

**Australasian Evaluation Society**  
**Ten Year Strategy**  
**(2010-2020)**

*Leading Evaluation in*  
*Australasia*

The Australasian Evaluation Society  
PO Box 5223  
Lyneham, ACT  
Australia 2602  
Tel: +61 2 62629093  
Fax: +61 2 62629095  
Email: [aes@aes.asn.au](mailto:aes@aes.asn.au)  
ABN 13 886 280 969

# AES 10 Year Strategy

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Ten Year AES 'Strategy on a Page'

	Strategic Priorities	Objectives	Road Map
<b>AES Vision</b>  To be the pre-eminent voice and leader of evaluation in Australasia.	Evaluation knowledge transfer	<ul style="list-style-type: none"> <li>Publish and promote ideas, experiences, information and developments in evaluation theory and practice</li> <li>Exchange and develop ideas, information and experiences through gatherings and other communication</li> <li>Strengthen the role of the AES Special Interest Groups in knowledge development and management</li> </ul>	<ul style="list-style-type: none"> <li>Maintain and develop the AES Journal as a flagship of the Society</li> <li>Maintain and develop the AES International Conference and other seminars as critical forums for ideas development and exchange</li> <li>Develop a short to medium term strategy for increasing the role and activity of special interest groups and their influence in the AES</li> </ul>
	Membership Services and Governance	<ul style="list-style-type: none"> <li>Strengthen and support AES Regional Committees to: encourage and enable member participation in AES decision-making; grow the membership; enable professional networking; promote high quality evaluation practice; and provide professional learning</li> <li>Enhance participation in the AGM and reporting in general around AES decision-making</li> </ul>	<ul style="list-style-type: none"> <li>Review the operation of the Regional Committees</li> <li>Develop a Communication and Reporting Strategy</li> </ul>
	Professional Learning	<ul style="list-style-type: none"> <li>Consolidate the program and enhance the standard of Professional Learning activity to support the membership and strengthen evaluation practice in Australasia</li> </ul>	<ul style="list-style-type: none"> <li>Develop a five year Professional Learning Strategy</li> </ul>
	Quality Assurance	<ul style="list-style-type: none"> <li>Develop Australasian-specific Professional Practice Standards to encourage consistent, high quality evaluation practice, in one to three years</li> <li>Initiate a process of exploring the merits and consequences of developing and implementing an Evaluator Accreditation Scheme</li> </ul>	<ul style="list-style-type: none"> <li>Develop a Professional Standards Work Plan and establish a Professional Standards Working Group</li> <li>Establish a process for investigating evaluator accreditation and provide initial report to 2011 AGM</li> </ul>
<b>AES Mission</b>  To see rigorous evaluation as central to policy development, program design and service delivery.	Advocacy and Influencing	<ul style="list-style-type: none"> <li>Position the AES as a key source of expertise and advice for governments in Australasia on evaluation</li> <li>Establish initiatives and arrangements for partnership and collaboration between the AES and governments</li> <li>Actively encourage and support governments to consider resourcing evaluation during the developmental phase of programs</li> <li>Place more emphasis on advocating for evaluation.</li> </ul>	<ul style="list-style-type: none"> <li>Develop 10 year Government Engagement Strategy</li> <li>Assess the structural, capacity and resource requirements of maintaining a prominent advocacy and influencing role for AES and enhance the function in a realistic fashion over the short to medium term</li> </ul>
	Indigenous evaluation	<ul style="list-style-type: none"> <li>Work closely with Aboriginal and Torres Strait Islander, Maori and Pacific peoples to: promote sound, respectful and the appropriate practice of evaluation; engage Indigenous peoples in evaluation practice; enhance ethical evaluation processes; and strengthen evaluation capacity</li> </ul>	<ul style="list-style-type: none"> <li>Maintain a strategic focus on Indigenous evaluation in the short, medium and long-term, with a 10 year Indigenous Evaluation Strategy</li> </ul>
	Relationship with ANZEA	<ul style="list-style-type: none"> <li>Develop strong working relationship with the Aotearoa New Zealand Evaluation Association, for shared learning</li> </ul>	<ul style="list-style-type: none"> <li>Liaise with ANZEA to establish potential areas for collaboration.</li> <li>Create opportunities for Aboriginal, Torres Strait Islander, Maori and Pacific peoples to engage in shared evaluation learning.</li> </ul>
	Evaluation capacity development in the Asia/Pacific Region	<ul style="list-style-type: none"> <li>Position the AES as a resource for both individual practitioners and emerging national evaluation associations, following principles of partnership; self-help, demand-led and country-owned interventions and systemic capacity building with enduring impact</li> </ul>	<ul style="list-style-type: none"> <li>Establish Consultation Strategy and liaise with PNG personnel interested in M&amp;E to further identify their needs and how the AES can respond and support</li> <li>Liaise with AusAID and NZAID to establish potential collaboration in the Asia-Pacific Region</li> </ul>
	Engaging the non-government sector	<ul style="list-style-type: none"> <li>Develop evaluation capacity in the non-government sector, recognising the great diversity in the size and resources of organisations</li> </ul>	<ul style="list-style-type: none"> <li>Develop a five year Non-Government Sector Engagement Strategy</li> </ul>
Engaging academic institutions	<ul style="list-style-type: none"> <li>Improve flow of information from academic institutions to the AES membership; contribute to academic research in evaluation; promote the discipline of evaluation in higher education; strengthen AES's credentials as an expert organisation in the field.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a five year Higher Education Engagement Strategy</li> </ul>	

## 1. Introduction to the AES

The Australasian Evaluation Society (AES) is the primary Australasian professional organisation for people involved in evaluation, including evaluation practitioners, managers, teachers and students of evaluation, and other interested individuals. It has over 1000 members involved in all aspects of evaluation and performance measurement. Members meet regularly through regional groups centred in major cities in Australia and New Zealand. Professional learning workshops are conducted throughout Australasia on a regular basis.

The Society aims to improve the theory, practice and use of evaluation through:

- establishing and promoting ethics and standards in evaluation practice as a service to the community of evaluators and users of evaluations;
- encouraging advances in the theory and practice of evaluation by publishing such advances and by recognising outstanding contributions;
- providing education and professional learning in matters related to evaluation;
- providing forums for networking and the discussion of ideas including Society publications, seminars, workshops and conferences;
- acting as an advocate for evaluation and encouraging understanding about the use and application of evaluation;
- linking members who have similar evaluation interests; and
- other activities consistent with this aim.

As at August 2010, AES publications include:

- Evaluation Journal of Australasia;
- E-news;
- Guidelines for the Ethical Conduct of Evaluations;
- Code of Ethics;
- Stories of Evaluation Learnings; and
- Evaluation Reports.

A Board of Management provides overall governance and is elected annually from the membership. The AES is an Incorporated Association supported by a Secretariat based in Canberra.

The AES and its members are engaged with evaluation within a complex, dynamic policy environment across all areas of government activity and to an increasing extent within the third sector.

## 2. Background to the Ten Year Strategy

This Ten Year Strategy is the result of planning and consultation over a period of several months in 2009 and 2010.

In late 2009 the AES informally canvassed the views of AES regional representatives and their committees regarding strategic priorities for the organisation.

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Representatives and their committees were asked for their views in regard to three main questions:

1. What are the central issues in the global context that the AES should be concerned with over the next decade?
2. What are the central and priority issues for the discipline of evaluation to consider and address over the next decade?
3. What issues should the AES respond to/take a position on in relation to the broader context and evaluation over the next decade?

The responses formed the basis for the development of the *Strategic Planning Scoping Paper 2010*, (made available to the membership on the Society's website in February 2010) which was structured around the following themes:

- impacting contextual issues in the global and international context;
- issues in government that will impact on the field of evaluation over the next decade;
- the role of the AES as a strategic society influencing policy;
- emerging fields of practice in evaluation;
- evaluation of Indigenous programs and policies;
- the current and future state of evaluation methodologies and methods; and
- the role of the AES in advancing evaluation professionalism.

The Scoping Paper was the focus for a facilitated strategic planning session of the AES Board, held in Canberra on 5 February 2010. The objective of the planning session was:

*To develop a strategic vision for the AES that positions it as an influential group within the Australasian policy context and for the practice of evaluation.*

The output of the planning session was a *Draft AES Strategic Directions Discussion Paper*. With the Discussion Paper as the focus, the AES Board consulted with key sections of the membership about a future strategy for the organisation and had further planning discussions in Canberra on 19 June 2010 with the objective of framing strategic directions for the AES over the coming decade.

This *AES Ten Year Strategy* document is the outcome of the planning and consultation process. The intention of this paper is to identify the ways in which the Society may develop its strategic role over the next decade to ensure it maintains its relevance, expands its leadership role in the field of evaluation and makes the greatest contribution to its membership and the policy context within which it operates.

## 3. AES Ten Year Vision

To be the pre-eminent voice and leader of evaluation in Australasia.

## 4. AES Ten Year Mission

To see rigorous evaluation as central to policy development, program design and service delivery.

## 5. Strategic Priorities

### 5.1 Evaluation Knowledge Transfer

#### Objectives:

- Publish and promote ideas, experiences, information and developments in evaluation theory and practice to the evaluation profession and a broader audience of policy makers, program developers/managers and service delivery organisations.
- Exchange and develop ideas, information and experiences through gatherings and other means of communication involving the international and Australasian evaluation profession and related communities of interest.
- Strengthen the role of the AES Special Interest Groups in knowledge development and management.

#### Road Map:

- Maintain and develop the AES Journal as a flagship of the Society.
- Maintain and develop the AES International Conference and other seminars as critical forums for interpersonal ideas development and exchange.
- Develop a short to medium term strategy for increasing the role and activity of special interest groups and their influence in the AES.

### 5.2 Membership Services and Governance

#### Objectives:

- Strengthen and support AES Regional Committees to:
  - encourage and enable member participation in AES decision-making;
  - grow the membership;
  - enable professional networking;
  - promote high quality evaluation practice; and
  - provide professional learning.
- Enhance membership participation in the AGM and reporting around AES decision-making.

#### Road Map

- Review the operation of the Regional Committees.

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- Develop a Communication and Reporting Strategy.

## 5.3 Professional Learning

### Objectives:

- Consolidate the program and enhance the standard of Professional Learning activity recognising the important strategic role this service plays in supporting the membership and strengthening evaluation practice in Australasia.

### Road Map

- Develop a five year Professional Learning Strategy that includes:
  - Further investigate the feasibility of developing an AES accredited core professional learning program (beginning with a small number of essential modules);
  - Look for innovative ways to address the professional learning challenges posed by the turnover of membership;
  - Identify core competencies for evaluators around which professional learning and practice standards can be built;
  - Take more of a participatory approach in the development of the professional learning program and schedule, involving members and other stakeholders (such as government departments, ANAO and non-government peak bodies) in the identification of priority learning areas;
  - Investigate innovative and flexible professional learning delivery modes such as web based modules and distance learning;
  - Place greater emphasis on building peer support mechanisms and networks for members as an integral aspect of professional learning, including greater use of “special interest” groups and possibly workplace chapters of the Society;
  - Target a component of learning activities to public service middle managers in program areas as a priority; and
  - Investigate the value and feasibility of positioning the AES as the “evaluation professional learning provider of choice” for government, along with the AES as the government-accepted professional learning program accreditation or endorsing body.

## 5.4 Quality Assurance

### Objectives:

- Develop Australasian-specific Professional Practice Standards in one to three years (drawing on the AEA standards as a foundation while taking account of the context and culture of evaluation in Australasia), to encourage consistent, high quality evaluation practice.
- Initiate a process of exploring the merits and consequences of developing and implementing an Evaluator Accreditation Scheme as a part of a broader framework of

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professional guidance, including practice standards, professional ethics and agreed evaluation competencies.

### **Road Map:**

- Develop a Professional Standards Work Plan and establish a Professional Standards Working Group to develop and implement Australasian-specific Professional Evaluation Standards in the short – medium term (one to three years), taking into account work already done by the AES in areas such as the Guidelines for the Ethical Conduct of Evaluations.
- Establish explicit, strategic collaborations with key teaching institutions and government stakeholders, such as the ANAO and state/territory counterparts, to gain their input into the development of the practice standards. (In addition to improving the quality and broad acceptance of the standards, involving academics and government stakeholders in this activity will strengthen linkages and engagement in general between the AES and those sectors.)
- Take account of developments in public administration such as the adoption in some agencies of departmental or program quality frameworks, ensuring that standards developed by AES can appropriately align with these developments.
- Establish a process for investigating evaluator accreditation and provide an initial report to the 2011 AGM.

### **5.5 Advocacy and Influencing**

#### **Objectives:**

- Position the AES as a key source of expertise and advice for governments in Australasia and key public sector agencies in Australia on evaluation policies and approaches that can be used to guide and inform effective, evidenced-informed policy and program development and implementation.
- Establish initiatives and arrangements for partnership and collaboration between the AES and national and state/territory governments to support and promote good evaluation practice and the development, implementation and monitoring of evaluation activities.
- Actively encourage and support governments to consider resourcing evaluation during the developmental phase of programs.
- Place more emphasis in the AES work plan on advocating for evaluation.

#### **Road Map:**

- Develop a 10 year Government Engagement Strategy, identifying short, medium and long term objectives and activities for the Society:
  - building on and achieving greater leverage from existing evaluation innovation and better practice activities such as the AES Evaluation Awards, conferences and Journal;
  - targeting key individual decision-makers such as the Prime Ministers of New Zealand and Australia and state Premiers and their advisors who have a particular

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- interest in ‘evidence-informed policy’ (in the same way that the US counterpart AEA has approached the US President’s office);
- strengthening the positive reputation of the AES through targeted advocacy in high profile policy areas;
- investigating the value and feasibility of generating and supporting an Evaluation Champions Program and AES chapters at the local level in agencies;
- pursuing engagement with heads of evaluation units within government departments;
- targeting key government agencies (such as the ANAO and state/territory audit agencies, and central agencies) to
  - open formal and informal dialogue seeking their input into the development of AES strategies, guidance, resources and professional learning programs to ensure value and relevance to the government sector, and
  - build a relationship where AES is acknowledged as the key external expert advisory body to government on evaluation across Australasia; and
- tailoring key messages about evaluation to contemporary themes in public policy and administration (such as ‘evidence-informed policy’ and ‘learning organisations’).
- Assess the structural, capacity and resource requirements of maintaining a prominent advocacy and influencing role for the AES and enhance the function in a realistic fashion over the short to medium term.

## 5.6 Indigenous Evaluation

### Objectives:

The AES is committed to improving evaluation practice that affects the Aboriginal and Torres Strait Islander peoples of Australia and Maori and Pacific peoples of New Zealand. As a body representing sound theory and practice in evaluation, the AES promotes evaluation that supports positive outcomes and is respectful and appropriate. Accordingly the objective is:

- Work closely with Aboriginal and Torres Strait Islander, Maori and Pacific peoples to:
  - promote sound, respectful and appropriate practice of evaluation;
  - engage Aboriginal and Torres Strait Islander, Maori and Pacific peoples in evaluation practice;
  - enhance ethical evaluation processes; and
  - strengthen the evaluation capacity of Aboriginal and Torres Strait Islander, Maori and Pacific peoples.

### Road Map:

- Maintain a strategic focus on Indigenous evaluation in the short, medium and long-term, with a 10 year Indigenous Evaluation Strategy that continues to address the priorities of:
  - consolidating work already underway in the Indigenous evaluation field;

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- increasing Indigenous participation in AES;
- encouraging the incorporation of Indigenous knowledge and understandings into evaluation;
- encouraging the engagement of non-Indigenous evaluators with the evaluation of Indigenous programs and policies; and
- communicating with ANZEA to learn from its experience in the field of Indigenous evaluation.

## 5.7 Relationship with ANZEA

### Objectives:

- Develop strong working relationship with the Aotearoa New Zealand Evaluation Association, for shared learning.

### Road Map:

- Liaise with ANZEA to establish potential areas for collaboration.
- Create opportunities for Aboriginal, Torres Strait Islander, Maori and Pacific peoples to engage in shared evaluation learning.

## 5.8 International Evaluation Capacity Development in the Asia-Pacific Region

### Objectives:

The AES is committed to supporting the development of evaluation capacity in the Asia-Pacific region. Accordingly, the objective is:

- Position the AES as a resource for both individual practitioners and emerging national evaluation associations in the Asia-Pacific, applying the following principles:
  - capacity development should be based on a self-help model whereby interventions are demand-led and country-owned (that is, any activities need to be in response to identified needs and informed by knowledge from people with experience in and an in-depth understanding of the particular country);
  - capacity development activities are best designed so as to have a systemic focus and an enduring impact; and
  - partnerships with relevant national and international organizations will be the foundation of the AES's approach.

### Road Map

- Establish Consultation Strategy and liaise with PNG personnel interested in M&E to further identify their needs and how the AES can respond and support.

- Liaise with AusAID and NZAID to establish potential areas for collaboration in both PNG and other countries in the Asia-Pacific region.

### 5.9 Engaging the Non-Government Sector

#### Objectives:

- Support the development of evaluation capacity in the non-government sector, recognising the great diversity in the size and resources of organisations required to conduct evaluation as part of their contracts with government agencies.

#### Road Map:

- Develop a five year Non-Government Sector Engagement Strategy that focuses on:
  - recruitment of membership in the non-government sector;
  - identification of the short, medium and long term needs of the sector in terms of evaluation; and
  - activity that strategically targets high level evaluation needs of the sector and positions AES to provide sustainable, longer term support to this segment of membership.

### 5.10 Engaging Academic Institutions

#### Objectives:

- Improve the flow of information about theoretical and practical innovations in evaluation from academic institutions to the AES membership.
- Contribute to academic research in the evaluation field.
- Promote the discipline of evaluation and good evaluation practice in the higher education teaching environment.
- Strengthen the AES's credentials as an expert organisation in the field.

#### Road Map:

- Develop a five year Higher Education Engagement Strategy that focuses on building stronger formal and informal linkages between the AES and academic centres for evaluation, public policy, public administration, community development, international development and other fields where the discipline of evaluation has strong relevance.