



American Evaluation Association

Strategic Plan

Effective Date April 1, 2015

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Mission, Vision & Values

Preamble

The American Evaluation Association seeks to act in ways that embody our mission, vision, and values in pursuit of our defined policies and goals.

MISSION: The American Evaluation Association’s mission is to improve evaluation practices and methods, increase evaluation use, promote evaluation as a profession, and support the contribution of evaluation to the generation of theory and knowledge about effective human action.

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

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

- i. We value high quality, ethically defensible, culturally responsive evaluation practices that lead to effective and humane organizations and ultimately to the enhancement of the public good.
- ii. We value high quality, ethically defensible, culturally responsive evaluation practices that contribute to decision-making processes, program improvement, and policy formulation.
- iii. We value a global and international evaluation community and understanding of evaluation practices.
- iv. We value the continual development of evaluation professionals and the development of evaluators from under-represented groups.
- v. We value inclusiveness and diversity, welcoming members at any point in their career, from any context, and representing a range of thought and approaches.
- vi. We value efficient, effective, responsive, transparent, and socially responsible association operations.

Background/Development Process

History:

Throughout 2014, the Board of Directors engaged in a series of strategic discussions which included the examination of data, trends, and other environmental scan information. The Board first concluded on re-written and re-organized Ends Goals statements that reflect the overall strategy for the organization. Then the Board reviewed analysis of how the current offerings/programs matched up with the intent of the Ends Goals. The Board also discussed priorities that would drive a multi-year approach and budgeting. The Board's work does not end with the publication of this Strategic Plan. The Board will continue to monitor the organization's progress towards implementation of the plan and monitor any changes in the landscape that might impact the plan itself or require adjustments.

Policy Based Governance Statement:

AEA has adopted a version of Policy Governance as an organizational governance approach. This approach defines the relationships between an organization's members/stakeholders (referred to as owners in Policy Governance terminology), its board of directors and management. Explicit policies and management limitations are components of the organization's Policy Manual and define authority and accountability for all parties involved in the organization. A primary function of the leadership of an organization is to set the course for the strategy through the articulation of the Ends Goals; the primary function of the management is to execute the strategy in the form of development and implementation of programs and products that fulfill the strategic direction. The board then monitors management for the successful progress towards the strategic ends.

Multi-year Planning Priorities:

The Presidential Rotation (President, President-Elect, Past-President) presented the following priorities to the Board at their October 2014 to drive the strategic planning process and ultimately a multi-year budgeting process:

- Professional Development of Evaluators
- Growth in Diversity of membership
- Connecting Evaluation-Related Disciplines

Living Document:

While this strategy reflects the environment, intention, and priorities at the time of its development, the Strategic Plan is meant to evolve over time as the environment changes or goals are achieved. The Board of Directors is committed to this Strategic Plan operating as a guiding document for the organization.

Ends Goals

AEA exists for...**Growth in the effective use of evaluation as a means for enhancement of the public good** (*with results optimizing use of available resources*)

- 1. Evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.**
 - A. A growing body of knowledge advances the theories, practices, and methods of evaluation.
 - B. Evaluators teach and learn evaluation in diverse professional settings.
 - C. Evaluators promote communication with and meaningful use of evaluation by stakeholders.
 - D. Evaluators develop new knowledge about evaluation, and disseminate and transfer it widely.
 - E. Evaluators use a multicultural lens to engage diverse communities in evaluation effectively and with respect, to promote cultural, geographic, and economic inclusiveness, social justice, and equality.
 - 2. Evaluators share and benefit from a sense of professional affiliation.**
 - A. A diverse community of professionals (members and non-members alike) spans culture, discipline, geography, and political philosophy and interacts to promote high quality evaluation practice and use.
 - B. Evaluators are members of an evaluation community that spans culture, discipline, geography, and political philosophy.
 - C. Evaluators develop the capacity of communities and organizations to engage in evaluation.
 - D. Evaluators enrich the life of the association as well as that of other organizations, fields, and disciplines aligned with the association's mission.
 - 3. There is broad growth in the visibility and perceived value of evaluation.**
 - A. Evaluation users will expect and require high quality evaluations.
 - B. Evaluation users encourage understanding and use of evaluation in their settings.
 - C. Evaluation users have knowledge and resources to understand evaluation and make evaluation a standard practice in their organization's operations.
 - D. Evaluation users are sensitive to the cultural and ethical issues that are involved in the conduct and use of evaluation that promotes the public good.
 - E. Evaluation users value evaluation enough to support the profession.
 - F. Potential evaluation users in communities and organizations attend to and learn from evaluation and from each other.
 - G. People in organizations have the knowledge and skills to engage in evaluation.
 - H. People in other professions and disciplines know and respect evaluation theories, practices, and values.
 - I. People outside the field use evaluation as a vehicle for learning and improving their programs and policies.
 - J. The public has knowledge and resources to understand evaluation and use it appropriately.
 - K. The public demand valid information on programs and policies, and are able to understand it.
 - L. The public views evaluation as a profession.
 - 4. Informed policy builds the capacity of communities and organizations to engage in and learn from evaluation.**
 - 5. AEA Members value their membership.**
- Appendix A – Strategic Alignment



CUMULATIVE ENDS GOALS & Action Plan Alignment

Last Update: 5.15

Key: Potential Financial Impact shaded yellow.

Board Focus		Management Focus		Board Focus
ENDS GOALS	Mission Connection	ED Interpretations	Action Plans	Success Indicators
<p>1.0 Evaluators have the skills and knowledge to be effective, culturally competent, contextually sensitive, and ethical professionals.</p>	<p>1. Improve evaluation practices and methods</p> <p>4. Support the Contribution of Evaluation to the Generation of Theory and Knowledge about Effective Human Action</p>	<p>Vision of Success/Outcomes</p> <p>1) Professional Development programs expand in content and delivery options such that AEA is considered the leading source of high quality PD content and delivery. 2) Guiding Principles and Cultural Competency Statements are supported by programs and educational tools that expand the understanding and acceptance by member. 3) Competencies are researched for feasibility for the field of evaluation. 4) AJE and NDE are the primary sources of information about evaluation.</p>	<p>1. Create PD Action Plan to include overhauling AEA's technology approach towards PD delivery (Complete by 1.16)</p> <p>2. Create feasibility Study Plan for Professional Competencies plus recommendations and implications for operations. (Complete by 1.16)</p> <p>3. Overhaul technology through comprehensive plan to enhance website, e-library platform. Increase ease of use, searchability, awareness. (staff/WG. Deadline 1.17)</p> <p>4. Investigate the establishment of a publications committee to sustain journal reputation. (Mngt WG)</p>	<p>1. The current Professional Development opportunities maintain a rating of 4.0 or higher each year.</p> <p>2. PD Action Plan is developed in 2015; implemented for 2016. 60% of survey respondents consider AEA the leading source of PD evaluation content by 2017.</p> <p>2.A. 75% of member respondents report awareness of both documents in the Member Feedback survey. 45% of members report using the documents and educational tools (video/teaching guides) in their practice.</p> <p>(Measurements to be adjusted upon survey results.)</p>

Board Focus		Management Focus		Board Focus
ENDS GOALS	Mission Connection	ED Interpretations	Action Plans	Success Indicators
2.0 Evaluators share and benefit from a sense of professional affiliation.	2. Increase Evaluation Use	Vision of Success/Outcomes AEA is structured (technology, TIGs, Affiliates, programs) so that growth in membership emphasizes diversity and promotes engagement where learning and teaching are inherent in all programs. Members actively communicate with each other through tools and platforms in a way that is energizing, respectful, compelling, innovative and productive.	1. Social Media Action Plan - including website community engagement (Roosendaal/MCS/WG 1.15)	1. 10% of new members are generated first through Affiliate contact by 2016.
	3. Promote Evaluation as a Profession		2. Affiliate/TIG Engagement Action Plan (Roosendaal/Admin/WG 12.15)	2. 75% of TIG leaders report feeling engaged and consulted by AEA management by 2016.
			3. Membership Development plan (Admin/WG Complete.1.15-3.15)	3. New membership for targeted audiences increases by 20%.

Board Focus		Management Focus		Board Focus
ENDS GOALS	Mission Connection	ED Interpretations	Action Plans	Success Indicators
3.0 There is broad growth in the visibility and perceived value of evaluation.	2. Increase Evaluation Use	Vision of Success/Outcomes AEA expands communication on its policy statements in a way that enhances understanding by businesses and non-profits on the use of evaluation, both domestically and internationally.	1. Research feasibility of a targeted "What is Evaluation?" Campaign OR other strong PR type presence/plan. (FY 2017)	1. Proxy measurements for employer understanding of the role/importance of evaluation: Requests for use of Career Center, requests for evaluation policy assistance. (Measurements to be developed.)
			2. Investigate viability of collecting external statistics on evaluation usage.	

Board Focus	Board Focus	Management Focus	Board Focus	
ENDS GOALS	Mission Connection	ED Interpretations	Action Plans	Success Indicators
<p>4.0 Informed policy builds the capacity of communities and organizations to engage in evaluation.</p>	<p>4. Support the Contribution of Evaluation to the Generation of Theory and Knowledge about Effective Human Action</p>	<p>Vision of Success/Outcomes 1) AEA initiates a collaborative approach in linking with external organizations and reaching out to various stakeholders to impact policy and usage of evaluation. 2) AEA is a clearinghouse of information on policy statements and information about evaluation both domestically and internationally.</p>	<p>1. Act on recommendations of Cross-Discipline TF (Staff/TF. Deadline 12.15)</p> <p>2. Pursue Int'l WG partnerships programs focused on organizational & policy connections (Complete by 12.15)</p>	<p>1. 10% of total AEA conference attendance and PD program registration originate from another similar organization.</p> <p>2. International membership increases by 10% by 2016.</p>
<p>5. AEA Members value their membership.</p>		<p>Vision of Success/Outcomes AEA's membership is engaged and aware of AEA's programs, products and services. The PD programs are well attended and evaluated as valuable. AEA is reaching a highly diverse population with its membership message.</p>	<p>1. Membership Growth and Engagement Action Plan (Roosendaal/WG) to reflect Board Growth Discussion.</p>	<p>1. Achieve 70 % of members surveyed who indicate AEA membership as valuable.</p> <p>2. 20% of membership consider themselves highly engaged in AEA.</p> <p>(Measurements to be adjusted upon survey results.)</p>



Current Program/Product Map to Ends Goals

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

- a. A growing body of knowledge advances the theories, practices and methods of evaluation.
- b. Evaluators teach and learn evaluation in diverse professional settings.
- c. Evaluators promote communication with and meaningful use of evaluation by stakeholders.
- d. Evaluators develop new knowledge about evaluation and disseminate and transfer it widely.
- e. Evaluators use a multicultural lens to engage diverse communities in evaluation effectively and with respect, to promote cultural, geographic, and economic inclusiveness, social justice and equality.

	Conference	Prof Development*	EPTF	Cultural Competency	Guiding Principles	TIGS	GEDI	MSI	Affiliates	Journals	Website**	aea365	Social Media	Find an Evaluator	Int'l Partners	Awards	Building Bridges
a.				●	●					●					●		
b.				●					●	●					●		
c.			●			●					●						
d.	●	●				●	●	●		●		●	●		●		●
e.		●		●			●	●							●		

2. Evaluators share and benefit from a sense of professional affiliation.

- a. A diverse community of professionals (members and non-members alike) spans culture, discipline, geography and political philosophy and interacts to promote high quality evaluation practice and use.
- b. Evaluators are members of an evaluation community that spans culture, discipline, geography and political philosophy.
- c. Evaluators develop the capacity of communities and organizations to engage in evaluation.

a.	●	●		●	●	●	●	●	●	●	●	●	●		●		●
b.	●	●		●	●	●	●	●	●	●	●	●	●		●		
c.	●	●		●		●	●	●	●	●	●	●	●		●		



- h. People in other professions and disciplines know and respect evaluation theories, practices and values.
- i. People outside the field use evaluation as a vehicle for learning and improving their programs and policies.
- j. The public has knowledge and resources to understand evaluation and use it appropriately.
- k. The public demand valid information on programs and policies and are able to understand it.
- l. The public views evaluation as a profession.

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

5. AEA Members value their membership.

	Conference	Prof Development*	EPTF	Cultural Competency	Guiding Principles	TIGS	GEDI	MSI	Affiliates	Journals	Website**	aea365	Social Media	Find an Evaluator	Int'l Partners	Awards	Building Bridges
			●	●	●	●		●		●	●	●		●			
			●				●	●		●	●						
			●														
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			●							●	●				●		
	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●

*Professional Development includes:

- Summer Institute
- coffee breaks
- e-learning
- Eleanor Chelimsky Forum Video Project/RWJF

**Website

Includes all elements of the website not broken out here including e-library

●	=	Believed to currently align to the Ends Goals
●	=	Believed to have potential to align with Ends Goals

Feedback on Sustainability for Impact on: Concentrations of substances from the earth’s crust; Concentrations of substances produced by society; Degradation of nature; and also People’s wellness; People’s influence; People’s competence; Equity for people; Meaning for people. All of these inform our understanding of the sustainable “Public Interest” or “Human Flourishing.”

