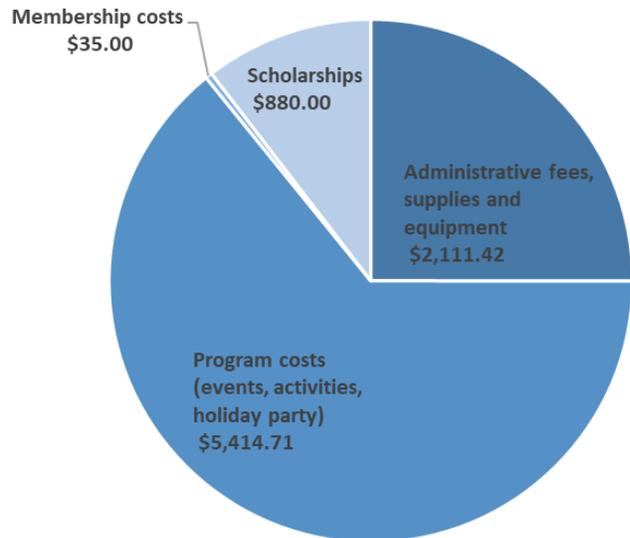
Financial Report

For the most part, WE generates revenue through membership dues, which are then used to pay for activities (e.g., dinners, holiday party), scholarships for students and emerging evaluators, administrative fees (e.g., nonprofit registration, 'doing business' address), and operational costs for items such as telecommunications (e.g., webinar platform).

Revenue



Expenses



Total Revenue: \$11,676.73

Total Expenses: \$8,441.13

Assets

As of January 1, 2020, WE held \$20,827.01 in assets. While the Board increased expenses this year—through increased program spending, a larger holiday party, and additional costs to improve governance and operations—continued growth in dues-paying membership still led to a 21.65% increase in assets.

Growth in assets places the association in good financial standing for the upcoming year. This allows the Board to continue to find ways to generate value for dues-paying members, ranging from additional scholarships for emerging evaluators to more events where WE covers dinner or admission fees for members.

2019
Asset
Growth
Rate:
+21.65%