



DRAFT
2021-2024
STRATEGIC PLAN



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Washington Evaluators Purpose Statement

The purpose of Washington Evaluators is to: (a) Promote scientific and educational purposes, as those terms are used in Section 501(c) of the Internal Revenue Code, in connection with the science and practice of evaluation in both the public and private sectors of society; and (b) Provide a regional, interdisciplinary forum for professional development, networking, and exchange of practical, methodological and theoretical knowledge in the field of evaluation.

August 25, 2021

Dear Fellow Evaluators –

As we are approaching the end of 2021, I am pleased to report that our Washington Evaluators community is as vibrant and engaged as ever before. With the COVID pandemic driving so much of our programming and networking online, we have become a community of choice for evaluators from the DC area and beyond who are searching for a place to learn, to exchange ideas, to grapple with some of the challenges of our time and our profession, and to make friendships and build professional relationships. The past year has seen a marked increase in membership, programming, and community engagement, and we could not be more pleased.

We embarked upon the strategic planning process with the goal of embedding our anti-racism commitments into all of our goals and efforts. To achieve this intention, we used a multi-pronged approach. Knowing what we thought would be needed (as a board) but also wanting to really hear from our membership. To this end, we hired an external consulting group, Paragon Education Consulting, to engage our members, solicit their feedback, and offer recommendations to guide our strategic plan. We also arranged for a series of Presidential dinners, designed to promote deep dives into our various services/offerings, and ask participants for ideas and feedback on how we could do more, do better, and be more inclusive in our approaches to everything from our board membership to our communications efforts.

While our Board has been hard at work on this plan for months, we did not wait for the plan to begin building our commitments into our offerings. 2021 has been a year dedicated to increasing access to WE programming and to listening to our members' needs. While we will always strive to do better, we are very proud of all that has been accomplished during this time.

This strategic plan has been developed to serve as a guide for Washington Evaluators for the remainder of this year and in coming years, as we strive to focus on building a more inclusive and equitable evaluation community in the Washington, DC area (and even beyond). Just as we have built on the incredible work done by those who came before us, we hope that this plan will serve as a launching pad for future leaders of Washington Evaluators and the evaluation community at large.

Regards,

Beeta Tahmassebi
2021 President
Washington Evaluators

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Introduction

Founded in 1984, Washington Evaluators is one of the oldest Voluntary Organizations for Professional Evaluation (VOPE) in the United States. Washington Evaluators supports the growth of the evaluation community and profession by promoting individual development of evaluation expertise, knowledge sharing, and collaboration. Washington Evaluators serves members by facilitating professional development events, networking, social interactions, as well as publication of upcoming evaluation events and opportunities in the region. Washington Evaluators' members come from a diverse mix of federal, state, and local government agencies, universities and educational settings, corporate businesses and independent consulting firms, and nonprofit associations.

At the end of 2020, Washington Evaluators had 372 members dispersed across DC, Virginia, and Maryland. In addition, Washington Evaluators members also resided in 18 other states and 5 other countries. In 2020, the organization sponsored more than 29 events, including 13 professional development seminars, five social and networking events, and 11 Board meetings.

In response to calls for social justice and antiracism, WE formed an antiracism task force in 2020, which led to the development of the [Embodiment of Antiracism Principles and Practices in Evaluation statement](#) and a proposal to integrate an antiracist perspective into WE's 2021 strategic plan. WE contracted Paragon Education Consulting to facilitate meetings in January 2021 with regional evaluators to apply antiracism principles to envisioning how Washington Evaluators can best fulfill its purpose: to provide a regional, interdisciplinary forum for professional development, networking, and exchange of practical, methodological and theoretical knowledge in the field of evaluation. These meetings, held in January 2021, kicked off a series of informal discussions with the evaluator community that directly informed the development of this strategic plan of the 2021 Strategic Plan.

Antiracism, along with diversity, equity, and inclusion, are key concepts used to frame the Strategic Plan. These concepts, collectively referred to in this plan as DEIA, are defined below to clarify the intent and direction of Washington Evaluators' plans.

Diversity: Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. It is all-inclusive and recognizes everyone and every group as part of the diversity that should be valued ([Racial Equity Tools](#)).

Equity: The condition of fair and just opportunities for all people to participate and thrive in society regardless of individual or group identity or difference. Striving to achieve equity includes mitigating historical disadvantage and existing structural inequalities ([American Evaluation Association](#)).

Inclusion: Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy making in a way that shares power ([Racial Equity Tools](#)).

Antiracism: Active process of identifying and eliminating racism by changing systems, organizational structures, policies and practices and attitudes, so that power is redistributed and shared equitably ([Washington Evaluators](#)).

2021-2024 Cross-cutting Principle

Ensure WE operates in alignment with our commitments to antiracism, integrating diversity, equity, and inclusion (DEIA) into all elements of our work.

The continued success of Washington Evaluators requires that WE’s membership, leadership and other volunteers, policies, and procedures represent and reflect the community it serves. To achieve this, it is imperative that WE proactively dismantles and redresses structural inequities that have historically disadvantaged people based on race/ethnicity, gender identity, sexual orientation, and disability status, as well as other characteristics such as career stage, level of education, and/or country of origin. Washington Evaluators strives to create a sense of belonging and inclusion for the diverse members of the full WE community and to ensure that our programming provides the necessary resources and support to collectively work toward systemic change.

The goals and objectives throughout this strategic plan provide evidence of WE’s commitment to an intentional, integrated approach to embodying antiracism and DEI. This guiding principle provides further, overarching guidance to ensure coordination across all aspects of WE. The following broad strategies shall be implemented across all WE’s goals and sub-objectives:

- Establish a clear identity of who WE is as an organization and whom we serve (range of members and needs). Then move to accomplish the goals and sub-objectives.
- Evaluate and assess language, content, and access related to WE communications, programming, and community engagement. Use inclusive and antiracist language in all communications and documentation.
- Sponsor accessible programming and content that resonate with the full range of our membership.
- Nurture community engagement that is representative and mutually beneficial.
- Promote, uplift, and learn from the experts who are doing the work on a daily basis.

2021-2024 Strategic Goals and Objectives

Washington Evaluators helps develop evaluators professionally and promotes a collaborative evaluation community through a variety of activities. In order to achieve the mission of Washington Evaluators, we have three key strategic goals and one cross-cutting objective. Collectively, these represent core components of the Washington Evaluators mission, and each goal suggests specific potential contributions to the evaluation community in the Washington, DC region that form the basis for objectives (►) described below.

Strategic Goal #1:

Increase key audience (i.e., emerging, new & experienced evaluators, university ambassadors, and nonprofits) engagement and sense of belonging through outstanding diverse, equitable, and inclusive programming.

Using a DEIA perspective, Washington Evaluators will expand opportunities for key audiences to engage in outstanding Community Engagement programs that enrich members’ professional

development and strengthen evaluation capacity in nonprofits in the Washington, DC area and beyond.

► Objective 1.1: Enhance Community Engagement (CE) and Programs outreach and program structure to increase volunteer and participant engagement.

- Develop and activate outreach protocols that welcome and ensure a diverse and robust volunteer pool.
- Build on WE programming efforts to increase volunteer engagement to both present available opportunities and connect with members about how else they would like to engage with WE.
- Build a robust University Ambassador (UA) program such that WE has engaged UAs in all Washington, DC region colleges and universities with degree programs in evaluation.
- Develop plans to make access to these opportunities more equitable, regardless of location and welcoming evaluators at all career stages.
- Enhance maturity of systems and processes to align with best practices in operating mentorship and Evaluation Without Borders programs, while at the same time keeping quality control procedures, oversight, and administration burden manageable given WE is volunteer led.

► Objective 1.2: Increase engagement of nonprofit leaders and staff to increase the number of partnerships for Evaluators Without Borders and other programs.

- Using a DEIA lens, identify underrepresented nonprofits and develop and activate outreach protocols focused on these nonprofits.
- Support new and emerging evaluators engagement in pro bono evaluation service and create synergies with Mentor Minutes, the New Professional Scholarship, and other programming.

► Objective 1.3: Increase the number of WE activities that directly support the professional development of new and emerging evaluator WE members from two (i.e., New Professional Scholarships and Mentor Minutes) to five.

- Support students and other new and emerging evaluators in obtaining meaningful professional development experiences through CE and other programming.
- Develop defined pathways for new and emerging evaluator engagement and leadership in Evaluation Without Borders, University Ambassadors, and WE Board committees.

► Objective 1.4: Implement a process to track progress and success across all Community Engagement programs to inform improvement efforts and share lessons learned with the field.

- Develop and implement a tracking system across all CE programs that is low burden and easy to sustain overtime.

Strategic Goal #2:

Diversify professional development opportunities and expand access and belonging for the Washington Evaluators community.

Expand opportunities for WE members (and prospective members) to engage in professional development in an environment of belonging and inclusion and strengthen evaluation capacity in the DC metro area and beyond.

► Objective 2.1: Create opportunities for the entire Washington Evaluators community to develop professional skills.

- ❑ Promote WE volunteer opportunities more broadly in order to encourage all members potential members to take advantage of this professional development opportunity
- ❑ Develop, curate, and share professional development and dissemination opportunities via communications and programming efforts.
- ❑ Solicit input and feedback to ensure that offerings meet WE members' professional development needs and interests.
- ❑ Offer a range of activities/opportunities to meet prospective participants needs related to timing, topic, format, etc.
- ❑ Provide diverse opportunities for members to lead learning/networking events.

► Objective 2.2: Expand access to and belonging in professional development events/activities.

- ❑ In addition to offering members-only programming, be sure to organize some events that are open to the public to ensure access and inclusion for those who may not be able to join the WE community, as well as expand outreach to potential members.
- ❑ Seek financial support or in-kind contributions from sponsors in order to restructure and expand access.
- ❑ Proactively assess the need for and offer captioning, American Sign Language (ASL), and other adaptive supports for WE programs, in order to include a broader audience

Strategic Goal #3:

Structurally embed justice, equity, transparency, accessibility, and belonging in Washington Evaluators' leadership and Board operations.

The continued success of Washington Evaluators requires dedicated volunteers who represent the community it serves and sufficient resources to deliver activities that engage and are accessible to all populations of the membership and potential membership. Washington Evaluators strives to be equitable, transparent, and effective in administering its resources and recruiting volunteers for the Board of Directors and committees. Washington Evaluators will restructure policies, procedures, operations, use of resources, and member and volunteer engagement to redress structural inequities.

► Objective 3.1: Accelerate efforts to engage, recruit, and retain diverse volunteers and leaders of Washington Evaluators.

- ❑ Accelerating recruitment of diverse new leaders for positions of service in Washington Evaluators will help ensure the organization's sustainability and continued ability to serve all

evaluators in the community when implementing the goals and objectives outlined in this Strategic Plan. Diversity and equity are critical to the leadership pipeline in the long term, especially since a member must serve as a Board member for 9 months prior to running as President-Elect for a 3-year term on the Board.

- The Washington Evaluators committee infrastructure can provide meaningful opportunities for leadership development for individuals while leveraging their perspectives and contributions to engage and attract more and diverse members to the organization.
- All Board members, in addition to the President-Elect, will proactively recruit individuals to serve on or chair committees and task forces with the strong intention of expanding diversity of perspective and representativeness of the Board.
- Washington Evaluators will accelerate efforts to transparency, accessibility, and inclusivity during recruitment for Board positions, including extensive outreach and providing clarity on roles, responsibilities, competencies, and level of effort.
- The Board of Directors will create a culture of belonging, trust, and acceptance where individuals feel valued, supported, and heard. The Board will examine organizational norms and behaviors to identify, acknowledge, and remedy practices antithetical to an inclusive environment. The culture of belonging will be enabled by Board members truly listening and understanding others' perspectives, encouraging openness to change and learning, and promoting individual and collective accountability.

► Objective 3.2: Maintain the financial sustainability of Washington Evaluators and use funds to redress structural inequities.

- A strong financial situation for Washington Evaluators ensures the organization will continue to provide quality programming that is also equitable to its members. The Board of Directors strives to exercise in good faith its fiduciary duty to the members of the organization and to be transparent about financial decisions.
- Washington Evaluators will accelerate the redress of structural inequities by redistributing financial resources to serve the marginalized and vulnerable segments of the population it represents.

► Objective 3.3: Ensure the Board of Directors operates and makes decisions in a manner that is effective, transparent, accessible, and reaches out to marginalized groups of the population it serves.

- The Washington Evaluators Board will regularly examine, edit, and update the Bylaws, policies, and procedures to ensure they reflect the organization's values and priorities for advancing diversity, equity, and inclusion for both members and potential members. The Board of Directors will regularly review the Bylaws to ensure that the organization's structure continues to serve and align with the organization's and its members' needs, especially marginalized segments of the community it serves. To accomplish this, the Board of Directors will identify, acknowledge, and remedy the practices and behaviors antithetical to advancing equity and inclusion.
- The Board of Directors will review, edit, and update policies, procedures, meeting minutes, and other documents for transparency and accessibility, ensuring that the language is plain, inclusive, and antiracist and that materials are disseminated in user-friendly and accessible formats.

- As volunteers join the Board of Directors periodically, the Board will produce and revise training mechanisms to share knowledge and ease burden on Board members. Washington Evaluators will develop and maintain appropriate training and procedural documentation. Each year, the Board will strive to distribute work equitably across Board positions and recruit volunteers as necessary to lighten individual volunteers' level of effort required.
- The culture and history of Washington Evaluators is constantly evolving, and sufficient records are needed to maintain this information over time. Washington Evaluators will strive to provide public documentation about the history of the organization and its decision making.
- The Board of Directors will strive to enhance and expand its communication and outreach efforts for maximum transparency and accessibility, as well as to solicit feedback from both members and non-members for continuous learning and improvement.

Potential Areas for Future Consideration and Exploration

Through the course of developing the strategic plan, Board members offered numerous suggestions for further consideration. Several ideas are noted below that merit future exploration in achieving the strategic goals of the organization.

1. The scope and range of the WE community appears to be expanding beyond the Washington, D.C. metro area. However, this strategic plan did not place special focus on the non-local and international members of the WE community.
2. This strategic plan also did not place special emphasis on outreach and support for heterogeneity in field or discipline, area of application, occupation (e.g., practitioners, academics), or sector of employment (e.g., federal government, non-profit organization, universities).

Strategic Plan Approval and Update Process

By approving this plan in August 2021, the Board intends that future Washington Evaluators Boards will use this framework, with appropriate modification, to review organizational achievements and to continue making progress in building and maintaining a strong network of evaluators in the Washington, DC region.

In order to ensure this plan is relevant each year for new Boards of Directors, following Board elections in the fall, the incoming President and the outgoing President should consult with each other, as well as outgoing and incoming Board members to develop an annual action plan. In January the Board should seek to approve an annual action plan to reflect that year's goals, consistent with this longer-term vision. Periodically, the Board should conduct a complete review of the plan with member feedback, to ensure the objectives continue to reflect the needs and mission of Washington Evaluators. Finally, this plan, annual action plans, and any proposed future updates should be made publicly available on the Washington Evaluators website to promote accountability for our Board, volunteers, members, and community.