

# Evaluation Policy Task Force (EPTF) Charge

## Purpose

The Evaluation Policy Task Force (EPTF) is a standing advisory body that provides current insights and recommended actions to the AEA Board of Directors on matters of evaluation policy across the United States within federal, state, and local government; tribal; and philanthropic<sup>1</sup> contexts. The EPTF serves as a strategic thought partner to the Board, helping AEA interpret, anticipate, and respond to developments in evaluation-specific policies that affect the field and its members.

Evaluation policy is defined here as “...any rule or principle that a group or organization uses to guide its decisions and actions when doing evaluation” (Trochim, 2009, p. 16)<sup>2</sup>.

In the current policy environment—marked by significant shifts in federal priorities, reduced evaluation capacity within government and its funded entities, and increased risks to evaluators and evaluation data across a wide range of contexts—the EPTF plays a vital role in advancing AEA’s mission to promote high-quality, ethical, and equitable evaluation practice. Expanding the EPTF’s scope from the federal government to include state and local government, tribal, and philanthropic contexts strengthens AEA’s ability to support evaluators working across diverse systems.

The EPTF’s work directly aligns with the following AEA Strategic Priorities:

- #1 - Understanding our market: Evaluation policies often signal important ways we can support individuals who are evaluators, strive to become evaluators, or interact with evaluation in another way. For example, having a solid understanding of what was being asked for in terms of evaluation capacity building plans through the implementation of the Evidence Act provides an important signal about what is on the horizon in terms of evaluation market “needs” in this space.
- #2 - Promoting standards of professional practice: The EPTF has historically reviewed evaluation policy language, memos or federal register notices that speak about evaluation policies and their implementation and drafted written statements for the Board’s consideration that spoke to how the evaluation policy or its implementation could include/align better with the professional standards and guidance that AEA has developed. Additionally, the *Roadmap for a More Effective Government* (an EPTF product) promotes/aligns with AEA guiding principles, evaluator competencies, etc.

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<sup>1</sup> “Philanthropic” context or sector as used throughout this document is inclusive of non-profit organizations and foundations.

<sup>2</sup> Trochim, W.M.K. (2009). Evaluation policy and evaluation practice. In W.M.K. Trochim, M.M. Mark, & L.J. Cooksy (Eds.), *Evaluation policy and evaluation practice. New Directions for Evaluation*, 123, 13-32.

- #5 Providing Value through Partnerships: Strengthening relationships with a broad range of existing and potential partners to promote shared learning (about and from evaluation policy) and advocacy.
- #6 Delivering on diversity and equity commitments: Ensuring that evaluation policy advances equitable access and protects evaluators and communities from harm.
- #7 Engaging with members and with the community at large: Elevating evaluation's role in democratic governance and public accountability.
- #9 Advocating for evaluation in government: Sustaining the momentum established under the Evidence Act (2018) by promoting evaluation as a public good.
- #10 Ensuring our operational infrastructure and leadership model is fit for purpose: Building the EPTF's capacity to operate strategically, transparently, and collaboratively within AEA's governance structure.

## Scope and Objectives

1. Maintain the *Roadmap for a More Effective Government* (Roadmap)
  - a. Review the current Roadmap for opportunities to update in a manner that reflects the current landscape and aligns with current AEA strategic priorities or historical documents. The Roadmap should be updated every five years (at a minimum) to maintain its relevance to the field.
  - b. Conduct engagement activities with the AEA Board, members, and external groups to identify new priorities and updates to the current Roadmap.
2. Monitor Evaluation Policy Gaps and Opportunities
  - a. Monitor and analyze current and emerging federal, state, and local governmental, tribal, and philanthropic sector policies that affect evaluation practice, evaluation capacity, and access to data with potential for use in evaluations.
  - b. Advise the AEA Board on potential organizational responses to evaluation policy developments, including opportunities for nonpartisan education, collaboration, or advocacy.
  - c. Coordinate with new and existing internal and external partners (e.g., Data Foundation, APPAM, TIGs, local affiliates, universities, public and nonprofit entities) across the U.S. evaluation ecosystem that enable AEA to build effective coalitions in response to the changing evaluation policy environment.
3. Engage and Equip the AEA Community
  - a. Identify opportunities for member participation in evaluation policy dialogue and intentionally flag areas where input is necessary from the AEA member community. With approval from the AEA Board, coordinate with the Executive Director to meaningfully engage AEA members in accordance with the identified opportunities and needs.
  - b. Provide policy updates to the AEA member community through resources created for use by members. These resources should communicate the anticipated and realized impact of federal, state, and local government, tribal, and philanthropic evaluation policy trends to AEA membership.

## Deliverables

- Maintain the *Evaluation Roadmap for More Effective Government*, by updating it every five years (at a minimum), to reflect changes in the evaluation policy environment. Updates should be inclusive of perspectives, changes, and advancements in federal, state, and local government, tribal, and philanthropic contexts.
- Provide approximately quarterly briefings (e.g., meetings, memos) to the AEA Board summarizing key evaluation policy developments and their potential and realized implications for AEA and evaluation practice in the U.S. At a minimum, annually, provide a full report to the AEA Board about annual activities and recommendations.
- Recommend and support potential AEA partnerships, communications, and professional learning that align with needs and opportunities associated with anticipated and observed trends in the evaluation policy landscape.

## Structure and Membership

Membership will include:

- EPTF Chair: Recognized as an experienced evaluation policy professional or scholar from any of the contexts included in the EPTF charge. Minimum of 5 years experience in this space.
- EPTF Members: Experienced evaluation policy professionals from multiple sectors (i.e., federal, state, and local government, tribal, and philanthropic contexts) and evaluation policy scholars. Ex-officio members: Liaison(s) from the AEA Board, entities contracted specifically to support the work of the EPTF, and AEA staff.

## Reporting Relationship

- Must report to: Board of Directors
- All communication between the AEA Board and the EPTF will occur through the appointed Board Liaison(s).
- This charge will be reviewed annually by the Board and the EPTF leadership to integrate changes in scope and language, as needed.

## Term

- EPTF Chair: 5-year term, with option to renew.
- EPTF Members: 5-year non-renewable terms. Option to renew terms for up to two members in order to retain institutional memory.
- Ex-officio members: Term as specified in associated/relevant contract language or bylaws.