

WASHINGTON EVALUATORS
DRAFT STRATEGIC PLAN
(May 2, 2017)

"Strengthening the Evaluation Community in the Washington Metropolitan Area"

FOR MEMBER COMMENT

2017 BOARD OF DIRECTORS

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[May XX, 2017]

Fellow Evaluators –

Five months into a remarkable year for the field of program evaluation in the Washington, DC area, Washington Evaluators is as active as ever. I am continuously reminded of the incredible dedication those in the DC-area have to promoting and advocating for evaluation, and I am inspired by the dedication our members show to promoting the field and our profession.

The spirit of strengthening evaluation is widespread, and that is precisely the motivation that led to the creation of a new Washington Evaluators Strategic Plan. A hallmark of the evaluation profession is assessing actions against stated goals. With the creation of this plan, Washington Evaluators as an organization is not only demonstrating the value of this proposition, but actively pursuing a well-known organizational best practice. 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 the organization strives to focus on "Strengthening the Evaluation Community in the Washington Metropolitan Area."

Currently Washington Evaluators performs well on many levels, but there is always room for improvement and a need to know where we are starting from. As Washington Evaluators becomes more mature as an organization, this plan will be a guide for the Board of Directors. It is my hope and intent that in coming years, future Boards will review and update the plan to ensure that the members of Washington Evaluators are receiving useful services and professional development opportunities that truly serve the Washington, DC community well for years to come.

--Nick

Nick Hart, Ph.D.
2017 President
Washington Evaluators

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Introduction

Strategic planning is a process through which organizations can delineate their vision and goals, and develop approaches and procedures to ensure those goals are met. Planning today will affect Washington Evaluators future success in meeting the needs of our members.

As Washington Evaluators has grown over the past 33 years and the make-up of the organization's membership has changed, we recognize that the members' goals for the organization may also have evolved. Acknowledging the value of periodic review and goal-setting as critical elements of successful organizational management, this strategic plan aims to guide the future actions of the Board of Directors. This plan, in particular, will help ensure that the top priorities of our members guide the day-to-day operations of the Board and that the overarching goals drive future planning in the organization.

Strategic plans are not intended as static documents; rather this plan is a living document that will require input and action of the entire organization's membership to be successful. Therefore, beneath each of the strategic goals and objectives (designated with ►) [the Board will establish individual actions]. Because the plan was approved mid-2017, many of these actions are well underway.

At the conclusion of this plan is a description of the future process to ensure Washington Evaluators continues periodic review and update of this plan. Notably, this plan will lay out clear goals and objectives, all of which are realistic, specific, and attainable. And this is the challenge for the Board of Directors—to effectively implement the plan now, and in the future, and ensure the plan is never out of date.

[Placeholder for WE member feedback description – to be added for final version in May 2017]

Washington Evaluators Mission Statement

Washington Evaluators is devoted to serving the evaluation community by advocating for the growth of the evaluation profession and by fostering state-of-the-art knowledge and information sharing about evaluation practice. Based in the Washington, DC metropolitan area, 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.

About Washington Evaluators

Founded in 1984, Washington Evaluators is one of the oldest professional evaluation organizations in the United States. Washington Evaluators supports the growth of the evaluation community and profession in the DC-area by promoting individual development of evaluation expertise, knowledge sharing, and collaboration. Washington Evaluators services members by facilitating professional development events, networking, social interactions, as well as publication of upcoming evaluation events and opportunities in the region. Our members serve in government, non-profits, businesses, academia, and more.

Strategic Goals of Washington Evaluators

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 four key strategic goals: strengthen the sustainability of the evaluation community; enhance evaluation relationships and interactions; support individual evaluators' professional development needs; ensure strong administration of the organization. Each of these four strategic goals is a core component of the Washington Evaluators mission, and each suggests specific potential contributions to the evaluation community in the Washington, DC region that form the basis for objectives (►)described below.

Strategic Goal #1:

Strengthen the Sustainability of the Evaluation Community

Washington Evaluators strives to strengthen the sustainability of the evaluation community, within the DC-area and nationally and recognizes this is a fundamental role of the organization. This strategic goal denotes Washington Evaluators' unique ability and position to serve as a national leader to strengthen the sustainability of the evaluation. As one of the oldest professional evaluation organizations in the United States, Washington Evaluators is well-suited to provide expertise to other organizations and individuals throughout the country, but only so long as the organization is itself sustainable. Further, by geographic proximity to the nation's capitol, many leaders in evaluation policy are located in the D.C. area. This access allows Washington Evaluators to serve in a vital role of providing connections to government agencies, evaluation contractors, and non-profit and think tank leaders to support the evidence movement and a vibrant evaluation community.

► Objective 1.1: Recruit and help educate the next generation of professional evaluators in the Washington area.

- Recognizing that new evaluators are constantly entering the profession, Washington Evaluators will support strategies for recruiting and serving new professionals and students in the Washington, DC region.
- Washington Evaluators will support and help publicize student conferences and educational opportunities to student members in the Washington, DC region.
- Washington Evaluators will maintain connections with local universities directly engaging in training the next generation of program evaluators, and seek to ensure a collaborative and engaging relationship.
- Washington Evaluators will explore strategies for supporting new professional in the DC area in their acclimation to the profession, and the evaluation community locally and nationally.

► Objective 1.2: Promote the field of evaluation nationally.

- As an affiliate of the American Evaluation Association, Washington Evaluators will actively support the goals and priorities of the American Evaluation Association including long-term and short-term interests.

- Every four years the national conference of the American Evaluation Association returns to Washington, D.C. Washington Evaluators will support the conference every four years by facilitating the Local Arrangements Working Group (LAWG), which serves to AEA with the coordination of conference outreach and logistics. LAWG volunteers are charged with mobilizing local expertise and resources to enhance the annual conference and facilitate communication with local evaluators about the event.

► Objective 1.3: Provide expertise to other professional evaluation development and advocacy organizations.

- Washington Evaluators will work collaboratively to enhance the sustainability of the Baltimore Area Evaluators (BAE) affiliate of the American Evaluation Association. BAE is the closest affiliate to Washington Evaluators by geographic proximity and the sustainability of a strong affiliate in Baltimore helps to enhance the evaluation community on the East Coast.
- A Washington Evaluators Board Member will represent the organization in the American Evaluation Association's Local Affiliates Collaborative (LAC), serving as an active member and participant in all LAC functions.
- Washington Evaluators will support other AEA affiliates and promote professional organization events that may be of interest to members of Washington Evaluators, including regional conferences and professional development events.

► Objective 1.4: Recruit and retain DC-based evaluators to support organizational sustainability.

- Continuous recruitment of new members – including professionals, students, and organizational sponsors – helps to ensure new ideas and knowledge are integrated into the organization. Washington Evaluators will endeavor to continually pursue new members, including individuals who are also members of the American Evaluation Association or Federal government evaluators, who are not otherwise Washington Evaluators members.
- Once individuals join Washington Evaluators, retention provides a critical indicator of the quality of services and benefits provided through membership. Retention also ensures that the existing network of evaluators in the Washington, DC region continue to help build and maintain the evaluation community. Washington Evaluators will seek to continuously improve annual retention rates.

► Objective 1.5: Clearly communicate the benefits of membership and promote evaluation to the community.

- As a professional organization, the benefits of joining Washington Evaluators and participating in activities must be apparent across the community. Washington Evaluators will clearly communicate the benefits of membership and promote the field of evaluation to

non-members and members.

- Clear communications with members of Washington Evaluators about the benefits of membership serve a critical role in encouraging individual renewals based on the benefits of continued participation in opportunities and activities. Washington evaluators will specifically seek to communicate directly with members about opportunities that are exclusive to members.
- Clear communication with the evaluation community in a modern era requires a website that reflects the needs of the organization and the community. Washington Evaluators will maintain a website with information about the organization and upcoming events, and that provides resources for the betterment of the evaluation community in the DC-area.

Strategic Goal #2:

Enhance Evaluation Relationships, Interactions, and Resources

The goal to enhance evaluation relationships and interactions, and facilitate partnerships among individual evaluators and member organizations in the Washington, DC area provides a broad means to promote evaluation generation and use through knowledge sharing. Whether through interactions with fellow **Washington Evaluators** members or those in other corners of the evaluation community, relationships within and across the evaluation community represent a fundamental ingredient to a successful evaluation enterprise.

► Objective 2.1: Encourage increased communication between Washington Evaluators members about evaluation activities.

- As a *community* of practice, the relationships of individual Washington Evaluators members to each other play a vital role in the success of the organization's knowledge sharing commitment. Thus, Washington Evaluators will support individual members' efforts to communicate with each other about evaluation activities and opportunities through members-only thematic networking or social events, the website discussion board (WEval Forum), and access to contact information for other members.

► Objective 2.2: Facilitate networking and introductions of members.

- Networking events provide opportunities for members to establish connections with others in the evaluation community, providing additional incentives to maintain membership status in the organization. Networking events also provide an opportunity to introduce non-members to Washington Evaluators, helping to ensure new members are continually pursued (see Objective 1.4). Washington Evaluators will strive to host networking events for both members and non-members, with the intention of facilitating the introduction of useful professional connections.
- Knowledge about individual members' expertise and interests in evaluation can encourage greater familiarity with evaluators across the community, including through profiles of members.

► Objective 2.3: Develop strategic partnerships to facilitate cross-organizational interactions and relationships

- Partnership with leading evaluation organizations in the Washington, DC region is a means to ensure members of Washington Evaluators maintain connections to organizations and build ongoing relationships with the evaluation community that may extend beyond our members. For example, in 2016, Washington Evaluators partnered with several organizations to co-sponsor events, including the American Educational Research Association (AERA), the Alliance for Peacebuilding (AfP), American University (AU), and the American Bar Association's (ABA) Rule of Law Initiative (ABA). These events provided Washington Evaluators members with the opportunity to build relationships with the broader evaluation community. In addition to this, the latter three professional development events—co-sponsored with AfP, ABA, and AU—were all hosted at their offices, providing Washington Evaluators access to free and convenient event facilities. The event with AERA included joint funding for a social event, allowing Washington Evaluators members to meet others interested in educational research and evaluation. Washington Evaluators will strive to continuously build new partnerships that improve the evaluation community in the DC-area, while also serving the needs of the organizations members.
- Occasionally partnerships may manifest in regions or contexts beyond the DC-area. For example, in 2014 Washington Evaluators partnered with two voluntary evaluation organizations in central Asia, in an institutional and capacity building project. Washington Evaluators will continue to explore activities that may be mutually beneficial, including with other VOPEs.

***Strategic Goal #3:
Support Individual Evaluators' Professional Development***

Even though the evaluation field in the U.S. does not require a credential, evaluators must maintain continuous learning about evaluation in order to be prepared to best serve a continually evolving field. Washington Evaluators' objective to support individual evaluators' efforts to affordably improve their expertise and knowledge about evaluation, includes knowledge of state-of-the-art approaches to methods, policies, and approaches.

► Objective 3.1: Develop group opportunities for members and the DC evaluation community to develop professional skills

- Regular professional development events – including brown bags, evening seminars, and virtual events/webinars – help ensure members have opportunities to improve their knowledge and expertise of evaluation methods, policies, and approaches. Professional development events not only provide opportunities to learn, but also serve as networking events (see Objective 2.2).
- Many types of intensive professional development are not conducive to short-term meetings or seminars, and may require more deliberate or lengthy sessions to convey needed knowledge about particular topics. Washington Evaluators will support more intensive professional development opportunities when possible.

► **Objective 3.2: Develop individual opportunities for Washington Evaluators members to share and receive personalized development**

- Short-term professional mentoring can help individual evaluators address challenges or identify opportunities at a more individualized level. Washington Evaluators' Mentor Minutes initiative aims to connect current members to experienced evaluation professionals in the community through short-term mentorship opportunities that establish mutually beneficial professional connections.

Strategic Goal #4:

Facilitate Strong Administration of Washington Evaluators

The continued success of Washington Evaluators requires dedicated volunteers and sufficient resources for all of the activities described in this Strategic Plan. Washington Evaluators strives to facilitate strong administration of its resources, and recruiting and training volunteers for the Board of directors and committees.

► **Objective 4.1: Maintain the financial sustainability of Washington Evaluators.**

- A strong financial situation for Washington Evaluators ensures the organization can continue to provide quality programming each year. The Washington Evaluators Board will strive to always to exercise in good faith its fiduciary duty to the members of the organization.

► **Objective 4.2: Recruit and retain volunteers to support Washington Evaluators operations and continuity of leadership.**

- Recruiting new leaders for positions of service in Washington Evaluators will help ensure the organization's sustainability and continued ability to implement the goals and objectives outlined in this Strategic Plan. The Board of Directors itself constitutes an important pipeline, with both elected and appointed positions. Elections are held annually for the President-elect, who serves a three-year term, with one-year each as President-Elect, President, and Past-President. Elections are held biennially for the positions of Treasurer and Secretary. Typically the election planning process begins in September with dissemination of a call for nominations to members in October, slating of candidates and elections in November. Nominees submit statements of qualifications, vision, and interests by the second week of October.
- The Washington Evaluators committee infrastructure can provide meaningful opportunities for leadership development, and should be a priority for Board members to recruit individuals to serve on committees and task forces, based on members' interests. Washington Evaluators will continue to build and maintain a robust committee infrastructure to serve the needs of members while recognizing the organization is supported by volunteers and there is a constant need for leadership opportunities in addition to service on the Board of Directors.
- Recognition for service is rarely an expectation, but a small gesture in acknowledging the roles volunteers have in sustaining and improving organizational activities. Washington

Evaluators will make a more concerted effort to recognize the contributions of volunteers to the organization who distinctly improve the evaluation community, consistent with the goals of this Strategic Plan.

► **Objective 4.3: Ensure the Board of Directors operates effectively and efficiently.**

- The policies and procedures for the Board of Directors must be reviewed from time to time to ensure the needs of the organization are accurately and efficiently reflected in how the Board operates. The Washington Evaluators Board will periodically review policies and procedures and make updates as appropriate, including proposing amendments to the Bylaws.
- The committee structure built into the Bylaws should be regularly reviewed as should the Washington Evaluators Bylaws to ensure that the organizational alignment continues to serve the organization's and its members' needs as well as consistent with their personal and professional goals.
- As new volunteers join the Board of Directors periodically, the Board needs training mechanisms in place for providing knowledge sharing about culture, key terms, organizational history, the Bylaws, and information technology infrastructure. Washington Evaluators will develop and maintain appropriate training procedures.
- 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 publicly provide documentation about the history of the organization.

Strategic Plan Approval and Update Process

By approving this plan in 2017, 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 maintain a strong network of evaluators in the Washington, DC region.

In order to update this plan each year with actions specific to each new Board, 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 propose updates to this plan, as necessary. In January the Board should seek to approve an updated plan to reflect that year's goals. From time-to-time, no less than every five years, the Board should conduct a complete review of the plan with member feedback, beyond the goals and annual actions, to ensure the objectives continue to reflect the needs and mission of Washington Evaluators. Finally, this plan and any future updates should be made publicly available on the Washington Evaluators website to promote accountability for our Board, volunteers, and members.