



# 2022–2023

## **Annual report**



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### **OUR VISION**

Quality evaluation that makes a difference



### **OUR MISSION**

To strengthen and promote evaluation practice, theory and use



### **OUR VALUES**

Our Code of Ethics guides the activities and behaviour of our members. In essence the guiding principle is:

When commissioning, conducting or reporting an evaluation, members should strive to uphold the ethical principles and associated procedures endorsed by the AES in the Guidelines for the Ethical Conduct of Evaluations.

# President's report

**Poipoia te kākano, kia puāwai**  
**Nurture the seed and it will grow**

*Tēnā koutou, wunya, greetings everyone*

Firstly I acknowledge the Traditional Custodians of all of the lands on which we AES members live and work. For me, the Gubbi Gubbi/Kabi Kabi people express their stewardship and responsibilities as they care for Country where I live. I pay my respects to Elders past and present across this mighty land, for they hold the memories, the traditions, the culture and the hope of Aboriginal and Torres Strait Islander Peoples across this great nation.

We acknowledge that for many Aboriginal and Torres Strait Islander Peoples, this year – and particularly the period leading up to the referendum for the Voice to Parliament – has been especially challenging. The AES Board was proud to say 'Yes' and support the Voice to Parliament as a positive step in empowering First Nations Australians to have their say to government on the policies and decisions that affect them, including how they are evaluated.

In 2022 we relished the opportunity to reconnect with evaluation colleagues face-to-face at the aes22 International Evaluation Conference in Adelaide. The 2022 conference received such high attendance, it demonstrated to the Board how important these in-person gatherings are. Conferences provide opportunities to network, share, showcase and learn. The COVID-19 pandemic has provided reflections, lessons and adaptations for the AES, including the move to an online professional learning program (seminars, workshops and special events) with participant numbers higher than ever.

An enormous amount of progress continues to have been made across our association this past year. This brief update doesn't capture all of the happenings, however your contribution as an AES member or ally is valued and does enable us to provide rich opportunities to the membership.

The four strategic domains had much activity during 2022–2023.



AES President Kiri Parata with newly inducted Fellow Sharon Clarke at aes22 in Adelaide

## Vitality

- The adoption and launch of the AES Diversity and Inclusion Strategy which can be found in the Resources section of the [AES website](#).
- A wide range of online service offerings being made available through the [AES Professional Learning Program](#) with increasing numbers of emerging and skilled evaluators participating in professional development opportunities.
- AES financial health remains strong and membership numbers constant.
- Special Interest Groups (SIGs) continue to play a pivotal role: the Design and Evaluation SIG held lunchtime learnings with Eval ThinkTank attracting 100 people; the Systems Evaluation SIG held a range of engaging discussions throughout the year; and the Multicultural Evaluation SIG held several events, including an online session titled 'A new paradigm for LGBTQ+ evaluation'. With over 1,300 SIG members participating directly in a SIG or through SIG related activities throughout the past year, we are grateful for this energy and knowledge being harnessed within the evaluation community.



Weaving baskets with Auntie Ellen Trevorrow and colleagues

- Eight regional networks continue to actively provide both online and hybrid networking and seminar events in the regions (including in WA during March 2023), a seminar reflecting on aes22 and planning ideas for aes23. In June the ACT (Canberra) Regional Network held a networking breakfast with a panel discussion on the newly established Australian Centre for Evaluation.

### Cultural capacity

- Previous success of the Indigenous conference support program resulted in the largest number of scholarship grant applications received. 17 recipients attended the Adelaide conference.
- AES First Nations Cultural Safety Framework workshops are firmly part of our professional development offerings.
- AES is proud to draw on the knowledge and networks of a large group of Indigenous members from within Australia and the wider

South Pacific region, who participate and advise through the Indigenous Culture and Diversity Committee.

- AES is attaining and embedding cultural safety through its commitment to reconciliation as we explore best practice in showing leadership and our responsibilities to reconciliation.

### Pathways

- Nearly 300 self-assessments have been completed under the Evaluator Competency Framework, following further testing and refinement of the framework and the tool during 2022.
- The online group mentoring program continues to thrive following two evaluations and subsequent adaptations. Mentors and mentees are experiencing personal growth and fulfilment as participants.
- A review and gap analysis led to over a dozen new workshops being added to the AES Professional Learning Program.
- The *Evaluation Journal of Australasia (EJA)* has consolidated and embedded changes that arose from the strategic review. Performance metrics for readership is stable and downloads are increasing. The editorial team has been strengthened with new expertise coming on board.
- The EJA Editorial Advisory Board now consists of 21 members (with representation from Australia, Aotearoa New Zealand, the United States and the United Kingdom).

- In 2022, the AES inducted two new Fellows, Amohia Boulton and Sharon Clarke. This brings the total number of Fellows to 27. Three Fellows currently participate in the online mentoring program.
- The AES blog ([www.aes.asn.au/aes-blog](http://www.aes.asn.au/aes-blog)) is a repository of 17 interviews with Fellows.
- The Awards and Recognition Working Group has continued to engage in the assessment and promotion of excellent practice, and in 2022 identified six awardees.

### Relationships

- A focus for this year has been the delivery of the State of Evaluation in Australia report in March 2023. The study examined the volume, practice and drivers of evaluation across Australia. The snapshot has been timely as the government has announced the establishment of the Australian Centre for Evaluation.
- The AES is interested in supporting the exploration of an Australian First Nations evaluation body. Early discussions are occurring.
- Cross-Tasman relationships with Aotearoa New Zealand Evaluation Association (ANZEA), Mā Te Rae Māori Evaluation Society and the Pasifika Fono continue through conference attendances and mutual conversations.
- Kwadwo Adusei-Asante is the South Pacific regional representative to the International Organisation for Co-operation in Evaluation (IOCE) Board.

- AES continues to stay abreast of major shifts in the evaluation sector and has formed various strategic relationships to promote evaluation.

During my two-year term as President I have enjoyed working with such a committed bunch of people on the AES Board. The AES leadership team comprises our highly competent Chief Executive Officer, Bill Wallace and our Membership and Events Officer, Fiona Zlotnik. I wish to publicly thank Bill, Fiona and Board members for their ongoing commitment to the AES.

As the proverb at the beginning of this report suggests, if we nurture the seed it will grow and thrive. As I reflect on the accomplishments of the AES over the past year, we witness several examples of this in practice. The collective sharing of knowledge and expertise across a wide range of activities speak volumes about the commitment of AES members. The dedication and engagement from members results in a community of evaluators contributing to the strategic direction of the organisation. It is pleasing to have opportunities where members can see themselves directly imparting their skills. This leads to a highly functioning operation. Ngā mihi ki a koutou katoa. Thanks one and all.

We look forward to embarking on a comprehensive strategic planning consultation process in the near future with AES members. Your contributions will shape the focus and direction of the AES for the next few years.

Mauri ora, wishing you wellness and possibilities in the coming year.

**Kiri Parata**  
President

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# Treasurer's report

## Introduction

I am pleased to share that the AES has achieved a profit in the 2022–2023 financial year. The organisation has been working towards a return to post-Covid 'normal' and held its first face-to-face annual conference after a two-year pause. Based on a strong balance sheet and the ability to continue operating profitable activities, the directors have concluded that the going concern basis of accounting is appropriate for the organisation. We are confident that we can continue to operate and provide services sustainably.

## Summary of the 2022–2023 results

Overall, operating profit for 2022–2023 was \$82,956. This was \$60,023 more than budget (\$22,933) and \$125,815 higher than in 2021–2022. The better than expected surplus was largely achieved through a combination of higher operating income, excluding conference income (+\$19,270 against budget) and lower than anticipated operating expenditure, excluding conference income (-\$39,433 against budget).

The operational income was a result of higher than forecast membership and workshop revenue (+\$11,585 and +\$15,418 respectively), partially offset by lower job advertising income (-\$5,600).

Operational expenses were less than budgeted due to \$37,000 of the strategic project fund remaining unspent (against a budget of \$40,000): other than the \$3,000 disbursed for the completion of the State of Evaluation report, no new special projects were identified in 2023. This was in part due to changed priorities of some committees as well as being in the end phase of the current strategic plan with most planned activities completed. In addition, \$6,903 less was spent on membership activities (mentoring program and regional activities), and \$14,316 less on administration.

At 30 June 2023 the AES had 1,149 members – slightly less than the previous year (1,155), but more than before the pandemic (1,043 in 2019). Due to a change in membership software in March, there are minor differences in the way membership data is recorded and therefore comparisons between years should be made with caution.

Pleasingly, in 2023–2023 membership fee income of \$231,585 was almost the same as the previous year and 5% higher than budgeted.

The virtual workshop program made a profit of \$129,321. This was higher than budgeted (+\$19,321) and up from \$117,000 in the previous year. There was concern that the profitability of the workshops may not be sustainable following COVID-19. However, a review of the program identified program gaps which we were able to fill with new topics during the year. The events registration and invoicing systems were also upgraded with an improvement in efficiency.

This year marked a return to face-to-face conferences after a two-year pause. The conference achieved a surplus of \$171,185, which was an increase of \$1,312 against the budget of \$169,873. It should be noted that with the large increase in conference related expenses, surpluses of this magnitude will be difficult to achieve in future. Reliance on conference income is slightly lower than in 2019 when we held the annual conference in Sydney, indicating the increasing value of the workshop program to the financial sustainability of the AES.

## Profit and loss budget – our position against budget:

Operating income (excluding conference income) of \$512,280 is 4% (+\$19,270) higher than budget. Operating expenditure (excluding conference income) of \$600,517 was 6% (-\$39,433) lower than budget, mainly due to unspent funds and decreased governance and administration expenses. Administration expenses were 4% lower than budgeted, although software was 64% over budget due to procuring new website and IT systems and support. The Adelaide conference returned a surplus of \$171,185 (against a budgeted surplus of \$169,873). The overall profit of \$82,956 was 262% (+\$60,022) higher than the budgeted surplus of \$22,933.

## Profit and loss – our position compared to last year:

Operating income (excluding conference income) of \$512,287 was \$3,829 greater than at 30 June 2022. Operating expenditure (excluding conference income) increased by 8% on last year, due to increased expenditure on

publications, Board meetings and administration. The workshop surplus of \$129,321 is up from \$123,528 the previous year. Virtual workshop profitability is 50%, the same as in the previous year. No conference was held in the previous year. Overall profit increased year on year by \$125,815.

#### **Balance sheet analysis June 2023 against June 2022**

Cash balance has increased by \$87,483 (+14%) since last year. We are holding venue deposits on the balance sheet for a total of \$103,885 (2023 Brisbane – \$88,196; 2024 Melbourne – \$15,688). Total assets have increased by 1%.

Total liabilities have decreased by 15%, as we are holding less unearned conference registration (-\$32,796) and less unearned membership income (-\$25,866). The decrease in unearned membership income is related to changes in the renewal method of organisational memberships. Previously, all organisational memberships were due on 1 July and invoiced in the accounting system on 1 June and recorded as debtors. The invoiced amount was transferred to the balance sheet and realised on 1 July. The new system handles organisational renewals in the same manner as individual memberships: organisational memberships due on 1 July and renewed during June are now placed on the balance sheet and realised on 1 July.

Total equity (members' funds) has increased by 16% (+\$82,956) from \$520,355 at 30 June 2022 to \$603,311 in the current year.

#### **Financial comparison over six years**

The comparison of profit/loss position over six years (see page 42 of this report) shows that the financial year ending June 2023 has returned a net positive profit after two years of operating without an annual conference. The financial years ending June 2020 and June 2021 resulted in a positive position only due to receiving government assistance – without this support, these years would have resulted in a loss or close to a loss. In the year ending 30 June 2022, the lack of conference income and government assistance resulted in a loss.

The Board has monitored the finances of the AES very closely over this period, and with reduced spending and increased profitability of workshops through virtual offerings, the organisation has managed to limit the losses, and has recovered well to a pre-Covid position in 2023.

The Board is confident that the AES can continue operations sustainably and believes that we can confidently commence the strategy planning process in the coming year – being assured of financial security.

#### **Looking forward**

In 2024 we have budgeted for a modest profit of \$3,580. We intend to continue investing in the future of the AES through developing the next iteration of our Reconciliation Action Plan, developing a new strategic plan and investing in new strategic projects. We will continue to provide member services, such as funding the group mentoring program, supporting the regions to provide face-to-face social events and funding the administration of the Indigenous Cultural and Diversity Committee. At the same time we need to continue to fund the administrative functions through accounting for two paid operational positions and the EJA Managing Editor position.

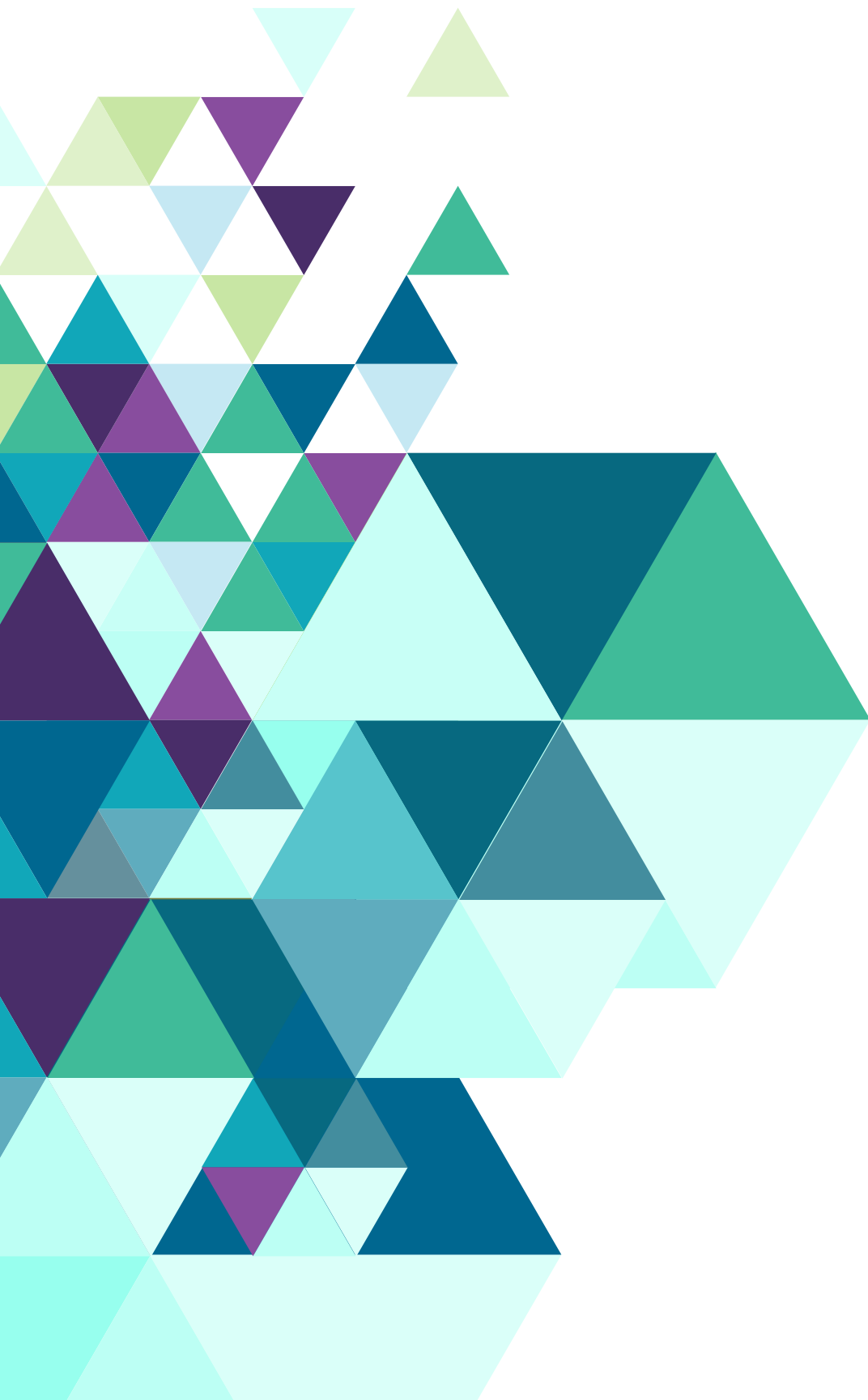
Revenue will be generated through the annual conference in Brisbane where we have budgeted for 420 delegates, as well as through the workshop program and membership fees. Australia-wide, organisations have experienced increasing costs in service delivery over the past year, making it more difficult to balance the budget. Therefore, we made the decision to increase membership fees by 10% in 2024. We believe this is a modest increase given that we have not had an increase since July 2019, while at the same time carrying higher costs of occupancy, conference expenses and ensuring staff salaries are market competitive. In addition, in 2024 the Board will consider increasing the number of paid staff to include a Policy Officer and additional administration support – dependant on the financial result of the Brisbane conference and assurance that the AES can remain sustainable over the future years.

**Carina Calzoni**  
Treasurer



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# ABOUT US



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# Who we are

The Australian Evaluation Society (AES) is a professional organisation for people involved in evaluation, including evaluation practitioners, managers, teachers and students of evaluation, and other interested individuals.

We have over 1,000 members involved in all aspects of evaluation and performance measurement. The AES is governed by a Board of Directors and managed by a Chief Executive Officer and staff.

Our members represent diverse professional sectors and areas of evaluation practice and meet regularly through regional networks, Special Interest Groups, discussion groups and an annual conference.

The AES offers professional development through an annual international conference, a peer-reviewed evaluation journal, and regular workshops and seminars.

## Objects of the AES

- Establish and promote ethics and standards in evaluation practice
- Encourage advances in the theory and practice of evaluation
- Provide education and training related to evaluation
- Provide forums for networking, professional development and the discussion of ideas
- Increase understanding of evaluation and advocate for quality evaluation
- Be inclusive of Indigenous and all cultural perspectives
- Have governance systems that reflect and incorporate best practice
- Provide a forum that allows the diverse voices of the community to be heard, including those who commission the evaluations, those who carry them out and the evaluands
- Undertake other activities consistent with these aims.

# Member benefits



## Recognition and support

Belonging to the longest established professional evaluation organisation in the region, with a network of over 1,000 practitioners, commissioners and academics involved in all aspects of evaluative enquiry and performance measurement.



## Code of ethics

Members abide by the AES Code of Ethics, and are guided by and support the AES Guidelines for the Ethical Conduct of Evaluations.

Members are encouraged to rely on the Code when faced with situations that require them to balance competing ethical principles.



## Professional learning opportunities

Opportunities are available to learn from leading local and international expert evaluators through the annual conference and professional learning activities. Members keep up-to-date through AES publications, workshops, seminars, discussion groups and conferences.



## Networking

Members make contacts with colleagues in evaluation by joining in regional group meetings and other activities for training, networking and discussion of current evaluation topics.



## Publications

Online, member-only access to the *Evaluation Journal of Australasia* (EJA) and six SAGE Publishing titles, and the AES Guidelines for the Ethical Conduct of Evaluations.



## Members' centre

Electronic access to information and resources for members only, including the latest issue of EJA, issues of e-news, and access to the Directory of AES Members.



## AES Awards for Excellence in Evaluation

Members are eligible for nomination for the prestigious AES Awards for Excellence in Evaluation.



## Consultants' Directory

Members profile their evaluation services and consultancy through the online Consultants' Directory and receive tender information made available to the AES.



## Annual international evaluation conference

Evaluators stay in touch with the latest trends and issues in evaluation through the annual AES International Evaluation Conference, for which members receive advance notice and discounted registration fees.



## International links

Members are part of an international network of evaluation societies.

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# Corporate governance

## How we are governed

The Australian Evaluation Society is a charity registered with the Australian Charities and Not-for-profits Commission (ACNC). Since May 2015, the association has been a public company limited by guarantee after it transferred its registration as an association from the Australian Capital Territory. A Board of Directors provides overall governance and strategic direction for the organisation. The Board is legally responsible for governing the organisation. The Chief Executive Officer manages operations and has delegated responsibility for implementing the directions and decisions of the Board.

## Accountability of the Board

The Board is accountable to the membership of the AES. All members of the Board must adhere to the requirements of the ACNC and the *Australian Corporations Act 2001*, as well as the provisions set out in the AES Constitution and policies.

## Appointment of the Board

Following adoption of the new Constitution at the Special General Meeting in February 2015 and subsequent re-incorporation from the 2015 Annual General Meeting, the Board consists of three named office bearers (President, Vice President and Treasurer) and three ordinary Board members, all elected by the membership. The Board has the discretion to appoint up to three ordinary Board members, ensuring that at least two members of the Board are First Nations people and taking into account the overall mix of knowledge, skills and attributes of Board members.

## Role of the Board

The Board is subject to the provisions of the *Australian Corporations Act 2001*, its obligations to the ACNC and the AES Constitution. The Board may delegate certain powers to committees of members. All Board positions are unpaid.

## Indemnity of the Board

The AES has directors' and officers' insurance and professional indemnity for all Board members.

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# Board and staff

## Board members 2022–2023

### President

Kiri Parata

### Vice-President

Anne Stephens

### Treasurer

Carina Calzoni

### Ordinary Board members

Eleanor Williams (to March 2023)

Doyen Radcliffe (to September 2022)

Charlie Tulloch (to September 2022)

Nicole Tujague

Tony Kiessler (from September 2022)

Jade Maloney (from April 2023)

### Meeting attendance

Kiri Parata	6 of 6
Carina Calzoni	5 of 5
Anne Stephens	4 of 5
Eleanor Williams	3 of 3
Charlie Tulloch	0 of 1
Doyen Radcliffe	0 of 1
Nicole Tujague	6 of 6
Tony Kiessler	5 of 5
Jade Maloney	2 of 2

### Staff

#### Chief Executive Officer

Bill Wallace

#### Membership and Events Officer

Fiona Zlotnik

## President: Kiri Parata

Kiri's iwi (tribal) affiliations are Te Ātiawa ki Waikanae, Ngāti Toarangatira, Ngāti Raukawa, Ngāti Ruanui and Ngāi Tahu. Kiri's heritage is NZ Māori.

As an Indigenous evaluator and Māori health researcher, Kiri attributes her strengths to the mentoring and leadership she has received over the years from a number of dedicated Indigenous leaders.

Her career began working at a grassroots level through improving health services for Māori and marginalised communities. When the service Kiri managed was evaluated in 2004, her interest in evaluation was sparked.

Kiri's professional roles have included project management, Indigenous health research and evaluation and relationship management. Kiri is currently a PhD candidate with Massey University, New Zealand, investigating ancestral values, relationships with whenua (land) and wellbeing implications.

Since 2017 Kiri has been privileged to serve as an ordinary Board member initially, a member of the AES Indigenous Culture and Diversity Committee, Vice President from 2020 until being elected President in September 2021. During this time Kiri has supported the Board's strategic commitment to strengthen and build Indigenous capacity in the evaluation sector.

Two significant Board achievements during this period have been the development of the Reconciliation Action Plan and the Cultural Safety Framework. Kiri brings a sound and strategic approach to her roles and draws on her community development background and her commitment to social justice in her work.

Kiri lives with her whānau (family) on Gubbi Gubbi Country on the beautiful Sunshine Coast, Queensland. The majority of her work takes her back to Aotearoa New Zealand.

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### **Vice-President: Anne Stephens**

Anne Stephens, (PhD, MBA) specialises in social evaluation and research. Anne has worked in senior positions with the Queensland and Victorian governments, as well as for Australian and International NGOs in evaluation consultancy.

Anne is a sociologist and her social and theoretical work has been used in community and government for family violence prevention; adult and infant head trauma prevention; Aboriginal and Torres Strait Islander vocational training for workforce development; and substance use harm reduction and treatment.

Anne is the author of *UN Women's Inclusive Systemic Evaluation for Gender Equality, Environments and Marginalized Voices (ISE4GEMs): A New Approach for the SDG Era* (2018) and over 50 journal articles, evaluation reports and conference papers.

She is an Adjunct Senior Researcher at James Cook University, an Endeavour Research Fellow and was a Visiting Scholar at Columbia University's School of International and Public Affairs (New York) in 2016.

### **Treasurer: Carina Calzoni**

Carina is Managing Director at Clear Horizon, a medium sized company specialising in measurement, evaluation and learning. She has a diverse educational background with a Masters of Evaluation; post graduate qualifications in Public Policy and Environmental Science; and a degree in Applied Science. She has 20 years of professional evaluation experience, working in government as well as in consulting and has held senior management and leadership roles during this time.

Her evaluation experiences include large scale and complex mixed-methods evaluations as well as designing high-level measurement and evaluation frameworks. Through these experiences she has developed an in-depth understanding of policy and program design and implementation. She is a strong advocate for participatory approaches that foster organisational learning and positive social change and is passionate about helping organisations see the real value of good measurement and evaluation practice.

Since 1999 Carina has been an active member of the AES. She served as the WA's regional representative for ten years, delivering and facilitating regional seminars, and in 2016 she convened the successful AES International Conference in Perth. She has also delivered many AES professional learning workshops.

Through her various roles Carina has demonstrated skills in leadership and governance. To complement her practical skills, Carina completed the Foundations of Directorship with the Australian Institute of Company Directors (including subjects in governance, finance, strategy and risk). Since 2019 Carina has enjoyed the privilege of being the Treasurer on the current AES Board. This has involved actively upholding the organisation's financial sustainability, including two challenging years resulting from the disruptions caused by the COVID-19 pandemic. She brings to this role a solid knowledge of the evaluation industry as well as experience in directorship.

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# THE YEAR'S HIGHLIGHTS



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# AES International Evaluation Conference

## Weaving evaluation into the whole

The 2022 AES International Evaluation Conference was held from 28 August to 1 September 2022 at the Adelaide Convention Centre on Kaurna Yorta (land of the Kaurna people of the Adelaide Plains). As the first in-person conference in three years, the turnout was the highest in the AES conference history, with 529 conference participants from across Australia, New Zealand, and internationally. 13 pre-conference workshops were delivered, attended by 305 delegates.

### The conference theme

The Conference Committee had a simple vision and theme for aes22. Our aim was to demonstrate and facilitate evaluation as an instrument of change that embraces and empowers the diversity of stakeholders. Our theme, *Weaving evaluation into the whole*, was delivered through four key messages namely, evaluation is for all stakeholders, evaluation must embrace multiple perspectives, evaluation must leverage good practice, and evaluation must embrace new ideas. These four key messages were the basis for the conference subthemes: 'Evaluation for all', 'Weaving perspectives', 'New ways of weaving', and 'Materials, patterns and practices'.

The weaving metaphor was adopted because of its cultural importance and connection with the First Nations people around the world, including those of the Kaurna Yorta. It illustrated that effective evaluation is a product of sound structure, having a clear purpose and using proven methods, while ultimately being developed with and valued by the community.

### The conference

Two days of pre-conference workshops provided opportunities for focused learning, skill development and networking. The delivery and presentation of the AES First Nations Cultural Safety Framework was well received.

During the conference opening, delegates were welcomed to Kaurna Yorta by Uncle Frank Wangutya Wanganeen, a Kaurna/Nurungga man originally from Point Pearce Mission on the Yorke Peninsula of South Australia.

Uncle Frank also hosted three Kaurna walking tours offered to conference delegates. These tours of the Karrawirra Parri (River Torrens) precinct showcasing places of historical and cultural significance for Kaurna Peoples were well attended.

For the first time, a First Nations room was made available in partnership with Kowa – providing a dedicated space for First Nations people to gather and connect.

We were also pleased to have a real-life illustration of the conference theme with a weaving demonstration by Ngarrindjeri Weaving and Auntie Ellen Trevorrow. Materials were provided for delegates to sit with Auntie Ellen and create personal weavings.

There was a great response to the theme with people embracing the concept of weaving in their abstract submissions and conference presentations. Delegates were quite active on Twitter this year (#aes22ADL) and we had the privilege of hosting the @WePublicHealth handle (owned by Croakey Health Media) during the conference.

In addition to an overarching conference theme and subthemes, each day had a specific focus: Community, Government and Evaluation skills. It was our hope that these focused days would enable and support connections with evaluation for different stakeholders, specifically community and government groups. The messages from the keynote speakers touched upon one or more aspects of our subthemes. The themes and subthemes were also activated through the two plenary panels: one focused on evaluation from a community perspective, and the other from a government perspective.

The first day of the conference was our Community day. Keynote speaker Nan Wehipeihana, Director of Weaving Insights and member of the Kinnect Group, spoke on 'Evaluation in pursuit of Indigenous health equity. Weaving courage, evidence and evaluative insights in a funder-commissioned evaluation'.

It was felt that Nan 'demonstrated how equity considerations can be built into evaluations intent and design' (Twitter). She also shared how 'the value of our knowledge has a different currency when it's in our hands. Our data loses currency when it moves out of our hands – Darren Clinch paraphrased'. (Twitter)

The program for the day included presentations about community-based programs, community-led evaluations and culturally-based methods. It closed with a panel discussion on the topic of 'Storytelling for systems change at community level, insights from the field'. The community panel had a mix of community advocates and evaluation experts who illustrated the importance of community empowerment in evaluation. Facilitator Thea Snow provided the following quote from *The Tyranny of Metrics* by Stefan Collini on how we can ensure stories are used in a way to help evaluators get to 'the truth' ... 'We appeal to numbers as a way of replacing imprecise, subjective human judgment with precise, objective measurement, but in fact, we are just swapping one language system for another'. (Twitter)

Day two was our Government day. Katina D'Onise, Executive Director of the Prevention and Population Health Directorate in Wellbeing South Australia, spoke on 'Public health challenges and evaluative thinking: rapid responses in the time of COVID-19'. She asked us, 'What can we learn from the corporate world and *The Lean Startup* by Eric Ries – 1. *VISION and learning as we go*. 2. *BUILD MEASURE LEARN and a minimum viable product*. 3. *SCALE and context*.' (Twitter)

The program for the day included presentations from different government organisations and conversations about evaluation in the public sector. The government panel at the close of the day was titled 'Weaving evaluation in policy and program development'. It comprised of senior representatives responsible for embedding evaluation within their respective sectors and gave insights into progress they have made and the challenges that remain for evaluation to be part of the everyday cycle of government decision-making.

Day three of the conference focused on the evaluation profession and being evaluators. Associate Professor Amy Gullickson's address was titled 'Soul and maturity: on being evaluators'. We had a stick-figure talk about 'frenzied piranhas' and managing the loop of

**We would like to thank independent evaluator Wan Yi Lee for leading the aes22 conference evaluation, with support from Emily Saurman in scoping, and interview and survey design.**

reactive data collection driven by anxiety. The program for the day had a stronger focus on methods, methodologies and the practice of evaluation. The closing session, 'Unfolding the conference tapestry', was a group reflection facilitated by Vanessa Hood and Duncan Rintoul. The engaged participation among delegates during the session at the end of the conference demonstrated the importance of having multiple voices in evaluation. Vanessa and Duncan challenged the crowd to consider 'what is sitting with you and feels important from the conference ... and what are you going to do about it?' One reflection from Twitter was that it was about 'making values real and how these get woven into practice. #respect #empowerment Have tools Can share with colleagues! #evaluation is a tool for #equity and practice. Become a noisy ally!' (Twitter).

#### Next year

As per tradition, the conference owl was passed on (for a second time!) to the Brisbane aes23 Conference Committee with best wishes for September 2023.

#### Sponsors

We would like to acknowledge the generous support of our 2022 sponsors.

Platinum sponsor: ARTD Consultants

Gold sponsors: Allen+Clarke Consulting, Australian Healthcare Associates

Silver sponsors: Urbis, Acil Allen, Clear Horizon

Bronze sponsors: Wellbeing SA, Australian Volunteers (Australian Aid)

#### Conference Committee

Sharon Clarke  
Iordan Kostadinov  
John Pila (Conference Convenor)  
Katherine Pontifex (Conference Co-program Chair)  
Emily Saurman (Conference Co-program Chair)  
Jessica Stevens  
Patricia von Baumgarten  
Bill Wallace (Conference Director)  
Fiona Zlotnik (Conference Manager)

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# Evaluation Journal of Australasia (EJA)

Over the past year the *Evaluation Journal of Australasia* has consolidated and embedded changes that arose from the strategic review. Journal editorial and management processes are functioning well.

## Content

The publication schedule of the EJA has been successfully maintained with all issues produced on time. Four issues of the journal were published in 2022–2023 consisting of 13 articles on a broad range of topics. Each issue comprised at least three articles, as well as an editorial, evaluator's perspective and a book review. One of these issues was a special issue (December 2022) which charted the journey of University of Southern Queensland's use of internal evaluation to become a continuous learning organisation.

During the year the submission guidelines were revamped including increasing the word limit for articles. The aim of this is primarily to attract higher quality academic and review articles that are more likely to be cited (and contribute to improving performance metrics). This has led to an increase in the pages published from 226 to 288. Sage have agreed to remove the 240 page budget per volume meaning there is capacity to publish longer and additional manuscripts.

## Performance metrics

The performance metrics for the EJA provided by Sage show that readership of the journal in terms of circulation remains stable. Full-text downloads have however increased considerably year on year (to May 2023: 12,641 downloads; 2022: 22,323; 2021: 19,825).

The EJA currently has a CiteScore of 1.3 (2022) which is a slight increase over previous years (2021: 1.2; 2020: 1.1; 2019: 0.8; 2018: 0.9). The journal is ranked by Scopus as 194/298 in Development and 667/1415 in Sociology/Political Science categories.

## Strengthening the editorial team

The editorial team consists of an Editor, four Associate Editors, a Managing Editor and an Editorial Assistant. Two Associate Editors (Caroline Ladewig and Melissa Forbes) resigned during the year due to work commitments. New Associate Editors appointments have strengthened expertise in health/quantitative evaluation (Professor Yvonne Zurynski, Sydney) and in community development/NGO sectors and within Asia (Ming Hwa Ting, Singapore).

An Editorial Advisory Board consisting of 21 members (with representation from Australia, New Zealand, the United States, and the United Kingdom) has met twice in this period (November 2022 and June 2023) and is making a welcomed and valuable contribution. The discussions are useful for the editorial team as it plans to improve the quality and quantity of submissions. Board members have assisted in undertaking manuscript reviews, promoting the journal, reviewing books, and in submitting manuscripts.

## Looking forward

The editorial team continues to focus on increasing the number of submissions to the journal. As part of this promotion a well-attended session was held at the AES 2022 conference and an online workshop conducted for potential authors. A publicity flyer has been developed. Planning for special issues in early 2024 and in 2025 is underway.

### Editor

John Guenther

### Associate Editors

Anthea Rutter

Kwadwo Adusei-Asante

Ming Hwa Ting

Yvonne Zurynski

### Managing Editor

Jeffery Adams

### Editorial Assistant

Fiona Zlotnik

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# STRATEGIC PRIORITIES

The AES strategic priorities 2019–2022 include four strategic domains: Cultural capacity, Pathways, Vitality and Relationships.

To support the strategy the AES has four strategic advisory committees: Indigenous Culture and Diversity Committee, Pathways Committee, Vitality Committee and Relationships Committee.



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# Indigenous Culture and Diversity Committee

## Indigenous and non-Indigenous capacity in culturally safe evaluation theory, practice and use

It is important to start by recognising the generous contribution of time and expertise given by all Indigenous Culture and Diversity (IC&D) Committee members – with a special mention to Elder Sharon Clarke who has continued to chair the Committee. For many Aboriginal and Torres Strait Islander Peoples this year – and particularly the period leading up to the referendum for the Voice to Parliament – has been especially challenging. We acknowledge this challenge.

The IC&D Committee's goals established in the AES strategic priorities 2019–2022 have been realised on many levels. There are some important opportunities and trends affecting how the Committee will work into the future.

Supporting a strong community of Indigenous evaluators continues to be the focus of the Committee and we welcomed two new members in early 2023. The Committee has met regularly during the 2022–2023 financial year with extra meetings organised when necessary:

- To discuss the process forward for the Reconciliation Action Plan (RAP) – arriving at a point where the refresh will be guided by expert advice, possibly sourced externally from the AES and in consultation with Reconciliation Australia.
- To revise the wording for the Conference Support Grant for Emerging Indigenous Evaluators application form.
- To review the edits for the AES Diversity and Inclusion statement.
- To review the process of recruiting new Committee members.

- To develop the role of the new IC&D Committee administrative support person and recruit for this position.

The IC&D Committee members have continued to support the First Nations Cultural Safety Framework workshops during this year. Some members were able to attend the training, and consequently were called upon to assist facilitators with the hosting role and welcome attendees to workshops.

Continued support for Indigenous evaluators has also remained a focus of the Committee. Early discussions were held with an emerging Indigenous evaluation body, Gilibanga, to establish a mutually beneficial relationship with the AES. Committee Co-chair Nicole Tujague attended a two-day conference held in Dubbo in October 2022 where Gilibanga was launched by Indigenous organisation Kowa.

### *Conference Support Grants for Emerging Indigenous Evaluators*

The Conference Support Grants for Emerging Indigenous Evaluators are awarded each year to new and emerging Indigenous evaluators to attend the AES International Evaluation Conference.

A record 17 participants received grants to attend the 2022 conference in Adelaide.

We would also like to acknowledge and thank the Australian Government National Indigenous Australians Agency for their continuing financial support, as well as delegates who donated to the grants.



CSG working group chair Sharon Clarke (left), AES President Kiri Parata (third from right) and Board member Doyen Radcliffe (right) with the 2022 recipients of the Conference Support Grant for Emerging Indigenous Evaluators

### Looking ahead

As learnings emerge from the First Nations Cultural Safety Framework workshops, the IC&D Committee looks forward to yarning with the workshop facilitators about the ongoing facilitation and development of the framework. The Committee will also continue to discuss the progress of the organisation's RAP. Supporting emerging Indigenous evaluators has always been a priority for the IC&D Committee and with the introduction of new CSG funds from the principal scientific and technical organisation in the Pacific, The Pacific Community ([www.spc.int](http://www.spc.int)), we look forward to planning how new grant recipients can be part of the IC&D Committee's (and AES) activities in various ways.

### Committee members

Sharon Clarke (Co-chair)  
 Kevin Dolman  
 Lea Gage  
 Tony Kiessler  
 Kiri Parata  
 Doyen Radcliffe  
 Melanie Syron  
 Marica Tabualevu  
 Nicole Tujague (Co-chair)  
 Mark Watego  
 Nan Wehipeihana

### Administrative Support

Erin Solomon

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# Pathways Committee

## Clear professional and career pathways

The Pathways Committee continues to deliver and refine a range of high impact projects in alignment with the AES strategic priorities.

The AES online mentoring program continues to evolve and highlight AES members' desire to connect, network and share experiences with fellow evaluators – it will be in its third iteration in 2023–2024. The program provides online cohorts of mentees with guidance from two experienced evaluators in a mentor and associate mentor partnership. Mentees greatly benefit from the mentors' wisdom, support and experience and establish valuable relationships and networks with their peers. Many evaluators often feel isolated in their roles and the opportunity to meet with other evaluators, share their concerns, queries and learnings and expand their knowledge about specific areas of interest is highly valued. Mentors and associate mentors experience personal growth and fulfillment sharing their experience and expertise with mentees. Some mentors have continued in this role repeatedly and some mentees have gone on to become associate mentors. The mentoring program has been evaluated twice and the model has developed accordingly.

The Evaluation Competency Framework and self-assessment tool has been tested with a range of audiences again in 2022, including at the aes22 International Evaluation Conference. Nearly 300 self-assessments have been completed and both the framework and self-assessment tool have been refined according to feedback and data analysis. The results from the self-assessment tool and implications for the Evaluation Competency Framework will be featured in a special edition of EJA in 2023.

Following a review and gap analysis of our workshop program in early 2022, an expression of interest process led to over a

dozen new workshops being added to the AES Professional Learning Program. Eight of these new workshops have been delivered so far and the entire AES online workshop program continues to attract high attendance, with feedback indicating the ongoing appetite for evaluation professional development through online engagement and the increasing focus on developing evaluation thinking and skills across a wide range of sectors.

### *Looking ahead*

In 2023–2024 the AES Pathways Committee will continue running and improving the online mentoring program. The AES Professional Learning Program will be evaluated to better cater to member needs and adapt to evolving evaluation trends. The alignment of the Evaluator Competency Framework and self-assessment tool with the AES Professional Learning Program will be reviewed to help users identify their priorities. The Pathways Committee will also liaise with other committees to provide further support for emerging evaluators, including development of an induction program to familiarise new members with AES services and publications, such as the Code of Conduct and Evaluator Competency Framework.

### *Committee members*

Fran Demetriou  
Julie Elliot  
Amy Gullickson  
Del Lloyd  
David Roberts  
Taimur Siddiqi  
Anne Stephens  
Jill Thomas (Chair)  
David Turner

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# Vitality Committee

## An organisation meeting diverse member needs today and tomorrow

In 2022–2023, the Vitality Committee has continued to bring together all jurisdictions to share activities between State and Territory committees, and to work on key strategic priorities, including an ongoing focus on the following outcomes:

- Gaining a better understanding of members' needs and the issues they face along with the communities they serve
- Enhancing member services and improving the reach across our geographically diverse membership.

During 2022–2023 the Vitality Committee finalised the development of a Diversity and Inclusion Strategy consisting of two components: a high level diversity and inclusion statement; and a membership strategy to ensure that the AES delivers an inclusive association that meets the diverse needs of its members and continues to attract members from a wide range of backgrounds and disciplines. The work continues to be supported by a project working group, co-chaired by Eleanor Williams and Florent Gomez, and including Eva Sarr, Gerard Atkinson, John Pilla, Lucy Walker and Eleanor Kerdo. The Diversity and Inclusion Strategy will be officially launched at this year's AGM.

### Looking ahead

The Vitality Committee will establish a Diversity and Inclusion Strategy working group to embed the policy across the AES. The Committee will also continue to focus on identifying seminar topics of interest across jurisdictions and facilitate multi-jurisdictional events. A key element of the Committee's work will be to contribute to the Board's strategic planning process.

### Committee members

Kim Abbey  
Ruth Aston  
Janet Conte  
Christabelle Darcy  
Florent Gomez  
Kim Grey  
Robert Grimshaw  
Caroline Henwood  
Lisette Kaleveld  
Mark McKay  
Ruth Nicholls  
Marie Nissanka  
Elizabeth Poppelwell  
Alison Reedy  
Sunita Singh  
Bill Wallace (Chair from March 2023)  
Eleanor Williams (Chair until March 2023)

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# Relationships Committee

## Collaboration and partnerships to strengthen the field of evaluation

The Relationship Committee's focus in 2022–2023 was the delivery of the State of Evaluation in Australia, a study into the volume, practice and drivers of evaluation across Australia as well as future directions for the sector. A key motivation for the study was to inform the Committee's efforts to engage with stakeholders, develop policy positions and advocate on issues in line with the AES strategic priorities. Its findings will be helpful for the AES in setting its strategic directions beyond 2023 and in tailoring support for members who work in the evolving field of evaluation. This being the first study of its kind in Australia, it is likely to be repeated periodically.

The project was led by the Committee, drawing on support and input from many AES members, including a dedicated working group. KPMG was engaged to support the work, including undertaking key data collection activities.

Emerging findings were presented at the 2022 AES International Evaluation Conference. The final report was released in March 2023. Working group members participated in several events across the country to share key findings.

Outside this project, the Committee has stayed abreast of major shifts in the evaluation sector and formed various strategic relationships to promote evaluation. For example, a Committee member presented to the Asia Pacific Dialogue on National Evaluation Policies and Systems (NEPS) in December 2022.

### *Looking ahead*

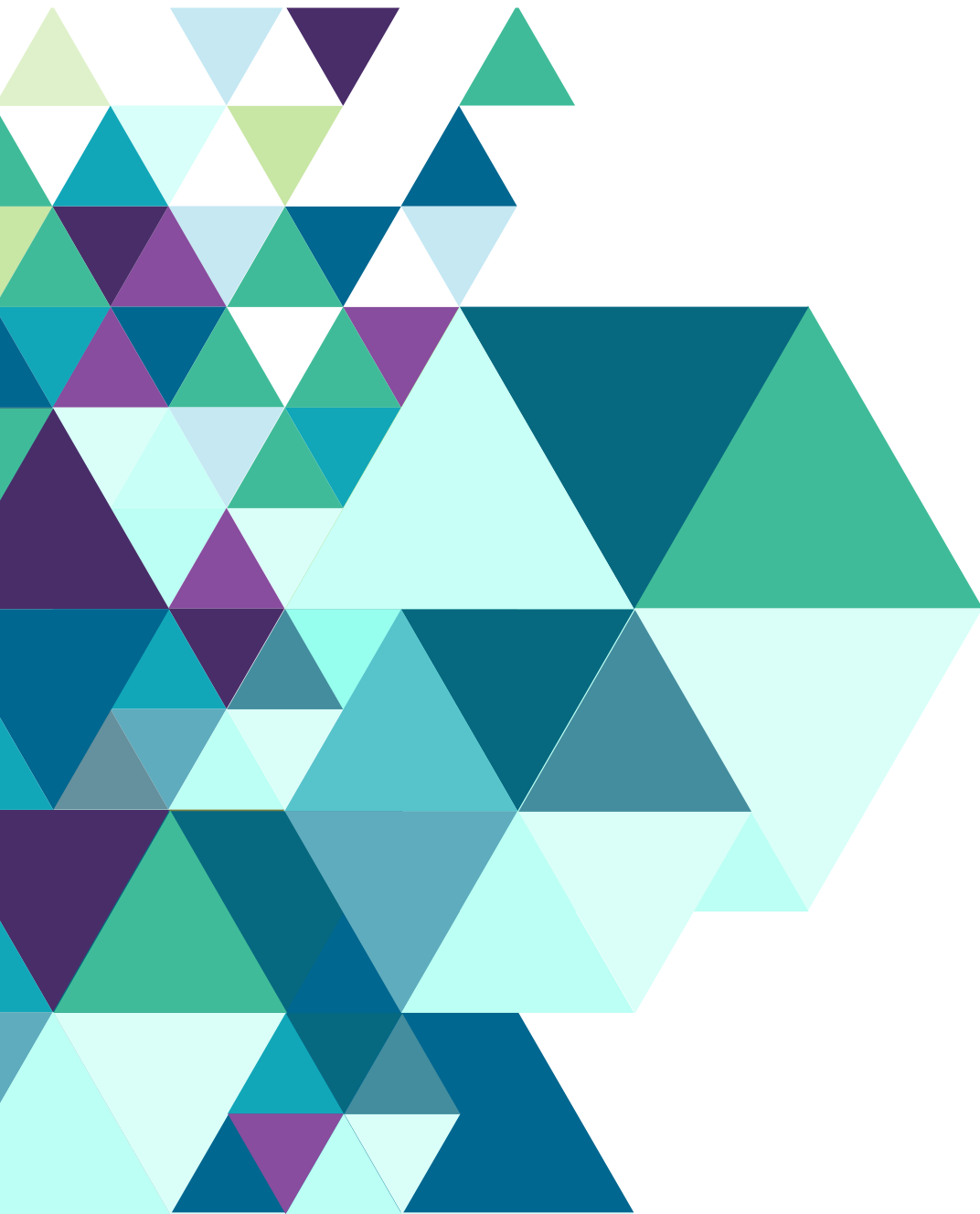
In 2023–2024 the Committee will use the findings of the State of Evaluation in Australia report to engage with government, NGOs, education institutions and other bodies involved in evaluation in Australia. In doing so, the Committee will seek to foster positive, mutually beneficial relationships within and outside the evaluation sector that enhance the standing of the AES and enable it to promote evaluation theory, practice and use.

### *Committee members*

Luke Condon  
Kim Grey  
Becca Hardy  
Jade Maloney  
Tadgh McMahon  
Carlos Rodriguez  
Robert Sale  
Kara Scally-Irvine  
John Stoney  
Elliott Tester  
Charlie Tulloch

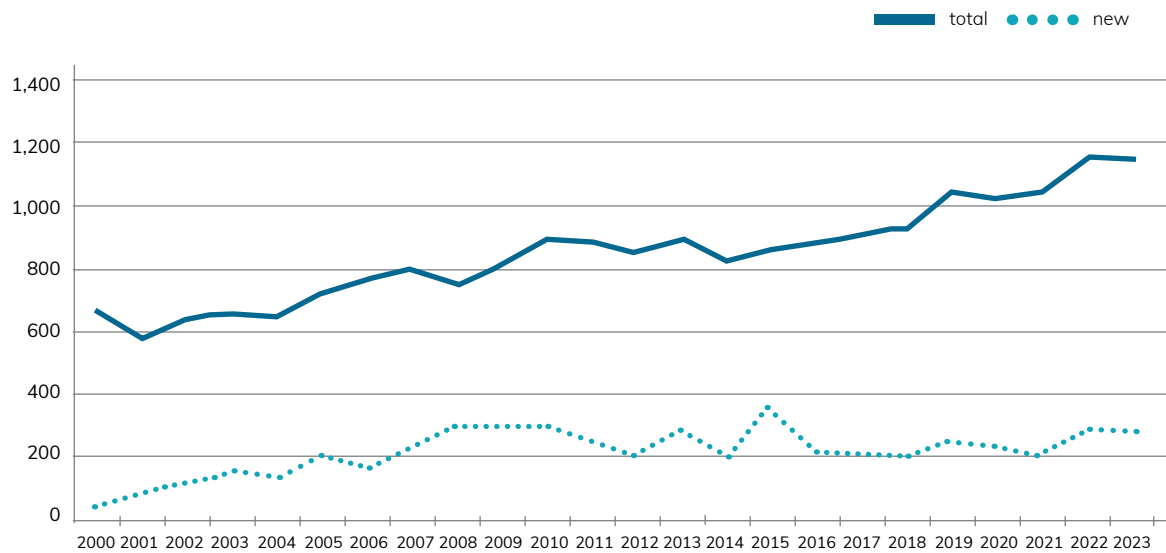
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# MEMBER NETWORKS

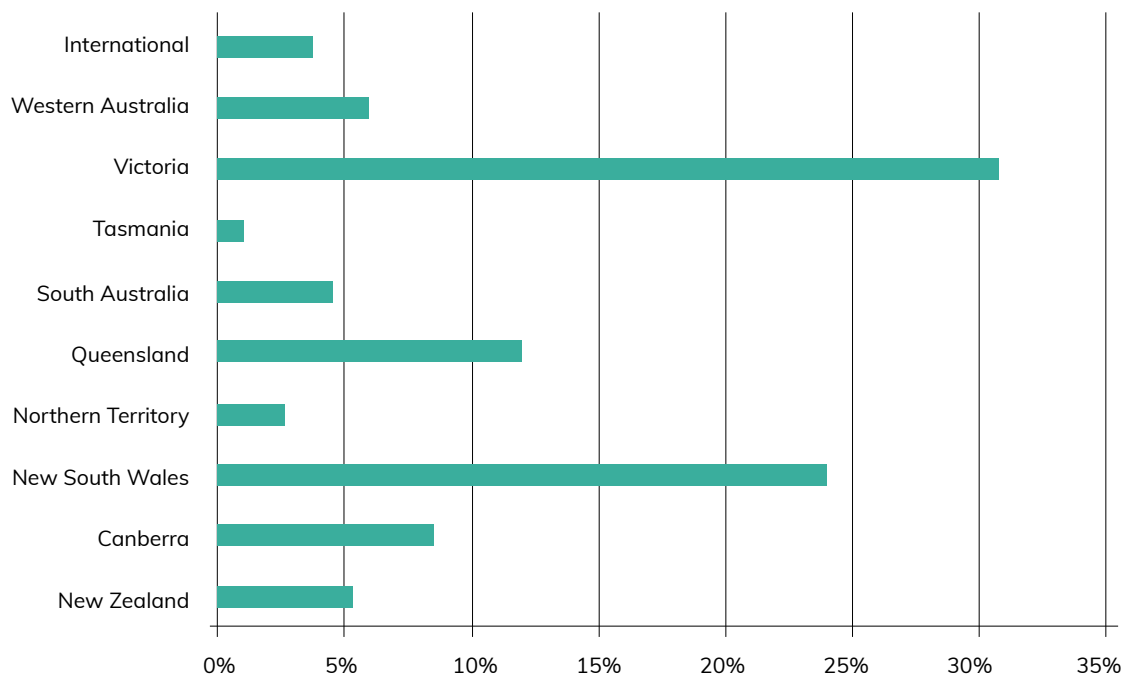


# Membership trends

## AES MEMBERSHIP NUMBERS 2000–2023



## MEMBERSHIP BY REGION 30 JUNE 2023



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# Regional networks

## AOTEAROA NEW ZEALAND

The Aotearoa New Zealand Committee has been active within the wider evaluation community domestically and across the Tasman with members serving in the AES Relationships Committee and the Vitality Committee.

We organised several activities during the 2022–2023 financial year. In July 2022 we hosted one of our popular lunchtime 'brown bag' sessions, where AES members could discuss a topic of their choosing. These lunchtime sessions enable knowledge sharing and networking among AES members. In November 2022 the Committee organised a festive Christmas party in Wellington. The event coincided with the biannual ANZEA conference (which also included AES Committee representation in the conference organising committee) and was well attended by members of both groups. We received feedback from a few attendees that they intended to join AES to be part of a thriving evaluation group, complimenting the organisers of the Christmas Party.

In 2023 we welcomed our new Committee member Rula Abu-Safieh Talahma who resides in Dunedin. Rula is a highly valued member of the Aotearoa New Zealand Committee and her contribution has been significant. Our Committee now has members residing in Auckland, Wellington, Christchurch and Dunedin which is an added bonus in terms of representation and facilitating regional relationships. A significant highlight of the year was the seminar hosted in March 2023 featuring Professor Janet Stephenson from the Centre for Sustainability at the University of Otago.

Professor Stephenson discussed the applicability of the Energy Cultures Framework when evaluating interventions related to the social implications of renewable energy. The session had a very high attendance rate and several attendees said that the subject matter was directly relevant to their current projects. Equally eventful was the June seminar with Murray Costello who discussed the challenges and learnings of establishing and maintaining the MAGnet community of practice, a network of New Zealand government departments that use evaluative thinking and tools to improve performance advice and governance. We look forward to continuing our regular seminars to add value to the wider AES community.

### *Looking ahead*

We actively engage in seminars and workshops hosted by evaluation groups based in New Zealand and overseas to share knowledge and build relationships across the wider research and evaluation sector. To complement these Zoom seminars, we will also facilitate a combination of virtual and face-to-face networking sessions. We will look into opportunities to collaborate with ANZEA for some of our activities.

### *Committee members*

Rula Abu-Safieh Talahma  
Marie Nissanka (Co-convener)  
Elisabeth Poppelwell (Co-convener)  
Kara Scally Irvine  
Jeevan Singh  
Sunita Singh (Co-convener)

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## CANBERRA

This year in the Canberra region, we structured our offerings through the seasons.

During winter we focused on inclusivity and making all members feel welcome:

- After a long gap in seeing our evaluation friends, we were keen to make the most of the 2022 International Evaluation Conference in Adelaide by hosting a networking event on the Monday evening before the conference. This provided a welcoming opportunity for AES members travelling from the ACT, and was open to conference attendees more broadly. Approximately 100 people attended, and appreciated the chance to connect with new and old friends from across the country and beyond.
- Following the Federal budget announcement of the establishment of an Australian Centre for Evaluation, we hosted a breakfast event at Old Parliament House on the role of evaluation in the APS reform agenda. A panel of presenters provided an array of perspectives: Suzanne Butler from the Department of Finance, Harry Greenwell from Treasury, Wendy Jarvie from the University of New South Wales, Russell Ayres from University of Canberra, and Professor Janine O'Flynn from the Australian National University. Over 70 people attended and enjoyed the opportunity to ask questions of the panel.

In spring we created an event to encourage member involvement:

- We hosted a brown-bag lunch as an opportunity to reflect on learnings from the 2022 conference. Julie Elliott facilitated discussions, and those who attended included people who had not made it to the conference and were keen to learn and hear from others. This has helped us gather insights from our members to inform future events.

In autumn and spring we offered online seminars to reach members beyond the region:

- AES Fellow Scott Bayley presented an online seminar: 'Why policies and programs fail' in October 2022.
- In May 2023, Scott Bayley, Jade Moloney, Duncan Rintoul and Brad Astbury presented 'An evaluation maturity model'. (The presentation and further details can be found on the [ARTD website](#).)

During summer we focussed on engagement and wellbeing to recharge:

- Each year we aim to have an informal end-of-year mingle. This year we enjoyed the Art Deco ambience of the historic Hyatt Hotel located near Parliament House. Approximately 30 people attended and appreciated the chance to connect, reflect on the year gone by and new possibilities ahead.

### *Looking ahead: Leveraging strategic relationships in the national capital*

We are looking to hold a range of diverse events in 2023–2024 to meet member professional development and networking needs. We will also continue to support the positive developments in Australian Government evaluation by working closely with the Relationships Committee.

### *Committee members*

Scott Bailey  
Julie Elliott  
Susan Garner  
Kim Grey (Co-convenor)  
Samantha Myers  
Ruth Nicholls (Co-convenor)  
Ruth Pitt  
John Stoney

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## NEW SOUTH WALES (NSW)

The NSW Committee continues to actively engage with the evaluation community, in particular by organising monthly free peer-learning events. Topics covered during these events in 2022–2023 touched on both evaluation theory and practice: most popular events focused on the diversity of evaluation approaches (July 2022, 52 participants); international development evaluation (March 2023, 40 participants); evaluating advocacy work (May 2023, 58 participants); and an open discussion on the new NSW Government evaluation guidelines (June 2023, 67 participants). Attendees particularly appreciate the peer learning format where a topic is briefly introduced before opening up to a facilitated discussion allowing all evaluators, whether emerging or experienced, to learn from each other.

The NSW Committee also organised a second round of the successful EvaluAdder buddy program launched the previous year. This new round was officially launched on 1 May with nine pairs of buddies and EvaluAdders. This program offers an informal complement to the AES group mentoring program.

The Committee has continued to communicate with its members via an engaging newsletter (one edition in December 2022) to promote its activities as well as share some insightful evaluation content from the EJA.

### *Looking ahead*

The NSW Committee is committed to deliver on its commitment to produce regular free events for the NSW evaluation community to actively engage in contemporary evaluation topics. In line with expectations expressed by new NSW members via the survey sent out after joining, future events will continue to aim for learning opportunities, complementing formal AES workshops and providing networking opportunities with evaluation peers.

Building on the success of similar joint events in the past two years, the NSW Committee will arrange an event with Social Impact Measurement Network of Australia (SIMNA) on place-based evaluation on 24 August. This event will be both online and face-to-face at the EY Sydney office. Members have welcomed the opportunity to reconnect face-to-face from time to time, and the Committee will explore the opportunity to organise such events. An event already planned will focus on evaluation and criminal justice with a panel of guest speakers from the Justice Reform Initiative.

Future editions of the NSW newsletter will strengthen its collaboration with the EJA to promote upcoming articles of interest to the NSW evaluation communities.

### *Committee members*

Laura Baker  
Ben Barnes  
Gavin Faunce  
Florent Gomez (Convenor)  
Melissa Kaltner  
Brian Keogh  
Linda Klein  
Jade Maloney  
Greg Masters (Co-ordinator free seminars)  
Ruth McCausland  
Kath Vaughan-Davies  
Keren Winterford

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## NORTHERN TERRITORY (NT)

During 2022–2023 the NT Committee hosted a range of in-person networking, learning and sharing opportunities. These contributed to strengthening positive and mutually beneficial relationships between AES members and others from a range of industries and sectors.

In the second half of 2022, the NT Committee hosted two events:

- In September 2022, a facilitated discussion and debrief on the 2022 AES conference from an NT perspective, with local presenters giving summaries of their presentations. The robust discussion could easily have gone on for longer than the allotted hour.
- An end-of-year catch-up was held in November at the Darwin Sailing Club with vibrant discussion amongst old and new AES members.

In the first half of 2023, the focus was also on in-person networking and events:

- A ‘meet and greet’ was held in early May 2023 with Rick Cummings, Emeritus Professor in Public Policy at Murdoch University held at the Darwin Waterfront. Professor Cummings was very generous with his time, and

people mingled throughout the evening with lots of evaluation conversations between government, private sector and academia.

- An interactive sunset seminar in late May on the State of Evaluation in Australia report from an NT perspective, held at the Darwin Sailing Club. Robert Sale, Director in Nous Darwin office, facilitated discussion amongst local evaluators and AES members, and these continued over dinner.
- A number of informal coffee catch-ups between Committee members and AES members visiting Darwin from across the NT and interstate provided opportunities for connection, cross-fertilisation of ideas and strengthening networks.

### Looking ahead

In 2023–2024 the NT Committee will continue to provide networking opportunities for NT members with a focus on online seminars relevant to the NT context.

### Committee members

Christabelle Darcy (Co-convenor)  
Alison Reedy (Co-convenor)

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## QUEENSLAND

During 2022–2023, activity in Queensland has focused extensively on the exciting challenge of hosting the aes23 International Evaluation Conference in Brisbane, from 25 to 29 September 2023. The Queensland Regional Committee supported the establishment of the aes23 Conference Committee and launch of the aes23 conference at the conclusion of the aes22 conference in Adelaide. It was pleasing to see the call for expressions of interest to join the aes23 Conference Committee resulted in both the input of some existing Queensland Regional Committee members as well as many new members.

Our traditional end-of-year event once again provided a valuable opportunity to meet with AES members and others in the evaluation community, and share and learn from experiences of fellow evaluators.

### Looking ahead

In 2023–2024, following a successful aes23 Conference(!), the Committee will look to refresh and renew its focus on delivering further events and opportunities to connect with our members and the broader evaluation community.

### Committee members

Samantha Abbato  
Kim Abbey (Co-convenor)  
Lewe Atkinson  
Kylie Brosnan  
Jillian Cawse  
Rebecca Duell  
Jo Durham  
Robert Grimshaw (Co-convenor)  
Cherie Lamb  
Carol Quadrelli  
Sarah Renals  
Rebecca Roebuck  
Tonita Taylor  
Peter Weston

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## **SOUTH AUSTRALIA (SA)**

During 2022–2023 the Committee focused on continuing to support the evaluation community through the provision of engagement and learning opportunities.

Some of the local Committee members were involved in the hosting of the AES International Evaluation Conference in Adelaide from 28 August to 1 September 2022. It marked a return to face-to-face conferences following the restrictions during the COVID-19 pandemic.

The Committee continued to host regular learning opportunities: as online, and mixed online and face-to-face events. Online presentations seemed to be favoured by attendees and these events attracted large numbers. The online format allowed us to:

- have speakers from outside of SA
- ensure non-city based local members had opportunities to participate
- collaborate with the Victorian AES Committee to facilitate joint events
- attract attendees from around Australia, New Zealand and other countries.

We were fortunate in having had speakers of high calibre who were able to present interesting and diverse material.

### ***Looking ahead***

In 2023–2024 our aim is to continue to experiment with different ways of supporting members and for members to contribute to evaluation thinking. We will continue to use online presentations as a means to connect with a wider audience, but plan to host at least one face-to-face event to provide members and attendees with a more engaging networking opportunity. We will endeavour to engage with members and event attendees to leverage the interest in evaluation as a means to grow local membership.

### ***Committee members***

Jane Austin  
Stephanie Carter  
Jin Chen  
Maria Eliadis  
Donna Holden  
Mark Mackay (Convenor in 2023)  
John Pilla (Convenor in 2022)  
Emily Saurman  
Colin Sharp  
Jessica Stevens  
Patricia Von Baumgarten

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## VICTORIA

During 2022–2023 the Victorian Committee has seen a significant change in its representation – saying farewell to long-standing Committee members Ian Patrick, Kon Jew-Cheung and Kerry Brogan. The Committee put out an expression of interest and received a great response, highlighting the engagement of its Victorian members. We have been pleased to welcome to the Committee: Kristy Hornby, Erin Davis, Amanda Jones, Lydia Philips and Emily Tee.

This process provided an opportunity to focus on the strategic priority Vitality, with consideration given to how best diversify committee representation to meet member needs.

This resulted in the Committee including a broader range of evaluation sectors. We have spent the first half of 2023 finalising the new Victorian Committee and reviewing how we may best support our members.

The Committee continued to deliver seminars during 2022–2023 with strong representation:

- A seminar on 'Whole of organisation M&E systems' was well received with over 300 attendees, and the topic created an ongoing conversation.
- The seminar 'Magnificent seven to the hateful eight: why Social Return on Investment is a good approach' sparked ongoing interest. Seminar speakers were encouraged to propose a workshop to AES to build upon their seminar, given most attendees were interested in learning more about applying concepts covered in practice.
- In September 2022, Associate Professor Amy Gullickson delivered her aes22 keynote in the form of an AES presentation. This attracted international evaluators, including representatives from the Mongolian Evaluation Association. With attendees particularly appreciative of the inclusive opportunity to experience a keynote when they were not able to attend the conference, and even for those that did, they mentioned hearing it again in a different format allowed for more interaction:

*'One other benefit of this format is some of us can join who are not in the same hemisphere as AES anymore ... thank you so much, Amy, and AES - Bill and Ruth. Really appreciate this reprisal.'*

*'It was good to listen to your presentation again with clarification sought on key aspects relevant to self-others and organisations.'*

### Looking ahead

As we move into 2023–2024, the Committee is excited to commence the planning for the AES conference to be held in Melbourne in 2024, as well as continuing to provide seminars for our members.

We are working with the SA Committee to co-deliver seminars across both jurisdictions. An SA Committee member facilitated our most recent seminar in early July. We also have a speaker presenting with SA on 'Artificial Intelligence in evaluation' at an upcoming seminar.

Our new Committee members are working on several seminars planned for later this year including;

- Economic evaluation, value for money and propositional evaluation (Julian King and Andrew Hawkins, co-hosted with the NSW Committee)
- Evaluating responses to family violence (Erin Davis and lived experience researchers)

### Committee members

Ruth Aston (Co-convenor)  
Kerry Brogan  
Mandy Charman  
Kon Jew-Chung  
Gabrielle Johnson  
Amanda Jones  
Caroline Henwood (Co-convenor)  
Kristy Hornby  
Alice Muller  
Ian Patrick  
Lydia Philips  
Stuart Raetz  
Emily Tee  
Eleanor Williams

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## WESTERN AUSTRALIA (WA)

During the 2022–2023 financial year, the WA Regional Network Committee held three events.

- An online seminar titled 'How can we support young and emerging evaluators? A discussion about a toolkit and beyond', was presented by Amanda Mottershead on 12 July.

Amanda is a member of the global EvalYouth network which supports and promotes young and emerging evaluators and youth-led accountability. The toolkit was developed for Voluntary Organizations for Professional Evaluation to improve membership and engagement of young and emerging evaluators.

- WA members attending the 2022 AES International Evaluation Conference met for an informal gathering where a post-conference event reflecting on the conference was suggested.

Such an event was held on 1 March: a hybrid (face-to-face and online) panel discussion titled 'Conferences and evaluators: reflections on aes22 and planning and ideas for aes23'.

- An online seminar was held on 'Evaluation by any other name does it smell as sweet – are evaluations still evaluations when they are audits, impact assessments, performance reviews, advocacy for funding?' This seminar attracted more participants from interstate and New Zealand than from WA.

The panellists were: Ali Mollinger-Sahba, Senior Consultant in Communities and Social Performance with WSP Australia; Mariana Atkins, Research Assistant Professor from the UWA Centre for Social Impact; and Brenden Huntley, Senior Internal Auditor from Department of Primary Industries and Regional Development.

This event was held in response to the observation that professionals across diverse roles and industries are finding themselves called on to bring evaluative thinking to their work. The rise of 'social impact' discourse in marketing and external affairs, and the push for ESG reporting and narratives in the corporate world, has drawn evaluation out of its traditional role in social services and public policy, rebranding it by many other names. As Shakespeare says, 'a rose by any other name would smell as sweet'.

### Looking ahead

For 2023–2024 the WA Committee is planning to have the 2022 IPAA Awards recipients present to our members. To offer further networking opportunities to our members, we are also planning to have an end-of-year social gathering.

### Committee members

Janet Conte (Co-convenor)  
Penelope Cooke  
Rick Cummings  
Kevin Dolman  
Christina Kadmos  
Lisette Kaleveld (Co-convenor)  
Dorothy Lucks  
Ali Mollinger-Sahba  
Theo Nabben  
Nolan Stephenson

# Operational Working Groups

## AWARDS AND RECOGNITION WORKING GROUP

The Awards and Recognition Working Group (ARWG) has continued to engage in the assessment and promotion of excellent practice over the year. The group identified six awardees in 2022, which included one in each of the existing categories of award.

ARWG has one new member: Gill Potaka-Osborne. Gill is an experienced evaluator with expertise in conducting culturally safe evaluations in New Zealand. Gill was a member of the ARWG previously, as one of the two assessors for the Indigenous Evaluation Award. Gill takes the place of one of our long-time members who left in 2023. We look forward to the contribution Gill will make to the group.

ARWG supports the AES in its strategic priorities of Pathways and Cultural capacity. In relation to Pathways, the identification and sharing of excellent practice is central to the work of the group. The awards identify excellent practice which supports AES members in the development of their own expertise. In relation to Cultural

capacity, the revitalised award suite has a stronger focus on culturally safe evaluation theory, practice and use. The empowerment of Indigenous communities in evaluations is more prominent in the refreshed Indigenous Evaluation Award and in the new Award for Enhancing the Social Good.

### Looking ahead

In 2023–2024 the working group aims to continue its focus on communicating and sharing excellent practice and recruit additional members to add to the strength of the group.

### Group members

Dana Cross  
Rick Cummings  
Kevin Dolman  
Farida Fleming  
Kym Hamilton  
Jess Kenway  
Amanda Mottershead  
Ian Patrick  
Gill Potaka-Osborne  
Mathea Roorda

## 2022 Awards recipients

### Evaluation System Award

awarded to

Department of Education and Training Victoria Evaluation Practice

### Indigenous Evaluation Award

awarded to

Curijo Research Monitoring and Evaluation Team

### EJA Publication Award

awarded to

Northern Land Council for 'Checking up to keep on track: An Aboriginal-led approach to monitoring well-being'

### Public Sector Evaluation Award

awarded to

Te Ihuwaka | Education Evaluation Centre, Education Review Office for Evaluation of learning in residential care

### Emerging New Talent Award

awarded to

Allison Clarke, CPE University of Melbourne

### Award for Enhancing the Social Good

awarded to

Centre for Health Service Development, Australian Health Services Research Institute, University of Wollongong – for Evaluation of the Pathways to Community Living Initiative



Emerging New Talent Award – Allison Clarke



EJA Publication Award – Northern Land Council



Award for Enhancing the Social Good – Centre for Health Service Development, Australian Health Services Research Institute, University of Wollongong



Evaluation System Award – Department of Education and Training Victoria



Public Sector Evaluation Award – Te Ihuwaka | Education Evaluation Centre, Education Review Office



Indigenous Evaluation Award – Curijo Research Monitoring and Evaluation Team

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# Special Interest Groups

## DESIGN AND EVALUATION SPECIAL INTEREST GROUP

The Design and Evaluation Special Interest Group goes from strength to strength. We now have an estimated 300 members who regularly attend or participate in SIG activities.

Late 2022 marked the continuation of our Learning Sprint series – ‘Design and evaluation through the looking glass: capability, collaboration and creativity’. Consistent with previous years, feedback was overwhelmingly positive. We incorporated feedback and scheduled the Sprint between lunchtime sessions and the end of the day. Topics covered the use of PhotoVoice; real-time evaluation; evaluating co-design capabilities; systems thinking; and video games! Attendance was similar to previous years, and feedback was positive reiterating that the Learning Sprint is providing consistent value as an offering to close out the year.

The SIG has also continued an effort for lunchtime learning with Eval ThinkTank. The first ThinkTank centred on the use of evaluation systems and platforms and had more than 100 people in attendance, with a range of passionate questions and discussion.

The interest from AES members is clearly still there for ‘more’ on this topic and we look forward to another fantastic year.

### *Looking ahead*

We will continue our lunchtime learning series, including attending the 2023 International Evaluation Conference in Brisbane. Beyond this, we are planning another iteration of the Learning Sprint which has been a standout experience for the team.

### *Group members*

Charlotte Atherton  
Jess Dart  
Jo Farmer  
Matt Healey  
Ellie McDonald  
Shani Rajendra  
Nic Vogelpoel

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## MULTICULTURAL EVALUATION SPECIAL INTEREST GROUP

The Multicultural Evaluation Special Interest Group (MESIG) was established in 2020 to enhance multicultural evaluation ideas, discussions, theories and practices, and provide a focus for sharing resources and learning about these topics within the AES. Our definition of multiculturalism extends beyond ethnic and ancestral cultures to organisational cultures and other subgroups of people (such as members of the LGBTQI+, senior Australians, people with disabilities, youth and women) who share a similar context of oppression and/or being minoritised.

The MESIG also seeks to encourage greater diversity in the AES membership and to provide a space for diverse voices to meet, discuss and learn. In these ways the MESIG aims to contribute to all four AES strategic priorities (Cultural capacity, Pathways, Vitality, and Relationships).

The MESIG membership strongly believe 'how we work together' is as important as 'what we achieve' if we are to truly embrace diversity and equity. We aim to provide a space for people to have 'deep' and safe discussions, connect with new people and learn more about racism, ableism, ageism, sexual discrimination, homophobia and other 'isms' that impact on the practice of evaluation. And to generate ideas for what individuals, the AES and the MESIG can do better.

In 2022–2023 the MESIG has largely focused on facilitating topical discussion, and events for the AES membership aimed at continuing sharing and learning.

Highlights over the last year included:

- On 1 September 2022, the first in-person annual general meeting of the MESIG was hosted at aes22. During the meeting new Co-chairs were elected and plans for the next year discussed.
- On the same day, the MESIG facilitated an interactive session at aes22 titled 'Weaving greater equity into evaluation practice', where participants shared experiences, lessons and practices for practically addressing issues of equity in their evaluation practice. Several MESIG members also facilitated sessions at aes22 on themes associated with equity.

- On 26 October the group hosted an online interactive session titled 'A new paradigm for LGBTQ+ evaluation' with guest speaker Gregory Phillips. During the session participants reviewed the key principles of a newly developed framework from the US aimed at increasing the focus on disparities facing lesbian, gay, bisexual, transgender, intersex, queer and gender minority populations.
- On 1 March the MESIG hosted an online session titled 'Equity and systemic evaluation' with guest speaker Bob Williams. Participants explored the potential of using systems thinking to strengthening equity-focused evaluations.
- On 12 May the group hosted an online session titled 'Culturally responsive focus groups: a brief introduction' with guest speaker Jori Hall. Participants learned how to make focus groups more culturally responsive.
- On 8 June MESIG hosted an online session titled 'Visualising data without perpetuating inequality' with guest speaker Eli Holder. Participants learned how some common data visualisation techniques can (unconsciously) contribute to inequality and some alternatives ways to present data.

The online sessions were recorded and are available on the AES YouTube channel.

### *Looking ahead*

In 2023–2024 the MESIG is keen to continue supporting talks and interactive sessions that highlight topical issues of equity, assist evaluators to critically examine their approaches and practices, and teach evaluators new skills. We also hope to expand the number of AES members actively participating in the MESIG.

### *Group members*

Erin Blake (Co-chair)  
Yonas Dare  
Katherine Dinh  
Milbert Gawayia  
Jane Howard (Co-chair)  
Eva Sarr  
Jerry Winston

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## SYSTEMS EVALUATION SPECIAL INTEREST GROUP

The Systems Evaluation Special Interest Group (SIG) meets every month for planning purposes and hosts an event every two months. There are currently 182 members of this SIG of whom around 20–40 attend each event. These occur online and include a mix of webinar style presentations and discussions.

The vision of the Systems Evaluation SIG is for evaluators to be able to pivot between prevailing evaluation practices and those informed by the language concepts and theories of systems thinking. Our mission is to facilitate a respectful discourse that provides space to discuss different conceptions of systems with a mindset of a 'mutually disputatious community of respectful truth seekers' committed to finding common ground and exploring differences.

We achieved a series of engaging discussions with a diverse range of experts about what systems evaluation means to them.

These were:

- September 2022 – Book club style meeting. Discussion was based on the Evaluation of Programmes in Complex Adaptive Systems (ENCOMPASS) framework.
- September 2022 – Lunchtime meeting at the aes22 conference in Adelaide to discuss what was working for people and opportunities into the future.

- November 2022 – Donella Meadows on leverage points
- December 2022 – Systems Evaluation SIG Christmas informal chat
- March 2023 – Book club session: *Great New Guide to System Thinking and Practice*
- May 2023 – Judy Oakden presented 'Tools for coping with complexity in evaluation'.

The Co-chairs met at the beginning of February to plan the year and develop an abstract for a paper at aes23 in Brisbane.

### *Looking ahead*

We aim to continue to provide a broad range of evaluators with access to lively events to develop relationships and discuss issues relevant to systems evaluation.

### *Group members*

Julie Elliott  
Andrew Hawkins  
Brian Keogh  
Kara Scally-Irvine

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## AUSTRALIAN PUBLIC SECTOR EVALUATION NETWORK

The focus for the Australian Public Sector Evaluation Network (APSEN) Steering Committee this year has been on how we best meet the needs of the 850 members of our SIG, without replicating other local AES offerings.

This is intended to bring more vitality to the SIG, make deeper connections and help people with their practice and professional pathways.

We greatly appreciated the guidance from the Board on this topic earlier in the year.

We have since agreed to use the SIG to share tools, templates and insights from within government that are relevant to others working inside, or in collaboration with government.

### *Looking ahead*

In 2023–2024 ASPEN plans to host a series of presentations, on a quarterly basis on relevant topics, such as:

- Government evaluation 101 – including access to all tools and templates used by the Centre for Evaluation and Research Evidence
- An online panel comprising policy leaders, internal evaluators and external evaluators.

### *Group members*

Michael Amon  
Zoe Bishop-Kinlyside  
Martin Bortz  
James Burchmore  
Raoul Craemer  
Christabelle Darcy  
Gavin Faunce  
David Gardiner  
Eleanor Kerdo  
Nolan Stephenson  
Tbomas Whitting

# AES Life Members and Fellows

Two new Fellows, **Amohia Boulton** and **Sharon Clarke**, were inducted at the 2022 AES International Evaluation Conference in Adelaide. This brings the total number of Fellows to 27.

In line with the Pathways domain of the AES strategic priorities 2019–2022, three Fellows (Alan Woodward, Rick Cummings and Dorothy Lucks) participated as mentors in the group mentoring program in 2022 – continuing a strong involvement by Fellows in this program.

Following on from earlier work, Anthea Rutter has added three more interviews with Fellows, bringing the total to 17 interviews (available on the AES blog [www.aes.asn.au/aes-blog](http://www.aes.asn.au/aes-blog)).

## Looking ahead

As approved by the Board, a review is underway of the AES Fellows membership category. The review is being conducted by Rick Cummings and Anthea Rutter. It involves a desktop audit of AES records on the contributions of Fellows over their 20 year history; a survey of the Fellows; conversations with Board members, chairs of committees and working groups; and exploring how similar membership categories work in other professional societies. The review is expected to be completed prior to the 2023 AES conference in late September.

We are expecting two nominations for Fellows this year.

## Fellows Coordinating Committee

Anona Armstrong  
Rick Cummings (Coordinator)  
Zita Unger

## Life Members

Anona Armstrong  
Ian Trotman

## AES Fellows

Lyn Alderman	Queensland, 2021
Anona Armstrong	Victoria, 2003
Scott Bayley	Aust. Capital Territory, 2016
Amohia Boulton	Aotearoa New Zealand, 2022
Darrel Caulley†	Victoria, 2005
Sharon Clarke	South Australia, 2022
Janet Clinton	Victoria, 2021
Rick Cummings	Western Australia, 2013
Jess Dart	Victoria, 2021
Sue Funnell	New South Wales, 2003
Penny Hawkins	Aotearoa New Zealand, 2009
Dorothy Lucks	Western Australia,, 2021
Anne Markiewicz	Victoria, 2015
Chris Milne	New South Wales, 2003
Jenny Nealet	Aotearoa New Zealand, 2015
John Owen	Victoria, 2003
Patricia Rogers	Victoria, 2016
Anthea Rutter	Victoria, 2016
Colin Sharp	South Australia, 2003
Ralph Straton	Western Australia, 2004
Ian Trotman	Aotearoa New Zealand, 2003, Emeritus
Zita Unger	Victoria, 2013
Yoland Wadsworth	Victoria, 2007
Nan Wehipeihana	Aotearoa New Zealand, 2021
Gill Westthorp	Tasmania, 2018
Jerome Winston	Victoria, 2004
Alan Woodward	New South Wales, 2019

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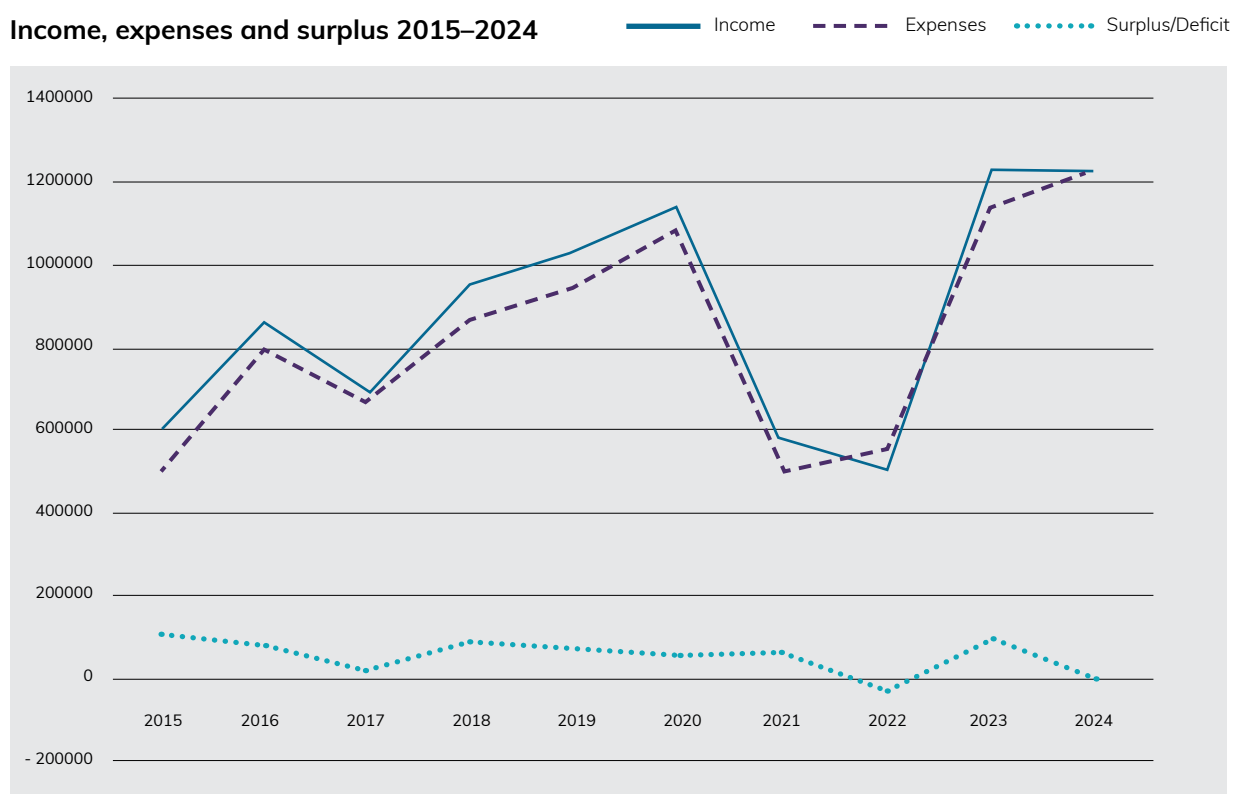
# FINANCIAL REPORTS



# Finance summary

	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24 Budget
<b>INCOME</b>							
Prof development	172,780	324,542	158,392	244,257	249,220	255,418	258,000
Conference income	593,572	488,755	717,016	NIL	NIL	708,092	701,006
Memberships	167,487	186,475	191,531	209,224	231,312	231,586	235,000
Publications	14,463	20,814	23,043	22,014	27,908	25,276	30,000
Other Income	197	197	43,235	90,819	8	8	10
<b>Total Income</b>	<b>948,499</b>	<b>1,020,783</b>	<b>1,133,217</b>	<b>566,314</b>	<b>508,448</b>	<b>1,220,380</b>	<b>1,224,016</b>
<b>EXPENDITURE</b>							
Prof development	111,626	186,757	111,229	112,718	125,692	126,097	124,000
Conference/projects	426,880	388,087	572,167	NIL	NIL	536,907	533,306
Strategic projects	1,326	28,516	29,090	21,582	34,461	4,569	41,700
Memberships	2,084	3,169	3,457	3,061	18,743	21,097	29,500
Publications, inc EJA	33,120	30,734	53,173	54,425	52,801	60,951	62,000
Other expenses				466			
<b>SUB-TOTAL</b>	<b>575,036</b>	<b>637,263</b>	<b>769,116</b>	<b>192,252</b>	<b>231,697</b>	<b>749,621</b>	<b>790,506</b>
Admin/Governance	295,050	308,037	312,977	311,486	319,610	387,803	429,930
<b>Total Expenditure</b>	<b>870,086</b>	<b>945,300</b>	<b>1,082,093</b>	<b>503,738</b>	<b>551,307</b>	<b>1,137,424</b>	<b>1,220,436</b>
<b>SURPLUS / (LOSS)</b>	<b>78,413</b>	<b>75,483</b>	<b>51,124</b>	<b>62,576</b>	<b>(42,859)</b>	<b>82,956</b>	<b>3,580</b>

Income, expenses and surplus 2015–2024



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# Annual Financial Report

AUSTRALIAN EVALUATION SOCIETY LTD  
ABN 13 886 280 969  
AS AT 30 JUNE 2023

Prepared by V.P. Cannizzaro & Co - Certified Practising Accountants

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## BOARD OF DIRECTORS REPORT

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2023

### Principal Activities

The principal activities of the entity during the financial year were:  
Promote Ethics and Standards in evaluation practice in Australia and New Zealand Advancing Social or Public Welfare.

### Significant Changes

No significant changes in the nature of the entity's activity occurred during the financial year.

### Operating Result

The Profit for the financial year amounted to \$82,956.

### Going Concern

The Australian Evaluation Society has managed to return to post Covid normal in financial year 2023 and held the first conference after two years of restrictions.

Based on the current assessment as of the date of signing the financial report, the directors have concluded that the going concern basis of accounting is appropriate for the organisation.

### Committee Members

The names of each person who has been a committee member during the year and to the date of this report are:

Kiri Parata, President  
Carina Calzoni, Treasurer  
Anne Stephens, Vice-President  
Nicole Tujague  
Tony Kiessler  
Jade Maloney

Signed in accordance with a resolution of the Members of the Board on:



Kiri Parata (President)



Carina Calzoni (Treasurer)

Dated 24 August 2023

## ASSETS AND LIABILITIES STATEMENT

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2023  
ACCRUAL BASIS

	Notes	2023	2022
<b>ASSETS</b>			
<b>CURRENT ASSETS</b>			
<b>Cash and Cash Equivalents</b>			
ANZ V2 Account		79,257	79,247
ANZ Business Account		653,697	566,224
<b>Total Cash and Cash Equivalents</b>		<b>732,954</b>	<b>645,471</b>
<b>Trade and Other Receivables</b>			
	2		
Trade Debtors		2,667	25,504
Prepaid Expenses and Event Deposits		236,859	289,262
<b>Total Trade and Other Receivables</b>		<b>239,526</b>	<b>314,766</b>
<b>TOTAL CURRENT ASSETS</b>		<b>972,480</b>	<b>960,237</b>
<b>NON-CURRENT ASSETS</b>			
Plant and Equipment and Vehicles	3	6,064	5,717
Intangibles	4	14,030	14,723
<b>TOTAL NON-CURRENT ASSETS</b>		<b>20,094</b>	<b>20,440</b>
<b>TOTAL ASSETS</b>		<b>992,574</b>	<b>980,677</b>
<b>LIABILITIES</b>			
<b>CURRENT LIABILITIES</b>			
Trade and Other Payables	5	328,510	401,549
GST Payable		28,177	31,392
Employee Entitlements	6	32,576	27,381
<b>TOTAL CURRENT LIABILITIES</b>		<b>389,263</b>	<b>460,322</b>
<b>TOTAL LIABILITIES</b>		<b>389,263</b>	<b>460,322</b>
<b>NET ASSETS</b>		<b>603,311</b>	<b>520,355</b>

The accompanying notes form part of these financial statements. These statements should be read in conjunction with the attached compilation report.

## ASSETS AND LIABILITIES STATEMENT CON'T

	Notes	2023	2022
<b>MEMBER'S FUNDS</b>			
<b>RETAINED PROFITS</b>			
Retained Earnings Beginning of Year		520,355	563,213
Current Year Earnings		82,956	(42,859)
<b>TOTAL RETAINED PROFITS</b>		<b>603,311</b>	<b>520,355</b>
<b>TOTAL MEMBER'S FUNDS</b>		<b>603,311</b>	<b>520,355</b>

## INCOME AND EXPENDITURE STATEMENT

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2023  
ACCRUAL BASIS

	Notes	2023	2022
<b>INCOME</b>			
Interest Income		8	8
Conference Income		708,092	–
Membership Fees		231,586	231,312
Publication Sales		25,276	27,908
Workshop Income		255,418	249,220
<b>TOTAL INCOME</b>		<b>1,220,380</b>	<b>508,448</b>
<b>EXPENDITURE</b>			
Administration & Governance		383,891	314,732
Conference Expenses		536,907	–
Cost of Publications		60,951	52,801
Depreciation		3,912	4,878
Membership Services		21,097	18,743
Special Projects		4,569	34,461
Workshops		126,097	125,692
<b>TOTAL EXPENDITURE</b>		<b>1,137,424</b>	<b>551,307</b>
<b>CURRENT YEAR SURPLUS / (DEFICIT)</b>		<b>82,956</b>	<b>(42,859)</b>
<b>CURRENT YEAR SURPLUS / (DEFICIT) ATTRIBUTABLE TO MEMBERS</b>		<b>82,956</b>	<b>(42,859)</b>

The accompanying notes form part of these financial statements. These statements should be read in conjunction with the attached compilation report.

## MOVEMENTS IN EQUITY

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2023  
ACCRUAL BASIS

	Notes	2023	2022
<b>EQUITY</b>			
Opening Balance		520,355	563,213
<b>Increases</b>			
Profit / (Loss) for the Period		82,956	(42, 859)
<b>Total Increases</b>		<b>82,956</b>	<b>(42, 859)</b>
<b>TOTAL EQUITY</b>		<b>603,311</b>	<b>520,355</b>

## STATEMENT OF CASH FLOWS

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2023

	Notes	2023	2022
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>			
Receipts from Members and Customers		1,301,265	792,482
Payments to Suppliers and Employees		(1,198,664)	(739,916)
Interest Received		8	8
<b>NET CASH INFLOW FROM OPERATING ACTIVITIES</b>		<b>102,609</b>	<b>52,574</b>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>			
Fixed assets acquired		(15,126)	(1,445)
<b>NET CASH INFLOW</b>		<b>87,483</b>	<b>51,129</b>
Cash and Cash Equivalents as at 1 July 2022		645,471	594,342
<b>CASH AND CASH EQUIVALENTS AS AT 30 JUNE 2023</b>		<b>732,954</b>	<b>645,471</b>

# NOTES TO THE FINANCIAL STATEMENTS

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2023  
ACCRUAL BASIS

## 1. Summary of Significant Accounting Policies

The financial statements cover Australian Evaluation Society Limited as an individual entity. Australian Evaluation Society Limited is a not-for-profit entity incorporated in Victoria under Corporation Act 2001 and reporting under Australian Charities and Not For Profits Commission Act 2012 ('the Act').

In the opinion of the Board of Directors, Australian Evaluation Society Limited is not a reporting entity since there are unlikely to exist users of the financial report who are not able to command the preparation of reports tailored to satisfy specifically all of their information needs. These special purpose financial statements have been prepared to meet the reporting requirements of the Act.

The financial statements have been prepared in accordance with the disclosure requirements of AASB 101 Presentation of Financial Statements, AASB 107 Statement of Cash Flows, AASB 108 Accounting Policies, Changes in Accounting Estimates and Errors, AASB 124 Related Party Disclosures, AASB 1048 Interpretation of Standards and AASB 1054 Australian Additional Disclosures. We have not assessed if the financial statements comply with all the recognition and measurement requirements of the Australian Accounting Standards.

The financial statements have been prepared on an accruals basis and are based on historical costs modified, where applicable, by the measurement at fair value of selected non-current assets, financial assets, and financial liabilities.

Significant accounting policies adopted in the preparation of these financial statements are presented below and are consistent with prior reporting periods unless otherwise stated.

### Income Tax

The Entity is exempt from income tax under Division 50 of the Income Tax Assessment Act 1997.

### Property, Plant and Equipment (PPE)

Each class of property and office equipment are carried at cost less, where applicable, any accumulated depreciation.

The depreciable amount of all PPE is depreciated over the useful lives of the assets to the entity commencing from the time the asset is held ready for use

### Impairment of Assets

At the end of each reporting period, the Board of Directors reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have been impaired. If such an indication exists, an impairment test is carried out on the asset by comparing the recoverable amount of the asset, being the

higher of the asset's fair value less costs to sell and value in use, to the asset's carrying amount. Any excess of the asset's carrying amount over its recoverable amount is recognised in the income and expenditure statement

### Employee Provisions

Provision is made for the entity's liability for employee benefits arising from services rendered by employees to the end of the reporting period. Employee provisions have been measured at the amounts expected to be paid when the liability is settled.

### Cash on Hand

Cash on hand includes cash on hand, deposits held at call with banks, and other short-term highly liquid investments with original maturities of three months or less.

### Accounts Receivable and Other Debtors

Accounts receivable and other debtors include amounts due from members as well as amounts receivable from donors. Receivables expected to be collected within 12 months of the end of the reporting period are classified as current assets. All other receivables are classified as non-current assets.

### Revenue and Other Income

Revenue is recognised when the amount of the revenue can be measured reliably, it is probable that economic benefits associated with the transaction will flow to the entity and specific criteria relating to the type of revenue as noted below, has been satisfied.

Revenue is measured at the fair value of the consideration received or receivable after taking into account any trade discounts and volume rebates allowed.

Revenue from the sale of goods is recognised at the point of delivery as this corresponds to the transfer of significant risks and rewards of ownership of the goods and the cessation of all involvement in those goods.

Interest revenue is recognised using the effective interest method.

Membership fees are payable annually in advance and are due on the Anniversary of the month of joining. Membership fees are treated as income when the subscription is received except when the membership exceeds one year. Income received in respect of memberships exceeding one year are carried forward as income in advance (current liability) and recognised in the subsequent period. Fees received from new members whose membership has not been approved prior to year-end are brought to account as income in advance (current liability) and carried forward to the year in which the membership is approved.

These notes should be read in conjunction with the attached compilation report

Conference and Seminar events income and expenditure are recognised in the year that the event is held. Events income and expenditure which is received or expended prior to year-end, but which relates to an event to be held after year end, is recognised as income in advance (current liability) and conference expenses prepaid (current or non-current asset) and is carried forward to the year in which the event is held.

Where conference administration is outsourced, income received and expenditure incurred by the conference organiser prior to year-end, but which relates to a conference to be held after year end, have not been recognised.

Government grants and subsidies income is recognised when the entity obtains control over the funds, which is generally at the time of receipt. Grants relating to expense items are recognised as income over the periods necessary to match the grant to the costs they are compensating.

If conditions are attached to the grant that must be satisfied before the entity is eligible to receive the contribution, recognition of the grant as revenue will be deferred until those conditions are satisfied.

All revenue is stated net of the amount of goods and services tax.

#### Goods and Services Tax (GST)

Revenues, expenses and assets are recognised net of the amount of GST, except where the amount of GST incurred is not recoverable from the Australian Taxation Office (ATO). Receivables and payables are stated inclusive of the amount of GST receivable or payable. The net amount of GST recoverable from, or payable to, the ATO is included with other receivables or payables in the assets and liabilities statement.

#### Accounts Payable and Other Payables

Accounts payable and other payables represent the liability outstanding at the end of the reporting period for goods and services received by the association during the reporting period that remain unpaid. The balance is recognised as a current liability with the amounts normally paid within 30 days of recognition of the liability.

	2023	2022
<b>2. TRADE AND OTHER RECEIVABLES</b>		
Prepayments		
Prepaid Expenses and Event Deposits	236,859	289,262
<b>Total Prepayments</b>	<b>236,859</b>	<b>289,262</b>
<b>TOTAL TRADE AND OTHER RECEIVABLES</b>	<b>236,859</b>	<b>289,262</b>
	2023	2022
<b>3. PLANT AND EQUIPMENT, MOTOR VEHICLES</b>		
Plant and Equipment		
Plant and Equipment at Cost		
Art Collection	2,500	2,500
Less Accumulated Depreciation + Impairment on Art Collection	(555)	(453)
Office Furniture & Equipment	21,621	19,495
Less Accumulated Depreciation on Office Furniture & Equipment	(17,501)	(15,825)
<b>Total Plant and Equipment at Cost</b>	<b>6,064</b>	<b>5,717</b>
<b>TOTAL PLANT AND EQUIPMENT</b>	<b>6,064</b>	<b>5,717</b>
<b>TOTAL PLANT AND EQUIPMENT, MOTOR VEHICLES</b>	<b>6,064</b>	<b>5,717</b>

These notes should be read in conjunction with the attached compilation report

	2023	2022
<b>4. INTANGIBLES</b>		
Website costs		
Website Development	31,299	18,299
Less Accumulated Amortisation	(17,269)	(15,136)
<b>Total Website Costs</b>	<b>14,030</b>	<b>3,163</b>
Other Intangibles		
Formation Expenses	–	11,560
<b>Total Other Intangibles</b>	<b>–</b>	<b>11,560</b>
<b>TOTAL INTANGIBLES</b>	<b>14,030</b>	<b>14,723</b>

	2023	2022
<b>5. TRADE AND OTHER PAYABLES</b>		
Trade Payables		
Accounts Payable	5,525	20,833
<b>Total Trade Payables</b>	<b>5,525</b>	<b>20,833</b>
Other Payables		
ANZ Credit Card	13,384	10,586
Prepaid Income	298,081	363,209
Sundry Creditors	11,520	6,921
<b>Total Other Payables</b>	<b>322,985</b>	<b>380,716</b>
<b>TOTAL TRADE AND OTHER PAYABLES</b>	<b>328,510</b>	<b>401,549</b>

	2023	2022
<b>6. EMPLOYEE ENTITLEMENTS</b>		
PAYGW Payable	5,504	3,498
Provision for Annual Leave	8,023	5,811
Provision for Long Service Leave	19,049	18,072
<b>TOTAL EMPLOYEE ENTITLEMENTS</b>	<b>32,576</b>	<b>27,381</b>

#### 7. TRANSACTIONS WITH RELATED PARTIES

Australian Evaluation Society Ltd did not have any transactions with related parties during the financial year ended 30 June 2023. None for the financial year ended 30 June 2022

These notes should be read in conjunction with the attached compilation report

## DECLARATION BY THE MEMBERS OF THE BOARD

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2023

We, Kiri Parata and Carina Calzoni being members of the Board of Directors of Australian Evaluation Society, certify that-

- there are reasonable grounds to believe that the registered entity is able to pay all of its debts, as and when they become due and payable; and
- the financial statements and notes give a true and fair view of the financial position and performance of Australian Evaluation Society Ltd during and at the end of the financial year ending on 30 June 2023 and satisfy the requirements of the Australian Charities and Not-for-profits Commission Act 2012.

Signed in accordance with subsection 60.15(2) of the Australian Charities and Not-for-profit Commission Regulations 2022.



Signed



Signed

Dated 24 August 2023

# Compilation Report

## Australian Evaluation Society Ltd For the year ended 30 June 2023

Compilation report to Australian Evaluation Society Ltd.

We have compiled the accompanying special purpose financial statements of Australian Evaluation Society Ltd, which comprise the asset and liabilities statement as at 30 June 2023, income and expenditure statement, the statement of cash flows, a summary of significant accounting policies and other explanatory notes. The specific purpose for which the special purpose financial statements have been prepared is set out in Note 1.

### The Responsibility of the Board of Directors

The Board of Australian Evaluation Society Ltd are solely responsible for the information contained in the special purpose financial statements, the reliability, accuracy and completeness of the information and for the determination that the basis of accounting used is appropriate to meet their needs and for the purpose that financial statements were prepared.

### Our Responsibility

On the basis of information provided by the partners we have compiled the accompanying special purpose financial statements in accordance with the basis of accounting as described in Note 1 to the financial statements and APES 315 *Compilation of Financial Information*.

We have applied our expertise in accounting and financial reporting to compile these financial statements in accordance with the basis of accounting described in Note 1 to the financial statements. We have complied with the relevant ethical requirements of APES 110 *Code of Ethics for Professional Accountants*.

### Assurance Disclaimer

Since a compilation engagement is not an assurance engagement, we are not required to verify the reliability, accuracy or completeness of the information provided to us by management to compile these financial statements. Accordingly, we do not express an audit opinion or a review conclusion on these financial statements.

The special purpose financial statements were compiled exclusively for the benefit of the Board who are responsible for the reliability, accuracy and completeness of the information used to compile them. We do not accept responsibility for the contents of the special purpose financial statements.



VP Cannizzaro & Co

Fellow Certified Practising Accountants & Chartered Tax Advisors

PO Box 606, Carlton South Victoria 3053

Vito Cannizzaro

Dated: 18 / 08 / 2022

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# Auditor's report

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**bpr**  
audit  
*Your Independent External Expert*

**INDEPENDENT AUDITOR'S REPORT  
TO THE MEMBERS OF AUSTRALIAN EVALUATION SOCIETY LTD**

**Opinion**

We have audited the accompanying financial report, being a special purpose financial report of Australian Evaluation Society Ltd (The Entity), which comprises the assets and liabilities statement as at 30 June 2023, income and expenditure statement, the statement of movements in equity and the statement of cash flows for the year then ended, notes to the financial statements and the director's declaration.

In our opinion the accompanying financial report of Australian Evaluation Society Ltd is in accordance with Division 60 of the Australian Charities and Not-for-profits Commission Act 2012 (ACNC Act), including:

- giving a true and fair view of the Entity's financial position as at 30 June 2023 and of its financial performance for the year then ended; and
- complying with Australian Accounting Standards to the extent described in Note 1, and Division 60 of the Australian Charities and Not-for-profits Commission Regulations 2023.

**Basis for Opinion**

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Report section of our report. We are independent of the Entity in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 Code of Ethics for Professional Accountants (including Independence Standards) (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

**Emphasis of Matter - Basis of Accounting**

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared for the purpose of fulfilling the Entity's financial reporting responsibilities under the ACNC Act. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

**Responsibility of the Responsible Entities for the Financial Report**

The responsible entities of the Entity are responsible for the preparation of the financial report that gives a true and fair view and have determined that the basis of preparation described in Note 1 to the financial report is appropriate to meet the requirements of the ACNC Act and the needs of the members. The responsible entities' responsibility also includes such internal control as the responsible entities determine is necessary to enable the preparation of a financial report that gives a true and fair view and is free from material misstatement, whether due to fraud or error.

In preparing the financial report, the responsible entities are responsible for assessing the Entity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the responsible entities either intend to liquidate the Entity or to cease operations, or have no realistic alternative but to do so.



LIABILITY LIMITED BY A SCHEME  
APPROVED UNDER PROFESSIONAL  
STANDARDS LEGISLATION

### **Auditor's Responsibilities for the Audit of the Financial Report**

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

As part of an audit in accordance with the Australian Auditing Standards, we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the directors.
- Conclude on the appropriateness of the directors' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Entity to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

We communicate with the directors regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

  
BPR Audit Pty Ltd, 2023 14:45 GMT+10)

Bernie Rohan  
Director

BPR Audit Pty Ltd  
(Authorised Audit Company)  
Reg. No. 311673  
G03, 12-14 Cato Street  
Hawthorn East VIC 3123

Dated: Aug 24, 2023

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HAWTHORN EAST, VIC  
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**AUDITOR'S INDEPENDENCE DECLARATION  
TO THE MEMBERS OF AUSTRALIAN EVALUATION SOCIETY LTD**

I declare that, to the best of my knowledge and belief, during the year ended 30 June 2023 there have been:

- a. no contraventions of the auditor independence requirements as set out in the *Australian Charities and Not-for Profits Commission Act 2012* in relation to the audit; and
- b. no contraventions of any applicable code of professional conduct in relation to the audit.

  
BPR Audit Pty Ltd 2023 14:45 GMT+10

Bernie Rohan  
Director

BPR Audit Pty Ltd  
(Authorised Audit Company)  
Reg. No. 311673  
G03, 12-14 Cato Street  
Hawthorn East VIC 3123

Dated: Aug 24, 2023



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