

CANADIAN EVALUATION SOCIETY



Annual Report

2006-2007

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Our Strategic Plan

Vision

The Canadian Evaluation Society leads the professional community of evaluators, positioning and building evaluation theory and practice.

Mission

The Society will advance evaluation theory, knowledge and practice through leadership, advocacy, and professional development for members and non-members.

Values

The Society is committed to the following values: propriety, feasibility, utility and accuracy.

Core Businesses

- Leadership
- Knowledge
- Advocacy
- Professional Development

2006-07 Strategic Priorities

- Leadership in moving beyond CES' 25th anniversary in 2006
- Appropriate evaluation professional development initiatives
- Service responsive to members
- Prudent stewardship of CES resources

For more information on the [CES National Strategic Plan](#).

President's Report

FRANKIE JORDAN

Thank you Manitoba Chapter members for a great 2007 conference! The theme, *Culture, Community and Social Justice in Evaluation – Do the Pieces Fit?* was timely and obviously of interest to our members as over 250 were at the conference. CES members, mark your calendar for the 2008 conference in Quebec City May 11th to 14th.

The format of the 2006-2007 Annual Report is a change from past years. It will provide information on each of the four strategic priorities identified by Council for 2006-2007. Key action items and anticipated results are listed on the [CES website](#). Throughout the report you will see references to hyperlinks that will provide you with additional information on the item.

A primary focus for CES National Council this year was the initiation of the professional designation project. You will see references to it throughout this report. The intensive process had an impact on the activities of all three Committees, delaying some of their intended results. But, it also strengthened National's relationship with Chapters by increasing Chapter involvement in a National issue and provided the opportunity for Council to learn to work together more effectively.

Strategic Priority: Leadership in Moving Beyond CES' 25th Anniversary in 2006

CES is always pleased to be able to honour long-standing supporters of evaluation and the Society. At the annual conference in June we inducted Linda Banister into the Canadian Evaluation Society Fellowship. We also honoured Dr. Edward (Ted) Jackson with the 2007 Contribution to Evaluation in Canada [Award](#) and Joan Kruger with the 2007 Service to the Canadian Evaluation Society [Award](#).

This year CES demonstrated its leadership nationally and internationally through its visibility and continuing active role in the [Joint Standards Committee](#), the [International Organization for Cooperation in Evaluation](#) (IOCE) and a tri-partnership among CES National, CES-PEI and the African Evaluation Association (AfrEA). Our representative on the Joint Standards Committee, Jim Cullen, reported an active year with a draft of Personnel Standards 2nd Edition in field trials, and reviews of the Program Evaluation Standards underway. Carl Doucette, the CES representative to IOCE, reported the implementation of the electronic forum for informal discussion among leaders from evaluation associations and the publication of the UNICEF-sponsored book "Creating and Developing Evaluation Organizations: Lessons Learned from Africa, America, Australia and Europe."

Last October CES, university and federal department representatives were invited by the federal Treasury Board to discuss ways to enhance evaluation processes in the federal sector. CES was able to speak to the need for common evaluation competencies and the development of shared evaluation training programs among partners.

CES continues to advocate nationally and locally to promote the Society, the profession and the field of evaluation. In 2006-2007 we undertook a project to further investigate the issue of professional designation. A wide variety of individuals and organizations responded to the request for input into the project. The [Advocacy Ad Hoc Committee](#) and Chapter Executives assisted Council in facilitating Chapter responses.

As well, we took steps to ensure the continuation of the Student Evaluation Case Competition at annual conferences. Following the 2007 Case Competition, National Capital Chapter handed over the Case Competition organizing responsibility they had maintained for many years to the CES National-based [Case Competition Working Group](#), chaired by Bea Courtney.

President's Report (continued)

We also continued to build our relationship with the Canadian Evaluation Society Educational Fund by establishing agreements for events such as the Benefit Auction held at the annual conference.

Strategic Priority: Appropriate Evaluation Professional Development Initiatives

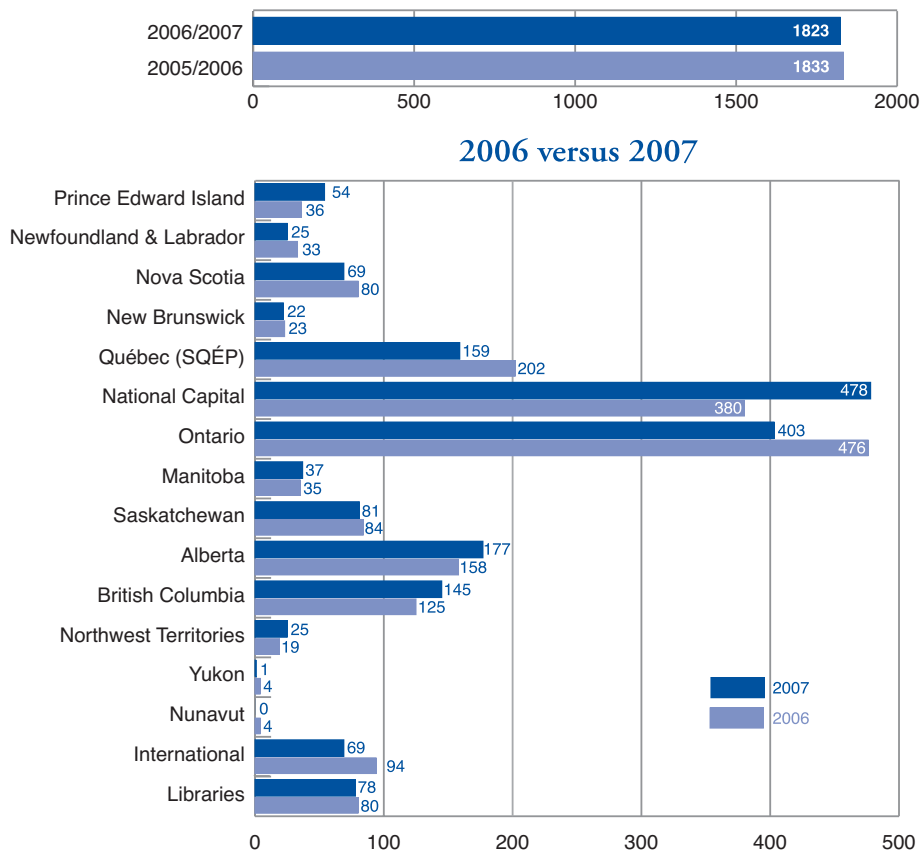
CES National continued its support of professional development initiatives at the Chapter level by working with Chapter members responsible for professional development to produce a renewed professional development policy framework and an evaluation package.

We developed a response to the action plan proposed by the Consortium in the professional designation project. Council considered the steps required, including a discussion of the need for professional development planning.

Strategic Priority: Service Responsive to Members

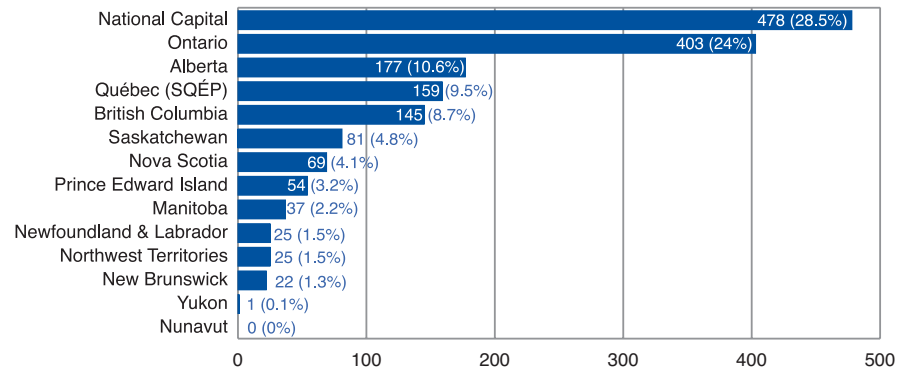
In June 2007 the Society had about 1780 members in 14 Chapters. This is a slight reduction (3%) from the 1833 members in June 2006. CES members represent the multi-disciplinary face of evaluation. The largest membership categories come from Agriculture, Anthropology, Economics and Psychology. The majority of those reporting have a major or primary focus in evaluation and more members have on-the-job and continuing education training than formal academic training.

Membership Statistics by Region/Type



Membership Statistics by Region/Type

Distribution Among Chapters



In 2006-2007 an important component of the CES response to members was the [professional designation project](#) undertaken by CES National Council. A group of well-known Canadian evaluators formed a Consortium and responded to the RFP issued late in 2005-2006. An ad hoc committee consisting of the Member Services Committee and the chairs of the Administration and Professional Development Committees assisted Council by ensuring appropriate processes were in place, including a Town Hall meeting for CES members at the 2007 annual conference, to respond to the report of the Consortium (January 2007) and Council response (February 2007).

Communication with members continues to be strong thanks to our website maintained by Benoît Gauthier, Circum Network Inc., assisted by Annie-Pierre Marchand. Our highly acclaimed Journal continues to be produced regularly thanks to Dr. Bradley Cousins of the University of Ottawa and his editorial team.

Strategic Priority: Prudent Stewardship of CES Resources

Overall, the Canadian Evaluation Society is in a stable financial position. In 2006-2007, new financial procedures improved financial decision-making, fostered greater transparency and enhanced shared accountability in managing finances. An example of this is the policy on [Chapter reimbursement of membership fees](#).

In 2004-2005 CES National Council began a process of reviewing its financial management practices in order to maintain effective and efficient ways to manage CES funds and financial and administrative processes. To obtain the best value for money CES National conducted a Request for Proposals (RFP) for accounting services in May 2006 that led to the selection of the current accountant, a targeted RFP in May 2007 for the selection of a CES Auditor for the current and two upcoming fiscal years and a targeted RFP in April 2007 to select administrative services for the next two years.

In October 2006 CES National Council adopted a Reserve Fund Policy with three main components: Reserve Funds for Dissolution of the Corporation, Reserve Funds for One-time Expenditures and Carry-Forward Funds that may be allocated by Council according to CES financial policy in relation to the yearly budget process or in-year financial management. CES National Council set the minimum Designated Reserve (previously referred to as Members' Equity) at \$100,000. For more information on this policy, contact your CES National Chapter Representative.

In Conclusion

As always, throughout the year the Canadian Evaluation Society has been fortunate to have CES members, including National Council, Chapter Executives and many others, willing to step up and provide expertise and leadership on various issues that arise.

Special thanks go to Carl Doucette, Past President for his mentoring, his advice and his good humour. As well, although it is always difficult to say good-bye, we must bid farewell to Martha McGuire, Jennifer Carey, and Lori Ebbesen in their capacities as Chapter National Representatives and thank Jim Cullen for his work as Member Services Chair as he hands over his responsibilities to Bea Courtney. Thank you, also, to Kathy Jones and her staff of The Willow Group for administrative services.

I look forward to working with all of you in 2007-2008.

Treasurer's Report

SANDRA BOZZO

This Annual Report reviews the Canadian Evaluation Society's activities for the 2006-2007 fiscal year. However, the financial figures in this section are from the 2005-2006 fiscal year as those are the most recent audited statements available. The [audited financial statements](#) for the year ended June 30, 2006 are posted on the Canadian Evaluation Society website.

During 2005-2006 CES had revenues of \$543,005 and expenses of \$321,859, an excess of revenues over expenses of \$221,146. The profit seen in 2005-2006 is largely attributed to two very successful conferences held in that fiscal year. A large market conference held in October 2005 – the CES/AEA Conference in Toronto – resulted in a \$203,592 net profit to CES. As well, the annual CES conference hosted by Prince Edward Island Chapter in June 2006 realized a profit of \$22,277.

Reserve funds, formerly known as Members' Equity, at the beginning of 2005-2006 were \$132,153 and at the end of 2005-2006 were \$353,299.

Chapter Highlights

For information on the Chapter executive members, activities and successes of each Chapter please visit the individual Chapter websites. Links to these can be found on the [CES National website](#).

Alberta

- The Alberta Chapter was very busy this year hosting 14 events and distributing two newsletters.
- The Board has been updating the Chapter by-laws for member approval at the Annual General Meeting in September.

British Columbia

- The BC Chapter was very active this past year and provided networking and professional development on Vancouver Island, in the Lower Mainland, and most recently in the Okanogan.
- The January Annual General Meeting in Victoria elected a slate of 10, including several new officers, and also featured some very successful beer evaluations.

Manitoba

- This year the CES National 2007 Conference, *Culture, Community and Social Justice in Evaluation: Do the Pieces Fit*, held in Winnipeg June 3 to 6 took up much of the time and energy of Manitoba Chapter members. The over 250 registrants provided very positive feedback on the conference. Thank you to Conference Co-Chairs Denise Bélanger and Linda Lee and the Manitoba Chapter members who served on the conference committees.
- Barry Warrack, long-time CES member, Chapter Treasurer and Chapter Representative to National Council, received an award to recognize his service to Manitoba Chapter.

National Capital

- With about 450 members and a sound financial position, National Capital Chapter (NCC) offered professional development events including the Essential Skills Series on three occasions, workshops on Value for Money, RMAFs and Horizontal Evaluations, breakfast sessions and the annual NCC Conference.
- The Chapter continues to be engaged in representing its members on issues such as a Master Standing Offer for Evaluation services with the federal government and professional designations within our Society.

New Brunswick

- New Brunswick Chapter has been very active in networking, in particular with the University of New Brunswick and IPAC.
- Chapter representatives participated in a two-day workshop of a consortium of Universities involving an application of a logic model to research results dissemination, translation and application.

Newfoundland/Labrador

- Newfoundland/Labrador Chapter offered 13 events that provided learning opportunities for over 200 participants in all regions of the province.
- The Chapter contributed to the performance measurement component of an inaugural forum of the Newfoundland/Labrador Policy Network, an initiative of the provincial government.

Northwest Territories

- With an average of 19 members from the Northwest Territories, Nunavut and the Yukon, the Northwest Territories Chapter launched a new initiative called *You've Asked, We've Answered* that provides focused assistance on evaluation to non-government organizations for a nominal fee.
- The Chapter also hosted a successful series of Brown Bag lunch presentations, primarily oriented towards skills-building, and a two-day workshop on program planning and evaluation.

Nova Scotia

- Over the past year, Nova Scotia Chapter offered four workshops to its membership on topics such as community data sources and the use of evaluation in the public sector, and it also hosted a very successful Annual General Meeting.
- The Chapter opened the year with an introductory workshop on program evaluation presented by members of the Chapter executive. This was our second time offering this workshop and it was once again well received.

Ontario

- The Ontario Chapter successfully pilot-tested our newly updated Essential Skills Series in May 2007 and moved the annual provincial conference to the fall 2007 to allow the new board to have more preparation time.
- Our 2006 AGM/CES 25th Anniversary Celebration contest in which organizations submitted their evaluation stories was very successful and will continue in 2007-2008.

Prince Edward Island

- In the aftermath of a very successful 2006 CES annual conference, the PEI Chapter redirected its energies to local activities, including two professional development workshops; the CES Essential Skills Series facilitated by Paul Favaro and a Logic Model Workshop facilitated by Carl Doucette.
- The Chapter also hosted two Wine and Cheese Events with guest speakers.

Saskatchewan

- The Saskatchewan Chapter supported professional development and advocacy by offering three successful events for its approximately 80 members and other interested participants:
 - Survey Research Course;
 - Showcasing Evaluation in Saskatchewan;
 - Program Logic Model Workshop.

Société québécoise d'évaluation de programme (SQÉP)

- At the beginning of October 2006, the SQÉP had 323 members compared to 325 the year before.
- The fifteenth annual SQÉP conference was held at the École nationale d'administration publique (ENAP) in Quebec City, on November 3, 2006. The theme of the conference was "Professionalization: Threat or Opportunity?". 104 participants were able to hear and ask questions of guest speakers: Denise Brosseau, CEO and Secretary of the Ordre des administrateurs agréés du Québec (ADMA); and, Rafika Amira, Senior Policy Analyst at the Treasury Board of Canada. This conference was also an opportunity to grant the Award of Recognition to Hélène Johnson of Laval University to recognize her career in program evaluation.

CES National Council and Standing Committees

For more information on the [CES National Council members](#), and the minutes of the [2007 Annual General Meeting](#).

Executive Committee

Frankie Jordan, President
Francis Remedios, Vice-President
Sandra Bozzo, Secretary-Treasurer
Carl Doucette, Past-President
Chairs of Standing Committees

Administration Committee

Barry Warrack, Chair, CES-MB Chapter Representative
Lori Ebbesen, CES-SK Chapter Representative
Tracey Fiander-Trask, CES-NS Chapter Representative
Cheryl McClellan Moody, CES-AB Chapter Representative

Member Services Committee

Jim Cullen, Chair, SQEP Chapter Representative
Bea Courtney, CES-N/L Chapter Representative
Brigitte Maicher, CES-NB Chapter Representative
Martha McGuire, CES-ON Chapter Representative
Brad Cousins, Journal Editor, *Canadian Journal of Program Evaluation*

Professional Development Committee

Jennifer Carey, Chair, CES-NWT Chapter Representative
Heather Buchanan, NCC-Chapter Representative
Cindy Wood, CES-PEI Chapter Representative
Afton Wright/Reed Early, CES-BC Chapter Representative

Ad Hoc Working Groups

Advocacy
Case Competition
Conference Review Committee
Credentialing Project

Thank you to Council members and all CES members who participated in activities that raised the profile of the Canadian Evaluation Society, the field of evaluation and the profession! Your work has contributed significantly to moving the Society towards its vision of being the professional community of evaluators positioning and building evaluation theory and practice.

A special thanks to the members of the Consortium who donated their time, energy and expertise to the professional designation project (in alphabetical order): Shelley Borys, Benoît Gauthier, Gerald Halpern, Irene Huse, Natalie Kischuk, Keiko Kuji-Shikatani, Robert Lahey, Bud Long, Arnold Love, John Mayne, James C. McDavid, Robert Segsworth.