2017 ANNUAL ACTION PLAN

www.washingtonevaluators.org
2017 BOARD OF DIRECTORS

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Washington Evaluators Mission Statement

Washington Evaluators is devoted to strengthening the evaluation community in the Washington, DC area. Washington Evaluators serves 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.
Fellow Evaluators –

The Board of Directors recently approved a new Strategic Plan for Washington Evaluators, and this Action Plan for 2017 is the first to align directly with the new goals and objectives for the organization. Outlined in this 2017 Annual Action Plan are a number of specific action items (✓) that indicate how the Board intends to progress toward achieving the larger goals for the organization. Underneath each action item is also an indication of how each will be measured or reviewed at the end of the year (◇).

As I said in a letter to our membership at the beginning of the year: I'm excited for Washington Evaluators to play a crucial role that increasingly supports our community and profession. This action plan is one small step in that direction. All of these actions are reasonably attainable – and some are even bold and ambitious – as Washington Evaluators embarks on a renewed effort for continuous organizational improvement.

The Board and our many volunteers have much work to do in this exciting year for evaluation in DC, but we are up to the challenge.

Regards,

Nicholas R. Hart, Ph.D.
2017 President
Washington Evaluators
Contents

Strategic Goal #1: Strengthen the Sustainability of the Evaluation Community ......................... 4
  ► Objective 1.1: Recruit and help educate the next generation of professional evaluators in the Washington, DC area................................................................. 4
  ► Objective 1.2: Promote the field of evaluation nationally .................................................. 5
  ► Objective 1.3: Provide expertise to other professional evaluation development and advocacy organizations.......................................................... 6
  ► Objective 1.4: Recruit and retain DC-based evaluators to support organizational sustainability .......................................................... 7
  ► Objective 1.5: Clearly communicate the benefits of membership and promote evaluation to the community .............................................................. 8

Strategic Goal #2: Enhance Evaluation Relationships, Interactions, and Resources ................. 10
  ► Objective 2.1: Encourage increased communication between Washington Evaluators members about evaluation activities ........................................... 10
  ► Objective 2.2: Facilitate networking and introductions of members ....................... 11
  ► Objective 2.3: Develop strategic partnerships to facilitate cross-organizational interactions and relationships ................................................ 12

Strategic Goal #3: Support Individual Evaluators' Professional Development ....................... 12
  ► Objective 3.1: Develop group opportunities for members and the DC evaluation community to develop professional skills .................................... 12
  ► Objective 3.2: Develop individual opportunities for Washington Evaluators members to share and receive personalized development .................................... 13

Strategic Goal #4: Facilitate Strong Administration of Washington Evaluators ....................... 13
  ► Objective 4.1: Maintain the financial sustainability of Washington Evaluators ......... 13
  ► Objective 4.2: Recruit and retain volunteers to support Washington Evaluators operations and continuity of leadership ........................................ 14
  ► Objective 4.3: Ensure the Board of Directors operates effectively and efficiently .... 15
Strategic Goal #1: Strengthen the Sustainability of the Evaluation Community

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

  ✓ The Washington Evaluators President, with approval of the Board, will establish the New Professional and Student Task Force in 2017, charged with developing a strategy for Board consideration and future execution.

    ✱ President
    ▶ Successful completion of this action will be measured by the submission of a plan from the Chair of the New Professional and Student Task Force with recommendations to the Board by Dec. 31, 2017, for consideration by the Board in 2018.

- Washington Evaluators will support and help publicize student conferences and educational opportunities to student members in the Washington, DC region.

  ✓ In 2017, Washington Evaluators will assist in publicizing the call for proposals, registrations, and awareness about the broader evaluation community in DC for the DC Consortium Student Conference on Evaluation and Policy (SCEP), specifically supporting the conference's job fair and networking events.

    ✱ Communications Chair
    ▶ Successful completion of this action will be measured by emails to student members and tweets publicizing the event, as well as contacts made by members of Washington Evaluators during the job fair.

  ✓ In 2017, Washington Evaluators will assist in publicizing the calls for proposals and announcements of other conferences relevant to program evaluation with an emphasis on student participation.

    ✱ Communications Chair
    ▶ Successful completion of this action will be measured by emails to student members and tweets publicizing the event.

- 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.

  ✓ In 2017, the Washington Evaluators Board and the New Professional and Student Task Force will review the existing University Ambassadors program to determine whether program modifications are merited in 2018.

    ✱ Communications Chair
    ▶ Successful completion of this action will be measured by discussion of the activity during a Board meeting.
Washington Evaluators will explore strategies for supporting new professionals in the DC area in their acclimation to the profession, and the evaluation community locally and nationally.

The Washington Evaluators President, with approval of the Board, will establish the Scholarship Task Force in 2017, charged with developing a proposal for a new scholarship to be awarded with the express purpose of supporting new professionals in the field. If approved by the Board, the scholarship will first be awarded in 2017.

- President and Scholarship Task Force Chair
- Successful completion of this action will be measured by submission of a scholarship proposal by the Chair of the Task Force to the Board in April 2017. If approved by the Board, completion of this action will be further measured by successful award of the scholarship subject to the terms agreed to by the Board and follow-up with recipient(s) regarding acclimation into the evaluation community.

**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.

In 2017, the American Evaluation Association has prioritized efforts to engage in a series of national dialogues to "reflect and promote positive actions on the deeply rooted, and structurally intertwined issues behind the headlines that propel racial, ethnic, and class disparities in our own society." Washington Evaluators will work with AEA to co-sponsor a dialogue in the Washington, DC area and to promote further dialogue.

- President
- Successful completion of this action will be measured by successful completion of the Race and Class Dialogue, and promotion of the dialogues held in other cities.

The American Evaluation Association recognizes that "Evaluation is an essential function of government." Washington Evaluators will contribute to efforts that recognize the role of evaluation in improving government policies by co-sponsoring an initiative with AEA's Evaluation Policy Task Force to encourage professional to promote evaluation to policymakers.

- EvalAction Task Force Chair
- Successful completion of this action will be measured by individual registration and participation counts, and follow-ups via a survey to participants for the EvalAction initiative in November 2017.

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 AEA by contributing to 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.

- In 2017, the LAWG will provide opportunities for evaluators to experience DC, outside of the conference setting, including scheduled tours of Washington

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attractions and volunteer evaluation opportunities with local organizations. The LAWG will execute activities through a range of volunteers who contribute to local orientation, tours, communications (e.g., AEA365), and participate in subcommittees.

* LAWG Co-Chairs
  - Successful completion of this action will be measured by a successful conference experience this fall for visiting evaluators, as measured by post-event surveys conducted by AEA.

**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.

- The Washington Evaluators President, with approval of the Board, will establish the Washington-Baltimore Collaboration Task Force in 2017, charged with coordinating and executing an event of mutual benefit to the two organizations. After the event, the Task Force will develop recommendations to the Board for future coordination and collaboration between the two organizations.

  * President and Washington-Baltimore Collaboration Task Force Chair
  - Completion of this action will be assessed by event completeness, participation counts, and submission of the Task Force's recommendation for Board consideration of future actions in 2018 and beyond.

- In 2017, the Board will explore the possibility of establishing a joint membership program to encourage active roles for individuals who work in the DC area and live in the Baltimore region. Such an initiative would be deliberately designed so as to enhance BAE membership rather than reduce.

  * President and Washington-Baltimore Collaboration Task Force Chair
  - Beginning of the year and end of year joint membership in the organizations. At the beginning of 2017, 8 WE members were also BAE members.
  - Beginning of the year and end of year membership in BAE. At the beginning of 2017, BAE reported 136 members.

- 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.

- The President-Elect of Washington Evaluators will serve as the designated Board member to represent the organization to the LAC, and will actively participate in monthly meetings of the LAC in 2017.

  * President-Elect
  - Attendance Records for LAC Events should indicate active Washington Evaluators participation in events.
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.

- In 2017, Washington Evaluators will contribute to the successful execution of a training and development event for AEA's affiliates, offering the expertise of Washington Evaluators Board members in supporting other affiliates from across the country.
  - President-Elect and Past-President
  - Action to be assessed based on successful completion of an affiliate as a session prior to the annual AEA conference in November 2017.

- During the spring of 2017, the Communications Chair will assist in promoting the Eastern Evaluation Research Society's (EERS) annual conference.
  - Communications Chair
  - Tweets and Emails related to the event registration.

- In the spring of 2017, the President will advertise the number of Washington Evaluators members participating in EERS, as a conference participant or attendee. Information will be posted on the Washington Evaluators website and disseminated through social media.
  - President
  - Creation of webpage and number of tweets.

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.

- In 2017, Washington Evaluators will increase total membership by 60 members from the 2016 end of year total.
  - Membership Chair
  - Action attainment to be measured with counts of annual membership.

Washington Evaluators Membership Count, 2006-2017 YTD

Note: Year to date count for 2017 current as of May 13, 2017.
In 2017, Washington Evaluators will participate in a pilot project with the American Evaluation Association to gauge the likelihood that members who join Washington Evaluators or separately join AEA will be interested in joining the counterpart organization. The pilot will include sharing of contact information for individuals who express an interest in the other organization.

Membership Chair

Achievement of the action to be determined based on the number of contacts with AEA. Success for the initiative to be monitoring by track individuals contacted from AEA email list to determine how many subsequently join Washington Evaluators, and vice versa.

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.

In 2017, Washington Evaluators' Membership Committee will strive to achieve a renewal rate of at least 70 percent, by contacting all lapsed members within 30 days of the lapse to discuss renewal options and intentions with individuals.

Membership Chair

Measure with invoice payment breakouts from Wild Apricot, which distinguish between new and renewal status.

In 2017, Washington Evaluators will pilot the availability of multi-year individual memberships as a means to reduce burdens on individual members seeking to renew memberships.

Membership Chair

Achievement of this action will be monitoring by the number of individuals who join or renew memberships using a multi-year renewal option. Beginning of 2017 baseline: 0.

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.

In 2017, Washington Evaluators will better utilize social media to communicate member benefits, including opportunities and resources, including:
The Communications Committee will distribute an average of 15 tweets per week that promote Washington Evaluators activities, the benefits of membership, and other professional resources, activities, and opportunities in the field of evaluation. At least 3 tweets per week will promote WE membership and link to the WE membership page; and

The Communications Committee will distribute at least two LinkedIn posts per week that promote Washington Evaluators activities, the benefits of membership, and other professional resources, activities, and opportunities in the field of evaluation.

Communications Chair
Achievement of this objective will be determined through social media monitoring metrics, including impressions and views, which are indicators of reach. Twitter Baseline: in 2016, Washington Evaluators received 108,000 impressions.

In 2017, Washington Evaluators will distribute invitations for events that promote the field of evaluation to members and non-members, as appropriate, using email, list serves, and strategic partnerships with other organizations.

Communications Chair
Achievement of this objective will be monitored through email distribution in Wild Apricot (including open rates).

Washington Evaluators provide an accessible annual report to members and the community, highlighting annual accomplishments and activities in 2017.

President and President-Elect
Achievement of this action will be determined by the issuance of a final report covering activities in 2017.

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.

In 2017, the Communications Committee, or other volunteers as appropriate, will disseminate a weekly digest email that provides information for members only, including exclusive member-only events, job and contract postings, and other information.

Communications Chair
Achievement of this action will be determined by reviewing Wild Apricot email logs, and assessing open rates.

In 2017, the Communications Committee, or other volunteers as appropriate, will extend invitations to members for members-only events.

Communications Chair
Achievement of this action will be determined by reviewing Wild Apricot email logs, and assessing open rates.

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 (www.washingtonevaluators.org) with information about the organization and upcoming events, and that provides resources for the betterment of the evaluation community in the DC-area.

In 2017, the Communications Committee will engage in an overhaul of the design of the Washington Evaluators website to improve its attractiveness and effectiveness for achieving the communications priorities of the organization.

Communications Chair

In 2017, Washington Evaluators will launch a blog for routine monthly use by the President each year, in making statements relevant to the organization's members and that promote either the field of evaluation or Washington Evaluators as an organization.

President and Communications Chair

The blog was created in Jan. 2017; achievement of this action will be assessed counting the number of updates (at least 12) and reviewing unique visits in Google Analytics and Views on LinkedIn.

Strategic Goal #2:
Enhance Evaluation Relationships, Interactions, and Resources

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.

In 2017, Washington Evaluators will launch at least eight Sine Qua Non dinners to discuss the state of evaluation field of evaluation, focused on members within a defined geographic area across the metropolitan area.

President

Action to be measured by the completion of eight events in 2017, including average attendance at each event.

In 2017, Washington Evaluators will begin collecting members' Twitter handles on the membership profiles to better link members through social media.

Membership and Communications Chairs
**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.

- In 2017, Washington Evaluators will strive to host six networking events for members and non-members. In the past, after-work networking events have included happy hours, networking dinners, and the holiday party. Throughout the year, several events will specifically target groups thematically in an effort to draw interest from non-members, facilitate connections among those with similar interests, and increase geographic dispersion of events.

- In 2017, the Membership Committee of Washington Evaluators will sponsor a networking event featuring new members of the organization, to introduce them to other members and encourage integration into the Washington Evaluators community.

- Knowledge about individual members' expertise and interests in evaluation can encourage greater familiarity with evaluators across the community, including through profiles of members.

- In 2017, the Membership Committee of Washington Evaluators will develop profiles of evaluators to provide opportunities for introductions of members. Member profiles will be posted on the Washington Evaluators website and distributed in Weekly Digests at least once per month.
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. 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 organization members.

- In 2017, Washington Evaluators will pilot the availability of organizational sponsors as a new membership status, as a means to facilitate growth in membership and also the strategic enhancement of relationships across the evaluation community.
  - Membership Chair
  - Counts of number of new organizational sponsors and associated members. Beginning of 2017 baseline: 0.

- In 2017, Washington Evaluators will co-sponsor two professional development events in conjunction with The Evaluators Institute and that organization's training sessions hosted in the DC-area.
  - President
  - Action to be measured by the completion of events in 2017, including attendance at events.

Strategic Goal #3:
Support Individual Evaluators' Professional Development

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).

- In 2017, Washington Evaluators will provide at least ten professional development events, including events hosted at a mix of times and locations.
  - Program Chair
  - Action to be measured by the completion of events in 2017, including attendance at events. Washington Evaluators is also exploring the feasibility of post-event surveys.

- In 2017, recognizing members may not always be able to attend in person, Washington Evaluators will begin expanding digital participation options for members during at least three daytime events.
  - Program Chair
  - Action to be measured by the completion of events in 2017, including remote participation attendance at events relative to in person participation.
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.

In 2017, the Program Committee of Washington Evaluators will explore hosting a skill-building event for members and non-members. This pilot would explore whether members find value in seminars that seek to intentionally build evaluation skills (e.g. survey development, introductions to software, data visualization), outside opportunities already offered by the American Evaluation Association.

Program Chair
The program committee will report to the Board of Directors on the feasibility of an event by summer 2017.

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.

In 2017, Washington Evaluators will pilot the Mentor Minutes initiative, in order to provide members individual opportunities for feedback regarding careers, for reflection on professional experiences, and to help build the capacity and networks of emerging evaluators. The 2017 pilot will specifically provide a direct benefit to members and seek to understand if members see value in learning from their peers and how this learning can be facilitated.

Program Chair
To better learn if this initiative should be expanded and improved, mentors and mentees will receive post-activity surveys evaluating the efficiency of the pairing process and whether their personal goals were met (as mentee or mentor).


Strategic Goal #4: Facilitate Strong Administration of Washington Evaluators

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 exercise in good faith its fiduciary duty to the members of the organization.

In 2017, the Washington Evaluators Board will approve an operating budget, with modification as appropriate throughout the year, and the Treasurer will provide routine reports to the Board on revenues, expenditures, and assets, and a statement for all members in the annual report.

Treasurer
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 will be conducted on time, consistent with the Washington Evaluators by-laws, and with a full slate of nominees in November 2017.

- 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.

- In 2017, the Washington Evaluators Board will develop a plan for improving a diverse organizational leadership pipeline, based on best practices from other organizations, for use by the Board in future years.

- 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.

- In 2017, the Washington Evaluators Board will explore the need for and feasibility of developing an annual volunteer award, or series of awards, to recognize individuals for contributions to improving the DC-area evaluation community through service to Washington Evaluators.
Achievement of this objective will be determined by an affirmative Board action to either develop a policy or appoint a Task Force for further consideration of a proposal in 2018.

**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.

  ✓ **In 2017, the Washington Evaluators Board will create a Standard Operating Procedure (SOP) for elections to ensure continuity and smooth execution in future years.**

    - Secretary
    - Achievement of this objective will be determined by an affirmative Board vote for a SOP on Elections, no later than Dec. 31, 2017.

  ✓ **In 2017, the Washington Evaluators Board, led by the Secretary and Past-President, will review existing policies related to the purchase of alcohol during Washington Evaluators events, and propose any needed revisions to the Board.**

    - Secretary and Past President
    - Achievement of this objective will be determined by submission of a review to the Board, or with a proposed SOP.

- 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.

  ✓ **In 2017, the Washington Evaluators Board will develop plans to conduct a formal review of the committee structure during the time frame covered by this Strategic Plan.**

    - President
    - Achievement of this action will be determined by the completion of a written, Board-approved plan by Dec. 31, 2017.

  ✓ **In 2017, the Washington Evaluators Board will better communicate with current members and non-members about the organization's structure and volunteer opportunities within the organization, including by publishing such information on the public website along with means to easily contact committee and task force chairs.**

    - Communications Chair
    - Achievement of this action will be determined by the completion of information on the Washington Evaluators website conforming to the goal by Dec. 31, 2017.