The American Evaluation Association in 2020

Information for Members on the Strategic Planning Process

December 2016
Welcome, AEA community!

The purpose of this document is twofold:

1) to share information with you about the strategic planning process that’s taken place in recent years, and

2) to request your input on how AEA programming might meet your needs as it aligns with the Ends Goals in coming years.
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New to AEA? Here’s what you need to know.

The American Evaluation Association (AEA) is a professional association of evaluators devoted to the application and exploration of program evaluation, personnel evaluation, technology, and many other forms of evaluation.

Evaluation involves assessing the strengths and weaknesses of programs, policies, personnel, products, and organizations to improve their effectiveness.
The American Evaluation Association’s mission is to improve evaluation practices and methods, increase evaluation use, promote evaluation as a profession, and support the contribution of evaluation to the generation of theory and knowledge about effective human action.

The American Evaluation Association’s vision is to foster an inclusive, diverse, and international community of practice positioned as a respected source of information for and about the field of evaluation.

The American Evaluation Association values excellence in evaluation practice, utilization of evaluation findings, and inclusion and diversity in the evaluation community.

Read the Values online.
Our Members and Volunteers

AEA has approximately 7,000 members representing all 50 states in the United States as well as over 100 foreign countries.

Hundreds of volunteers and a dedicated staff undertake the work of the association.

Meet the AEA staff.
Comprised of 13 voting members, the Board of Directors makes all strategic, policy, and large-scale programmatic decisions for the association.

The 2016 Board is shown at right.

Meet the Board.
AEA’s management team includes staff with expertise in business operations, financial services, event services, communications, information technology, as well as contractors.

Denise Roosendaal, Executive Director, leads the management team.

### Our Staff

**Business Operations**

- Denise Roosendaal, Executive Director
- Gail McCauley, Sr. Operations Manager
- Zachary Grays, Sr. Associate
- Katherine Vogelsang, Sr. Associate
- Tushar Madan, Operations Assistant

**Financial Services**

- Jonathan Hutchins, Sr. Manager
- Jeffrey Reeves, Coordinator

**Education and Learning Services**

- Lauren Lawson, Manager
- Bill Prather, Coordinator
- Rachel Reclam, Coordinator
- Annie Lawson, Sr. Associate

**Contractors**

- Sheila Robinson, Blog Curator, P2i
- Cheryl Oros, EPTF

**Event Services**

- Sydney Vranna, Manager
- Mattie Weber, Manager
- Alessandra Cigna, Associate
- Elizabeth Eppinger, Sr. Associate
- Gabriel Capella, Associate
- Emilia Philip, Sales

**Communications**

- Lisa Schellenberg, Manager
- Jayne Corso, Coordinator
- Sarah Anderson, Coordinator

**Information Technology**

- Pete Smithson, Manager

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[Meet the staff](#)
AEA's Topical Interest Groups (TIGs) are subgroups that provide networking and conference program development among members with similar interests.

Our 55 TIGs have anywhere from 15 to 1,071 members each.
AEA's 31 local or regional affiliates are independent, regionally-defined professional associations that are recognized by AEA as sharing a mission consonant with our own.

View a full listing of affiliates.
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Adopting Policy Governance

_Governance_ is the way an organization chooses to make decisions, set priorities, and allocate resources.

In 2008, AEA adopted a version of policy governance as an organizational governance approach.

This approach defines the relationships between an organization’s members/stakeholders (referred to as _owners_ in Policy Governance terminology), its board of directors, and its management.

To learn more about policy governance, check out _The Policy Governance Manual and the Role of the Board Member_ by John and Miriam Carver.
Policy Governance and You

Because the Policy Governance methodology makes a clear distinction between operational and strategic functions, the membership can sometimes be confused on where to go with their questions or ideas.

Here’s a sample of the kinds of questions that members might have and where they are most appropriately answered.

I have an idea for a new program, or product, or an idea for the annual conference. Where do I go?

There is a desire for an Affiliate in my local area. Where do I go? (Management starts the process but final board approval is required.)

I have an idea for a new TIG. Who do I talk with? (Management starts the process but final board approval is required.)

I would like to volunteer for a Working Group (accountable to the Management for operational activities). Where do I start?

What is AEA’s future strategy and direction?

I am concerned about the federal policies for evaluation or the future of the evaluation profession. Who can I speak with?

I am a member of another association which might be interested in working with AEA on a collaborative project. Who can I speak with?

I would like to volunteer for a Task Force (accountable to the Board on strategic/governance topics). Where do I start?
Adopting Policy Governance

Under policy governance, a primary function of the leadership of an organization—like AEA’s Board of Directors—is to set the organization’s strategy by articulating Ends Goals.

The primary function of the management is to execute the strategy in the form of development and implementation of programs and products that fulfill the strategic ends within the means and policies set by the board.

The Board then monitors management for the successful progress towards the strategic ends.

AEA’s *Governing Policies Manual* is a 37-page manual that delineates the role of the leadership and the role of the management.
The Ends Goals

AEA’s Ends Goals were redeveloped during 2013 and 2014 with the Board of Directors.

The Ends Goals are meant:
- to be forward-thinking and strategic,
- to drive the direction of AEA’s projects and programs, and
- to describe the future state of the organization and society if AEA were successful in all of its endeavors.”

There are five primary goals.

Some of the goals contain clarifying statements that further define the goals.

The first two goals are shown at right.

1. Evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.
   - A growing body of knowledge advances the theories, practices, and methods of evaluation.
   - Evaluators teach and learn evaluation in diverse professional settings.
   - Evaluators promote communication with and meaningful use of evaluation by stakeholders.
   - Evaluators develop new knowledge about evaluation, and disseminate and transfer it widely.
   - Evaluators use a multicultural lens to engage diverse communities in evaluation effectively and with respect, to promote cultural, geographic, and economic inclusiveness, social justice, and equality.

2. Evaluators share and benefit from a sense of professional affiliation.
   - A diverse community of professionals (members and non-members alike) spans culture, discipline, geography, and political philosophy and interacts to promote high quality evaluation practice and use.
   - Evaluators are members of an evaluation community that spans culture, discipline, geography, and political philosophy.
   - Evaluators develop the capacity of communities and organizations to engage in evaluation.
   - Evaluators enrich the life of the association as well as that of other organizations, fields, and disciplines aligned with the association’s mission.

Read the Ends Goals online.
The Ends Goals

The third, fourth, and fifth Ends Goals are shown here.

3 **There is broad growth in the visibility and perceived value of evaluation.**
   • Evaluation users will expect and require high quality evaluations.
   • Evaluation users encourage understanding and use of evaluation in their settings.
   • Evaluation users have knowledge and resources to understand evaluation and make evaluation a standard practice in their organization’s operations.
   • Evaluation users are sensitive to the cultural and ethical issues that are involved in the conduct and use of evaluation that promotes the public good.
   • Evaluation users value evaluation enough to support the profession.
   • Evaluation users have knowledge and resources to make evaluation a standard practice in their organization’s operations.
   • Potential evaluation users in communities and organizations attend to and learn from evaluation and from each other.
   • People in organizations have the knowledge and skills to engage in evaluation.
   • People in other professions and disciplines know and respect evaluation theories, practices, and values.
   • People outside the field use evaluation as a vehicle for learning and improving their programs and policies.
   • The public has knowledge and resources to understand evaluation and use it appropriately.
   • The public demand valid information on programs and policies, and are able to understand it.
   • The public views evaluation as a profession.

4 **Informed policy builds the capacity of communities and organizations to engage in and learn from evaluation.**

5 **AEA Members value their membership.**

Read the Ends Goals online.
Once the Ends Goals were written, a subset of the Board thought about how the Ends Goals were connected to AEA’s Mission.

The purpose of this mapping was to ensure that the newly written Ends Goals aligned with the organization’s overall mission.
### Aligning the Ends Goals with AEA’s Mission

**Board Focus**

<table>
<thead>
<tr>
<th>Ends Goals</th>
<th>Mission Connection</th>
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<tbody>
<tr>
<td>1. Evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.</td>
<td></td>
</tr>
<tr>
<td>2. Professional development programs expand in content and delivery options such that AEA is considered the leading source of high-quality PD content and delivery.</td>
<td></td>
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<tr>
<td>3. ED interpretations: Vision of Success/Outcomes</td>
<td></td>
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<tr>
<td>4. Support the contributions to the practice and knowledge about effective human action.</td>
<td></td>
</tr>
<tr>
<td>5. Expand ED and AS role in the outcomes of interest.</td>
<td></td>
</tr>
<tr>
<td>Management Focus</td>
<td>Action Plans</td>
</tr>
<tr>
<td>1. Create a PD Action Plan to include expanding AEA’s professional competency approach to interpretation of PD outcomes. (Complete by 2/17)</td>
<td></td>
</tr>
<tr>
<td>2. Create a Plan for Professional Competencies also recommendations and implications for operations. (Complete by 12/16)</td>
<td></td>
</tr>
<tr>
<td>3. Develop technology through innovative tools to enhance website, a lively platform, increase ease of use, accessibility, awareness, outreach. (Deadline 6/17)</td>
<td></td>
</tr>
<tr>
<td>4. Investigate the understandings of a publication committee to sustain journal publication. (Target 6/15)</td>
<td></td>
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**Board Focus**

<table>
<thead>
<tr>
<th>Success Indicators</th>
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<tbody>
<tr>
<td>1. The current Professional Development opportunity maintains a rating of 4.0 or higher each year.</td>
</tr>
<tr>
<td>2. PD Action Plans developed in 2015, implemented for 2016. 50%-60% of survey respondents consider AEA’s leading source of PD evaluation content by 2017.</td>
</tr>
<tr>
<td>3. The 2016 PD Action Plans, developed in first quarter of 2015, report that 75% of member respondents report awareness of both workshops and the online forums. 45% of members report using the documents and educational tools (behavioral guides) in their practice.</td>
</tr>
<tr>
<td>AEA members value their membership.</td>
</tr>
<tr>
<td>AEA membership is engaged in AEA’s programs, products, and services. The PD programs are well attended and evaluated as valuable. AEA is reflecting a highly diverse population within the membership message.</td>
</tr>
<tr>
<td>3. Membership growth and engagement</td>
</tr>
<tr>
<td>Action Plan (Requests by 9/15) to reflect Board Growth Discussion.</td>
</tr>
<tr>
<td>4. Increase the % of members surveyed who indicate AEA membership as valuable. (Measurements to be adjusted upon survey results.)</td>
</tr>
</tbody>
</table>

[View this table online.](#)
For example, the first Ends Goal is that evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.

This goal is reflected in two places in AEA’s mission statement.
Then, AEA’s Executive Director, Denise Roosendaal, took that work and figured out how to connect the Ends Goals to the management’s work.

What would the Ends Goals look like from an operational perspective?

View this table online.
Aligning the Ends Goals with AEA’s Mission

Next, the Board drafted Success Indicators to assess the management’s actions.

View this table online.
AEA's management wanted to see how existing programming (listed along the top) was connected to the Ends Goals (listed along the left).

AEA’s management designed an initial draft and then gathered input from the Board of Directors, from several TIG leaders, and from various Working Groups.

View this table online.
For example, the first Ends Goal— that evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals—is listed along the left-hand side of the table.

View this table online.
Key elements of AEA’s programming—like the aea365 daily blog, local and regional affiliates, awards, and the annual conference—are listed along the top.

View this table online.
## Aligning the Ends Goals with AEA’s Programming

This diagram shows how AEA’s programs and products are aligned with the Ends Goals.

- ▪ = This AEA program or product currently connects to an Ends Goal.
- □ = This AEA program or product has the potential to connect with an Ends Goal in the future.

### Clarifying Statements

1. Evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.

   a. A growing body of knowledge advances the theories, practices, and methods of evaluation.

   b. Evaluators teach and learn evaluation in diverse professional settings.

   c. Evaluators promote communication and meaningful use of evaluation by stakeholders.

   d. Evaluators develop new knowledge about evaluation and disseminate and transfer it widely.

   e. Evaluators use a multicultural lens to engage diverse communities in evaluation effectively and with respect, to promote cultural, geographic, and economic inclusiveness, social justice, and equality.
Aligning the Ends Goals with AEA’s Programming

Each filled-in square like ■ indicates places where the Ends Goals already connect to one of AEA’s programs.

For example, AEA aims to see evaluators develop new knowledge about evaluation and disseminate it widely, which is reflected in AEA’s existing daily blog, aea365, as well as a number of other programs and products.

View this table online.
Some of the Ends Goals are already connected to AEA’s programming.

However, we still need to expand or develop some programs to ensure that all five Ends Goals can be achieved.

Each empty square like □ shows areas with a high potential for alignment.

<table>
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<th>Ends Goal</th>
<th>Clarifying Statements</th>
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<td>3. There is broad growth in the visibility and perceived value of evaluation.</td>
<td>a. Evaluation users will expect and require high quality evaluations.</td>
</tr>
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<td>f. Potential evaluation users in communities and organizations attend to and learn from evaluation and from each other.</td>
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<td></td>
<td>g. People in organizations have the knowledge and skills to engage in evaluation.</td>
</tr>
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<td></td>
<td>h. People in other professions and disciplines know and respect evaluation theories, practices and values.</td>
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</table>
For example, the third Ends Goal is that there is broad growth in the visibility and perceived value of evaluation.

In particular, AEA wants people in other professions and disciplines to know and respect evaluation theories, practices, and values.

This section of the Ends Goal is not yet actualized through the aea365 blog, but could be better connected with future adjustments and expansions.

View this table online.
Aligning the Ends Goals with AEA’s Societal Goals

Finally, this Sustainability for Impact diagram was developed by a few Board members, including George Julnes, Kathy Newcomer, and Beverly Parsons.

They aimed to better align AEA’s activities, Ends Goals, and Societal Ends Goals, paying special attention to how AEA might affect outside audiences and have a larger societal impact.

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### Present

**Bringing These Ideas to Life**

**Envisioning AEA in 2020:**
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## Future

**Enhancing These Focus Areas Over the Next Five Years**

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- Share Your Ideas
Envisioning AEA in 2020

AEA’s management and Board are envisioning how the association can build the organization for the future.

After reviewing the gaps between the Ends Goals and AEA’s current programming, AEA will focus on six areas:

• professional development,
• research and publications,
• evaluation users,
• policy and field definition,
• communities of practice, and
• financial contributions.

These areas will be expanded in coming years to more closely connect with the Ends Goals.
Envisioning AEA in 2020

Professional Development
AEA members can look forward to new professional development opportunities in coming years.

To better align with the Ends Goals, AEA hopes to:
• expand existing internships,
• launch a Technology Center, Speakers Bureau, and competencies development;
• develop portable curricula; and/or
• expand both in-person and online training.

Ultimately, AEA would like to maximize the use of technology as well as in-person opportunities to reach a wider audience with evaluation concepts at all levels and within a wide variety of disciplines.
Envisioning AEA in 2020

Research and Publications
The association will expand its role in conducting research and creating engaging publications.

Ideas include:
• developing newsletter templates so that Topical Interest Groups can more easily communicate internally with their members;
• producing an annual report and a member survey on a regular basis;
• developing a searchable Research Database; and/or
• conducting research on the effectiveness of evaluation and making those publications available to evaluation users.
Envisioning AEA in 2020

Evaluation Users
AEA will create resources for evaluation users in the near future.

For example, AEA may:
- develop sample Request for Proposals (RFPs);
- lead trainings for evaluation users;
- host a What Is Evaluation conference;
- write articles that explain what evaluation is; and/or
- design an Evaluation Marketplace—a collaborative website where evaluators and evaluation users can share resources and work on projects together.
Envisioning AEA in 2020

**Policy/Field Definition**

AEA seeks to continue the (mostly) Federal-level policy work being done by the Evaluation Policy Task Force.

In coming years, AEA expects to be in a position to expand its state-level and international-level policy work.

AEA will also strive to continue the reach and impact of its public statements related to the field of evaluation, such as the existing Guiding Principles for Evaluators, Cultural Competence Statement, the Roadmap.

Read the public statements.
Envisioning AEA in 2020

Communities of Practice
AEA seeks to strengthen its existing communities of practice—such as the topical interest groups, or TIGs—by finding ways to encourage cross-TIG collaboration and by developing resources for incoming TIG leaders.

AEA members are given the option of joining up to five topical interest groups, but not all members take advantage of this opportunity. AEA would also like to find ways to promote TIG membership, especially for those members who have not yet taken advantage of this membership benefit.
Financial Contributions
What will it take to bring these ideas to life?

AEA is looking for opportunities to bring in new revenue in order to financially support the staffing and infrastructure that are needed to expand programs and achieve the Ends Goals.

AEA currently receives some program-related contributions (i.e., conference funding) and some small grants, and the association is looking at the possibility of sponsorships and/or a legacy contribution program.
Envisioning AEA in 2020

Financial Contributions
AEA has experienced a healthy growth in membership and conference attendance.

The association’s increased profit, cash, and investments have led to an increase in net assets, which means that AEA is in a financial position to put these ideas about professional development, research, publications, and other programs into practice.

Profit
Revenue exceeds expenses. Keeping revenue balanced with expenses is prudent financial planning.

Cash
Cash and cash equivalents have grown by a million dollars over the past five years.

Investments
Interest from these investments contributes to our net assets.

Net Assets
Net assets are our total assets minus our total liabilities.
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The association is in the early stages of planning *when* to focus on each of these new offerings.

Here’s a draft timeline that shows when AEA might expand program offerings within each of the focus areas.
This year, in 2016, the association hopes to spend time building professional development competencies and expanding the existing training offerings.

The association also hopes to enhance the e-newsletter and explore planned or legacy giving options, as well as move the policy and field definition work forward.
In 2017, with member input, the association aims to develop a professional development curriculum, expand the Summer Institute, and develop a Thought Leader Summit.

AEA also hopes to expand its own internal evaluation efforts next year.
In 2018, AEA hopes to develop a training certificate program and to begin hosting regional conferences, perhaps in partnership with local and regional affiliates.

The association also wants to build a Technology Center, Research Center, and to launch member surveys to learn more about members’ backgrounds and demographic characteristics.
2019 may see the expansion of internship opportunities, further technology enhancements, and the development of a Speakers’ Bureau.

The association also hopes to enhance the Find an Evaluator page of AEA’s website—one of the most-viewed pages on the entire site—so that evaluation users can more easily locate evaluators.
Finally, in 2020, AEA aims to launch an Evaluation Academy for AEA members and an Evaluation User Center with resources for evaluation users.
AEA aims to develop four centers over the next few years, including the:
• Evaluation Research and Policy Center;
• AEA Academy;
• Evaluation User Center; and the
• Evaluation Virtual Marketplace.

AEA’s Evaluation Research and Policy Center would involve:
• a searchable database of Evaluation Research;
• Demographics of AEA members;
• data and research to be used to support policy work; and
• state, national, international presence on policy initiatives.

This Center connects to Ends Goal 4: that informed policy builds the capacity of communities and organizations to engage in and learn from evaluation.
The AEA Academy would consist of:

• professional **internships** on evaluation;
• a **Technology Center** to learn trending technology skills;
• a **Speakers Bureau** to equip evaluators to talk about evaluation in their communities and networks;
• large scale educational programming with **innovative learning platforms**;
• **portable curricula** based on the AEA evaluator competencies;
• expanded **in-person and online** training opportunities; and
• **regional** training opportunities.

The AEA Academy connects to Ends Goal 1: that evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.
The Evaluation User Center would include:

• an enhanced Find-an-Evaluator page to link more evaluators with evaluations users;
• sample contracts or RFPs to be used for seeking evaluations or evaluators; and
• a searchable database of evaluation.

The Evaluation User Center connects to Ends Goal 3—there is broad growth in the visibility and perceived value of evaluation.

AEA’s Find an Evaluator feature is the most visited page on our website.

The redesigned page may include searchable categories; link directly to AEA members’ profiles; describe members’ leadership positions within AEA; and/or list presentations that members have given.

Evaluation users who are searching for evaluators will have more information and AEA members will be able to add more details about their skills.
Imagine a place where you can come with a question or an inquiry or collaborative initiative and be able to spontaneously engage online with the resources you need to create a greater good in society.

The Virtual Marketplace relates to two Ends Goals: Goal 2—that Evaluators share and benefit from a sense of professional affiliation—and Goal 3—that there is broad growth in the visibility and perceived value of evaluation.
AEA members,
we want to hear from you!

What might AEA look like in 2020?
Are you excited about the ideas we’ve mentioned? And what are we missing?

Please share your ideas through the Issues Tracker at http://www.eval.org/p/is/in/.

We’ve already added some discussion topics such as Ideas for AEA Programs and The Future of Evaluation to get you started.
The American Evaluation Association in 2020

For more information about AEA’s strategic planning process, please contact us at info@eval.org.

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