

Review and update of the CESBCY Strategic and Marketing Plan

2015 November 30

Acknowledgements: First and foremost my thanks to the CESBCY membership who graciously gave their time to participate in surveys and answer questions to provide much needed data for this report. Additional thanks to those members who volunteer their time as a part of the Chapter Executive Committee. It was their decision to allow this project to go ahead in the first place. Thanks to them also for access to the array of files and sources shared. My thanks to Jim McDavid, who was the academic advisor from the University of Victoria, to Wendy Rowe Past President of CESBCY for their efforts in helping to establish the project. A further thanks to Jim and to Bill Reid, the subsequent CESBCY President for continuing to shepherd the project along. A very special thank you to Rebecca Whitley, the CESBCY Secretary who took on the additional responsibilities of providing detailed feedback, being a sounding board for my ideas and concerns, herding cats, and otherwise making this project successful even after I moved to the far side of the planet. Brian McGowan stepped up just as everyone's eyes were glazing over to provide detailed feedback on a prior draft. He was right every time. Finally, in the final days of the development of this report, Sandra Sellick, Diana Tindall, Benoît Gautier, Jane Whynot, and again Rebecca Whitley, took time from their lives to once again vet some erroneous statements and clarify some concepts that were just not gelling for me. I must thank Jim, Wendy, Bill and Rebecca for operating as the steering committee for this project and for coordinating with both the University and the Chapter when appropriate. I hope this is helpful. – Lisa O'Reilly CE.

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Executive summary

The Canadian Evaluation Society (CES, the Society) is a volunteer-driven professional organization. It is structured to include regional chapters whose representatives make up the bulk of its national governing body. In September 2009, CES restructured its chapters, merging members in British Columbia and the Yukon into a single chapter (CESBCY, the Chapter). This transition occurred as a five year Strategic and Marketing Plan (2008 – 2013 SMP) was being implemented.

Initiated in 2011/2012, this report was conceived to provide the Chapter with information useful to update its SMP. Near completion in 2012/2013, the finalization of this report was interrupted following unforeseen delays. Combined with the incoming leadership team’s strongly held vision for the future, the Chapter used the penultimate draft of this report, as well as the associated process of enquiry, to further the discussion of direction and priorities in the intervening period.

This report was finalized in 2015. Much of the information collected for this project remains useful and applicable to the Chapter and to a wider understanding of volunteer-driven professional organizations. It is this information that is the basis for this report.

There were two related objectives for this project: (i) to complete a review of the CESBCY’s 2008-2012 Strategic and Marketing Plan (SMP); and, (ii) provide recommendations to the Chapter for its future strategic planning and ongoing management. These were further delineated into key research questions, each of which is answered below.

What can the CESBCY learn from the literature on effective strategic planning and implementation?

The literature highlights the specific challenges that organizations such as the CESBCY –volunteer run nonprofit, professional organizations – face when developing and implementing a strategic plan, and the related challenges of managing such an organization.

The pre-eminence of the volunteering member is essential to understanding CESBCY’s collective capacity, and its goals and objectives. In volunteer run professional organizations, members are “the legitimating body, contributors, volunteer members, clients of services, and beneficiaries of public goods provided by the association” (Schwarz, 2005).

Volunteering members, particularly those in leadership roles “[must] pay close attention to motivation and managing [volunteer] members to ensure that tasks essential to organizational survival are accomplished, (Bettencourt, Dillman, & Wolman, 1996 and Harris 1996). At the same time, and herein lies the challenge, volunteers have few levers with which to motivate each other, and volunteering members do not generally expect to be managed, controlled, monitored, or subjected to the norms or hierarchical bureaucratic structures (Rothschild-Whitt, 1979).

A volunteer professional association faces specific challenges, separate from other nonprofit organizations. Volunteers and other members have professional standards in their own working life, which they may

assume will be replicated in their own professional association. At the same time, peer managed, volunteer organizations operate with a different decision-making structure that is highly democratic and consensus-based. The time needed for decisions and the pace of effort in a volunteer run association is slower than in paid, professional work space. Volunteers' time is more limited and may produce a less polished, more conversational outputs than in their work places. Volunteer professional associations should anticipate a tension between expectations of paid, professional work and the capacity and time limited effort inherent in volunteer organizations. Managing these tensions poorly can lead to volunteer time and effort being under appreciated, limiting the recognition and support for volunteers.

The literature tells us volunteers may leave if they aren't completely satisfied with their experience, (Oropesa, 1995 as cited by Harris, 1998). *Completely satisfied* is a very high bar to meet. The loyalty of volunteers is an ever-present concern for an association dependant on their capacity, and availability. Understanding each other's motivation may be helpful. Within professional associations volunteers are most likely to be influencers, helpers, community oriented, success focused, or some combination thereof (Wilson, 2012, p. 180). As goals are developed care must be taken to identify existing and potential volunteers who could reasonably be expected to undertake the associated activities. Priorities may need to change to accommodate the capacity of those who come forward to volunteer. Further, there are good metrics by which to gauge successful nonprofit Boards of Directors (Herman and Renz (2000), for what makes a good strategic plan, how a nonprofit should plan strategically Bryson (2004), and ideas on how to match volunteers to the needs of the Chapter. These are all available and applicable to CESBCY.

Had the environment changed?

The Chapter's operating environment changed slightly from that in 2007/2008. Within BC and the Yukon there are pockets of an evaluation-supportive culture. There are still no territory-wide or province-wide evaluation policies or requirements for evaluation, but there are some isolated initiatives. Other activity levels indicate that the community of practice in British Columbia and the Yukon has a foundation on which to grow, notably in health care authorities, universities, granting foundations, nonprofit organizations, a few government organizations, independent evaluators, and evaluation consulting firms. The online presence of the Chapter's website and social media presence increased the breadth of the Chapter's reach. At the same time in person meetings provided, and continue to provide, opportunities for deeper connections through increased networking, shared learning, knowledge transfer, and identification with CESBCY. This increased breadth and depth provides a foundation for an evaluation community of practice.

There is a consistently stronger evaluation culture in the federal government, although the evaluation function has been troubled in recent years. The federal *2009 Policy on Evaluation* was implemented, and later evaluated. The report was produced by the *Centre of Excellence for Evaluation*, in collaboration with Natalie Kishchuk, CE, of Program Evaluation and Beyond Inc. and Benoît Gauthier, CE, of Circum Network Inc.. Federal evaluation budgets shrank slightly, as did the number of federal evaluators. Combined, the result was more evaluation coverage with fewer people and smaller budgets which led to evaluation

strategies that were “economical but served a narrower range of users’ needs.” At the federal level, the constraint on evaluation is not a lack of policy imperative, but rather of resource and capacity limitations. The recent (2015) federal election will undoubtedly impact on evaluation at the federal level, although it is too soon to determine how.¹

The Society as a whole underwent significant changes and added a wide array of programs and benefits. The CES Professional Designations Program was established in 2010; 35 CESBCY members have acquired their Credentialed Evaluator designation (of 299 CEs in Canada). A national mentoring program was established by a grassroots organization, with support from CESBCY and its members. The grassroots group negotiated with CES in 2015 to take over the ongoing management of the mentoring project. Currently the now CES-managed mentoring program has been renamed the *CES Mentoring Initiative (pilot)*. CES adopted the Program Evaluation Standards developed by the Joint Committee on Standards for Educational Evaluation. The Society provided financial support to both the Consortium of Universities for Evaluation Education (start-up funding), and the CES Education Fund (ongoing support). CESBCY volunteers undertook a huge range of activities, described in greater detail below.

Most recently, the Chapter hosted two sold out regional conferences (2014 and 2015). Moving forward, the Chapter committed to hosting the 2017 CES National Conference in Vancouver.

Did the five goals continue to resonate with and across the membership? Were any changes to these goals sought by the membership?

The goals in the SMP are:

1. BC and Yukon evaluation stakeholders belong to a Community of Practice.
2. BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.
3. CESBCY has the organizational capacity to achieve the other goals.
4. CESBCY is seen as the leader of the BC and Yukon evaluation community of practice, representing all sectors and stakeholders across the province.
5. Evaluation makes a positive contribution to decision-making in BC and the Yukon.

By and large the goals resonated with the membership. Members offered suggestions for the future; in order of most frequently suggested, those not yet complete are:

- letting go of the local coordinators in favour of collective events planning,
- use of teleconference or webinar tools to organize and host events,
- more frequent and more open communication with non-volunteering members,

¹ Campaign promises included reinstating the long-form census, use of evidence-based decision making in a program review and elsewhere, increased public access to information, accelerated and expanding open data initiatives, the establishment of performance standards, gender impact assessments, etc. that could affect evaluators and the use of evaluations, (Liberal Party of Canada, 2015).

- develop events based on a needs assessment
- tie events to the credentialing needs,
- focus specific effort on member and volunteer recruitment and retention, and
- report annually on the Chapter's goals and objectives.

Which activities had the Chapter undertaken? What successes had been achieved by the Chapter?

The most significant effort undertaken by the Chapter under the SMP was to host the 2010 CES National Conference in Victoria (May 2-5, 2010). Despite fears of low turn-out and financial losses during an economic downturn, the Conference attracted 422 registrants and was a financial success. The website was updated significantly (twice), improving member engagement and visibility. Between 2009 and 2013, the Chapter promoted or hosted 155 training and networking events, 72 of which were offered by the Chapter directly. The Chapter increased its reach four times, starting with 145 members, and reaching nearly 600 members and non-members by 2012/2013.

The Chapter identified 53 desired actions for themselves in the SMP to achieve the five goals. As of 2012/2013, more than half were completed and nearly twenty percent were partially complete. For an all-volunteer effort the sheer volume of good work done must be acknowledged and should be celebrated. Beginning with few volunteers, little engagement, and few financial resources in 2007, the Chapter marshalled significant volunteer efforts to achieve many of its goals, making progress on others.

What barriers had the Chapter faced? Were / how were these overcome?

The Chapter used an array of strategies to reach a dispersed membership, including online tools, social media, and email blasts from within the updated website.

Volunteer capacity and its limits were a challenge. Some areas of expertise (nonprofit and privacy laws, volunteer management, and to an extent event planning) were underrepresented among volunteers. Without a volunteer specifically identified to undertake and further define advocacy, in particular the Chapter's desire to see of provincial or territorial evaluation policy, the efforts stagnated. The 2010 Conference strained many of the Chapter's volunteers. The Chapter worked to thank and acknowledge its volunteers, but experienced some gaps on this front. A minority of core volunteers, conference volunteers, and ad hoc volunteers were unrecognized; the names of some not recorded, while others were simply forgotten.

Was the SMP a useful tool for Chapter management and planning? How could CESBCY know it was successful? Were the progress measures used? Did the progress measures capture successes and challenges accurately?

Volunteer members varied greatly in whether they used the SMP or not. Some (newer volunteers) had never read the document while others read and refer to hard copies of the document in an ongoing fashion. There was no evidence that the Chapter uses the SMP collectively for annual planning or

reporting to members. Nonetheless, the Chapter regularly reported on a number of the performance indicators included in the plan.

Recommendations

First and foremost thank and congratulate the volunteers for the significant efforts undertaken and successes achieved in support of the goals reflected in the Strategic and Marketing Plan, and the Chapter generally. Volunteers can never be thanked too often.

The Chapter has committed to hosting the 2017 CES National Conference. Conference organizers have many resources on which to draw, including evaluation reports of past conferences, and the corporate memories of past or existing volunteers. The SMP and this report should be shared with those volunteering to organize the 2017 Conference so that they may be briefed on the other supporting activities the Chapter undertook in advance of the 2010 Conference.

Further, the Chapter should encourage a subset of volunteers to focus their efforts on goals and activities unrelated to the conference which extend past the conference dates. This will mitigate the known risk of volunteer burnout and prevent the crashing halt to momentum generated by the conference.

A summary of the recommendations are listed here. Additional detail on these can be found in the body of the report.

- Member services - The Chapter should continue to share these notices of other organizations' events whenever possible. CESBCY events and other efforts should (continue to) clearly enunciate which of the CES Core Competencies are addressed.
- Transparency - Share agendas, minutes, reports, and volunteering opportunities – particularly in frequent, small bursts which provides transparency for the Chapter to its members and potential members/volunteers.
- Communities of evaluation of practice - Continue to offer events frequently enough that newly established relationships can be maintained. The Chapter is encouraged to continue its focus on the whole of the evaluation community in BC and the Yukon, inviting the participation and interest of non-members. Serious consideration should be given as to whether non-member contacts should or could be encouraged to become full members of the CES.
- Advocacy - the Chapter should discuss whether and how to proceed with advocacy for provincial evaluation policy and awareness.
- Volunteer management - Volunteer recruitment, management, ongoing support, and appreciation are the foundation of CESBCY's success. There are specific recommendations for the Chapter on recruitment, orientation, scope of effort, support and recognition, and reflection.
- Strategic planning - The Chapter's achievements under the 2008 – 2013 Strategic and Marketing Plan are more than significant. The Chapter is highly encouraged to develop a new five year strategic plan. This project identified potential goals and indicators that can support the new

strategic plan on membership, national events, local events, volunteers, and measures that support the developing community of practice through increased transparency of Chapter meetings and decisions.

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Acronyms and abbreviations

AGM	Annual General Meeting
BC	British Columbia
BoD	Board(s) of Directors
CASE COMP	CES Student Case Competition
CE	Credentialed Evaluator
CEC	Volunteer Chapter Executive Committee
CES	Canadian Evaluation Society
CESBC	CES British Columbia Chapter
CESBCY	CES BC and Yukon Chapter
CESEF	CES Education Fund
CJPE	Canadian Journal of Program Evaluation
CMWG	Core Mentoring Working Group
COC	Conference Organizing Committee
CUEE	Consortium of Universities for Evaluation Education
DMHR	Deputy Ministers Human Resource Committee
EMC	Evaluation Mentoring Canada
ESS	Essential Skills Series
FREP	Forest and Range Evaluation Program (BC)
Gs&Cs	Grants and Contributions
HA	Health Authorities (BC)
IDRC	International Development Research Centre
JCSEE	Joint Committee on Standards for Educational Evaluation
LDAs	Federal Large Departments and Agencies
LM	Lower Mainland
NPOs	Nonprofit ² organizations
PDP	Professional Development Program
PSC	Public Service Commission (Yukon)
RSS	Rich Site Summary (aka Really Simple Syndication)
SMP	Strategic and Marketing Plan
SWOT/SWOC	Strengths Weaknesses Opportunities Threats/Challenges
TBS	Treasury Board Secretariat (Federal)
ToR	Terms of Reference
UVic	University of Victoria
VP	Vice President

² Note: different authors use not-for-profit, nonprofit, notprofit, and nonprofit organizations (NPOs) to refer to a single idea. For the purpose of this report, no one term is more or less accurate than the other. This author uses 'nonprofit'. Where quoted or in document titles, the original authors' preferred term is maintained.

Report

Introduction

The Canadian Evaluation Society (CES, the Society) is a volunteer-driven professional organization. It is structured to include regional chapters whose representatives make up the bulk of its national governing body. In September 2009, CES restructured its chapters, merging members from British Columbia and the Yukon into a single chapter (CESBCY, the Chapter).

This restructuring came near the first full year of a Strategic and Marketing Plan (SMP) 2008 – 2013 previously developed within the then British Columbia chapter. Between 2009 and 2011, Chapter members worked pro-actively to reflect this new change in the day to day workings of the CESBCY, but did not formally amend the 2008 – 2013 SMP.

While discussed and planned for in general terms by members of the CESBCY volunteer Chapter Executive Committee (CEC, volunteer executive) the timing and scope of this project were proposed by the author³ so that she might both support the Chapter and complete this effort as her final project in her Master's in Public Administration at the University of Victoria.⁴ Initiated in 2011/2012, this report was conceived to provide the Chapter with information useful to structure amend its 2008 – 2013 SMP.

The project experienced unforeseen delays. In the intervening period, the Chapter used the penultimate draft of this report as well as the associated process of enquiry to further the discussion of direction and priorities. Combined with a strong vision held by the incoming leadership team, the Chapter continued to pursue its mission that it, "will work to increase the profile and use of evaluation by engaging and supporting the evaluation community in BC and the Yukon."

The report was finalized in 2015. Some information collected for this project had a relatively short shelf life and has been consigned to appendices. Other data and analysis remains relevant and applicable to the Chapter and to a wider understanding of volunteer-driven professional organizations. It is this information that is the basis for this report.

Project objectives

There were two related objectives for this project:

- to complete a review of the CESBCY's 2008-2012 Strategic and Marketing Plan (SMP); and,

³ The author came to this project with multiple roles: an evaluator, she has been a member of CES since 2002. She is a long-time volunteer with the CES and was a member of the CEC both when the SMP was developed and at the time this project was initiated. She received her Credentialed Evaluator (CE) designation concurrently to the development of this report. She had pre-existing professional and social relationships with many people involved in this project; the steering committee and most of the consulted CEC, many of the Chapter members, and a number of its other contacts. Many of these people have similar prior and ongoing relationships with each other. By means of full disclosure, her history with the CES is included alongside the Chapter timeline included in Appendix A of this report.

⁴ This report is the substance of the author's final project in that program. (For information on the program at UVic, please see <http://publicadmin.uvic.ca/>).

- provide recommendations to the Chapter for its future strategic planning and ongoing management.

Developed in collaboration with the CESBCY steering committee, the specific research questions answered are as follows:

1. What can the CESBCY learn from the literature on effective strategic planning and implementation?
2. Had the environment changed?
3. Did the five goals continue to resonate with and across the membership? Were any changes to these goals sought by the membership?
4. Which activities had the Chapter undertaken? What successes had been achieved by the Chapter?
5. What barriers had the Chapter faced? Were / how were these overcome?
6. Was the SMP a useful tool for Chapter management and planning?
 - a. How could CESBCY know it was successful? Were the progress measures used?
 - b. Did the progress measures capture successes and challenges accurately?

Project governance

The project was overseen by an academic advisor from the University of Victoria, Jim McDavid, and volunteer members of the CEC: CESBCY Presidents Wendy Rowe, then later Bill Reid, and the then CESBCY Secretary, Rebecca Whitley. This group operated as a project steering committee for the project as the goals and research questions were developed, as the data collection methods were decided upon, and were available throughout the data collection and early analysis of this report. These individuals also supported coordination with both the University and the Chapter when appropriate. Additionally, volunteer members of the CEC, notably Brian McGowan and Sandra Sellick, provided significant comments and support on drafts of this report.

Methods and timing

A literature review began in 2011 to provide context and structure to the project. Primary data collection began in 2011 with a member survey of CES members in British Columbia and the Yukon. This was compared to data from a 2007 survey of British Columbia members that was previously conducted and analysed by Chapter volunteers. The initial analysis of that data was shared with the CESBCY executive and other Chapter members in late 2011.

Additional primary data collection and analysis continued, including consultation with then-current and past volunteer members of the CEC, a review of internal documentation, and targeted online research. Where possible the methods used for this review and update were similar to those used to develop the 2008-2012 SMP, thus allowing for comparisons as appropriate. Individual data collection reports are included in Appendix B 'Collected data'.

In July of 2012, the author moved abroad anticipating no interruption to the completion of this project. By that time, all data collection had been completed, the results of the survey and of the literature review had been reviewed with the volunteer members of the CEC, and analysis and discussion of findings had begun, as had the drafting of this final report. In 2013, a penultimate draft was shared with the project steering committee; comments were received and integrated into the report.

At this late stage the project was interrupted. There were a number of factors that contributed to this: the distance and difficulty in coordinating and communication with the project client and project supervisor, significant limitations on access to functioning technology to support communications, communication breakdown and confusion between the parties involved resulting from these limitations, and a series of security related issues that were specific to where the author was living.

In 2015, the effort was reinitiated so that this report may be finalized. Additional feedback and support was provided by the current CESBCY volunteer executive and academic advisor leading to this completed report. Other members of the Society offered time to vet additional details.

Structure of this report

The body of the report begins with a reflection on what the CESBCY can learn from the literature on effective strategic planning and implementation for similar organizations.⁵ This is followed by a description of the Chapter and the context in which it operated in 2007/2008 when the SMP was drafted and a comparison to the data collection period in 2011/2012.

The challenges that faced the Chapter in 2007/2008 are summarised as are details of how the environment had changed between then and 2011/2012. This is followed by an assessment of the progress that the Chapter made implementing the SMP. This is where findings related to the barriers faced by the Chapter are included, along with whether and how these barriers were overcome.

A look at the strategic management of the Chapter follows. This section addresses whether the SMP was a useful tool for ongoing management and planning within the Chapter, how CESBCY knew about its successes, were the measures being used, and were the progress measures capturing successes and challenges accurately? A summary of the 2011 members' feedback on the relevance of the five goals set in the SMP is also presented, including their thoughts on potential changes to these goals.

To this point, the paper focuses on the data collected as part of the 2011/2012 effort. Some additional information on the Chapter's 2015 context is presented next.

These sections are followed by conclusions and recommendations for CESBCY.

⁵ A complete literature review is included in Appendix B - Collected data.

Appendices attached include (A) timeline information, (B) collected data, which contains a summary of data collected by method, and (C) the performance framework from the SMP with comments on progress evident by 2011/2012 and updated in 2015.

Communication

This report, its findings and recommendations to the CESBCY volunteer chapter executive, are provided here for review and dissemination to members through any means that the Chapter deems appropriate. The Report will also be provided to the School of Public Administration at the University of Victoria to be distributed according to the School's existing practices. It is anticipated that this report will be made public, to be freely referenced with appropriate citations.

Lessons from the literature

A literature review was undertaken to identify what the CESBCY could learn related to effective strategic planning and implementation, and how a volunteer-managed organization (in particular, a nonprofit, professional association⁶) can match capacity and interests of the volunteers with the expressed needs of the organizations.⁷ The complete literature review is included in Appendix B - Collected data; essential highlights are included here.

The CES, including its chapters, is a *volunteer-run nonprofit, professional association*. Within the literature similar organizations were identified. For the purposes of this report, these organizations are defined as *collections of professionals with a shared understanding of the association, who have joined together for varying degrees of time to achieve goals and outcomes beyond the capacity of a single individual*.

The CES and similar organizations are governed by volunteer-members who use formal rules and informal practices to support each other and the participation of other stakeholders. Paid staff are managed by volunteer-members and play a supporting role the volunteer-members. This distinction, that paid staff answer to volunteer-members, impacts on the day-to-day management and the longer term planning of volunteer-run nonprofit, professional associations, (Harris, 1998).

There is no one standing theory on how a volunteer run, nonprofit, professional association can or should run. There are no universally applicable theories for nonprofits generally, (Kreutzer, 2009) and theories related to volunteer associations are rare, (Schnurbein, 2009). That said - we can identify some theoretical guidance. Combining democratic perspective on governance and stakeholder theory provides insight by allowing use of relevant aspects of each theory. As a result we can find that: (i) the contexts and specific

⁶ The CES and its chapters refer to themselves as a *society*. The literature most often refers to similar organizations as professional *associations*. For the purposes of this report, these terms are understood to be equivalent and are used interchangeably.

⁷ The Literature Review was prepared as a separate, stand-alone document. This was shared with, and commented upon by, the CESBCY and the academic adviser from the University of Victoria. Comments were incorporated and the entire, updated literature review is included in Appendix C of this report.

interests of professional association members vary; (ii) the professional association operates in an ecology of organizations; and, (iii) it is outward facing, with an impact outside the membership (Kreutzer and Jacobs, 2011, Milofsky, 1998, O'Neill, 1994). In a hybrid theory our member-volunteers must both represent the diversity of interests of the professional association members to each other, and negotiate and resolve the potentially conflicting interests of different external stakeholder groups (Cornforth, 2003, and Freeman, 1984). These characteristics can be seen in the CESBCY and its volunteer executive.

As defined in this literature review, strategic planning is "a disciplined effort to produce fundamental decisions and actions that share and guide what an organization ... is, what it does, and why it does it" (Bryson J. M., 2004, p. 6). For volunteer associations, planning strategically has the added consideration of the variability in the current and future volunteers' skills and capacity, alongside its financial resource decisions. Parent (1988) suggests professional associations should strive for "a workable level of unity and understanding among members who are widely dispersed" (p. 346). As goals are developed care must be taken to identify existing and potential volunteers who could reasonably be expected to undertake the associated activities. Priorities may need to change to accommodate the capacity of those who come forward to volunteer.

There are a number of characteristics in the literature about what makes a good strategic plan:

- A good strategic plan describes a single, consistent vision for the organization, representing the concerns of internal and external stakeholders. For our purposes, that would include the long term and the episodic volunteer-members, the non-volunteering members, paid staff, and non-members impacted by the Chapter.
- The most fundamental issues facing an organization are reflected in a clear description of its purpose, values, and vision of the organization, as well as in the strategies included in the plan.
- It is appropriately resourced. For a volunteer association, this is both a financially viable strategic plan, and one that has realistic expectations on the quality and pace of its volunteer efforts. Appropriate timing is of particular concern in a volunteer-managed organization.
- It responds to external trends that affect the organization and its mission.
- It is action-oriented and has specific plans for implementing strategies.
- It is outcome focused, describing how implementing decisions now will position the organization favourably for the future.
- It includes performance measures and targets, as well as a responsibility to report on progress on goals.
- Perhaps most importantly, a good strategic plan is one that is used by the association to manage changes in critical times.

There are many models on how to develop a strategic plan. It is Bryson's (2004) model that provides the greatest clarity of on how a nonprofit should plan strategically. It has ten steps, each requiring discussion and consensus.

1. "Initiate and agree on a strategic planning process.
2. Identify organizational mandates.
3. Clarify organizational mission and values.
4. Assess the external and internal environments to identify strengths, weaknesses, opportunities and threats.
5. Identify the strategic issues facing the organization.
6. Formulate strategies to manage the issues.
7. Review and adopt the strategies or strategic plan.
8. Establish an effective organizational vision.
9. Develop an effective implantation process.
10. Reassess the strategies and the strategic planning process" (pp. 33-34).

An organization may start or update its strategic planning process at any point. There is no hard and fast rule about when to (re)start the planning process, to (re)formulate goals, to incorporate stakeholder analysis, or to (re)develop a vision. For Bryson (2004), more than half of the ten steps are potential starting points. In addition to step 1, these are: when organizations "find themselves confronted with a new mandate (step 2); a pressing strategic issue (step 5); a failing strategy (step 6 or 9); or the need to reassess what they have been doing (step 10); and that leads them to engage in strategic planning" (p. 52). More simply, an association may need to update its long-range plans if it is not making significant progress, or if it needs to re-think the assumptions that led to the original strategic plan (Baker, 1989).

There are additional considerations unique to volunteer-run, professional associations like the CESBCY. In volunteer associations, members are "the legitimating body, contributors, volunteer members, clients of services, and beneficiaries of public goods provided by the association" (Schwarz, 2005). They are, very nearly, all there is. External stakeholders, who are more rare and whose interests are not be nearly so multi-layered, are all that remain.

The Chapter, like similar volunteer associations found in the literature, is nearly totally dependent on its volunteer-members for its planning, ongoing management, and evaluation. Volunteers' loyalty, capacity, and availability are ever-present concerns for a volunteer association. Volunteer associations benefit from the free time and effort provided, and face the reality that volunteers may leave if they aren't *completely satisfied* with the material, social, or psychological benefits they receive from volunteering (Harris, 1998). *Completely satisfied* is a high bar to reach.

In volunteer associations, there is often a core group of volunteers that complete most of the associations' activities and have developed expectations for the future of the organizations and their own roles in them. Many volunteer associations are under-resourced. If a volunteer-member fails to complete a task, does it poorly, or is not timely about completing it, there may be few others to fall back on for support or to complete the effort. Losing those who remember past rationale, actions, and inactions can be significant;

the smaller the organization, and the more long-serving the volunteer, the more dramatic the loss of an existing volunteer.

Also unique to volunteer-run professional organizations is the reasonable expectation of tensions between the professional standards practiced by members and the basic democratic structures of a peer-managed, volunteer-run organization. Many of the Chapter members function as professionals in their common field, within larger organizations or as contracted professional. Characteristics of volunteer-run organizations, such as the time needed for consensus-based decisions across a varied group of volunteers, and the slower pace of effort in a volunteer run association creates tension between these professional standards and association operations. The literature is unclear how these tensions could be resolved across associations.

Committed volunteer-members with both the time and appropriate skills enhance a volunteer association's reputation. Harris (1998) makes the case that there is a significant need to balance the individuals' skills and expectations with the longer term goals of the organization with which they are volunteering. After all, the long term needs of the association can only be met if there are volunteers interested in working towards the identified goal(s). Volunteers may choose to put effort into areas of most interest to them and/or achievable within their volunteer period. The interests of a few, vocal members may be acted upon in advance of what would otherwise be perceived as higher priorities. How then, to ensure that volunteers continue to contribute to an association? And, how does a small, nonprofit association best match the interests and skills of its members to its long term goals?

The first step is part of the strategic planning process itself, primarily in the discussion and consensus building on major priorities and goals. By ensuring that stakeholder engagement includes the different interest groups within the volunteer association, volunteer members' interests can be incorporating into the goals at the strategy development stage. Ongoing volunteer recruitment and periodic (e.g. annual) changes in volunteer roles is an opportunity to confirm volunteer-members' interests and reinforce shared goals.

Despite the lack of remuneration, volunteers expect a return for the time and effort they commit to their association. Taking the time to know what motivates volunteers is the next step in matching their interests and capacity to the need of the association. Research indicates that volunteer-members in volunteer-managed nonprofit associations have a short list of motivations. Within professional associations volunteers most likely identify in four different ways, which relates directly to the returns that are most important to them:

- influencers – those wanting to make the world a better place, self-identifying as an activist, and are values driven
- helpers – who most see their role as benevolent, compassionate, bringing comfort, understanding
- community oriented – who value communality, loyalty, solidarity, generativity, or

- success focused – wherein occupying positions of trust, leadership, being a good citizen, paying back, taking responsibility, using talents are important self-motivations (Wilson, 2012, p. 180).

Understanding a given volunteer’s motivation and encouraging volunteer-members to understand each others’ interests can support better matching of skills and organizational need, as well as support shared understanding of expectations. What’s more, an ongoing conversation regarding what is important to individual volunteers, how they can successfully contribute and how those relates to the association’s priorities helps to engender the aforementioned and all important loyalty.

Volunteers, particularly those in leadership roles “[must] pay close attention to motivation and managing [volunteer] members to ensure that tasks essential to organizational survival are accomplished” (Bettencourt, Dillman, & Wolman, 1996 and Harris 1996, as cited in Harris, 1998). At the same time, and herein lies the challenge, association leaders “have at their disposal only weak instruments for convincing other members to follow their suggestions... members seem largely motivated to take on voluntary work within associations because of the opportunities it provides for autonomy, self-fulfillment, and expressive relationships (Mason 1995, as cited in Harris 1998)... [and] do not generally expect to be managed, controlled, monitored, or subjected to the norms or hierarchical bureaucratic structures (Rothschild-Whitt, 1979 as cited in Harris 1998, p. 151).

As Kreutzer & Jäger (2011) found, volunteers benefit from being needed, without being over burdened. Providing formal orientation and training related to their role and to the organization focuses the efforts of volunteers and further engenders loyalty. Having autonomy and empowerment to undertake and complete clear tasks is a motivator for volunteers. Doing so on a flexible schedule supports volunteers’ participation in the association.

At the organizational level, Herman and Renz (2000) identified ten practices across successful not profit Boards of Directors. Of these characteristics, seven can be applied to small, volunteer-run, professional associations, namely;

1. The use of a board manual
2. All board members have office or committee responsibilities
3. Written policy specifying roles and powers of Executive Committee (in our case, this is a collection of volunteer-members who’ve committed to longer term positions)
4. Board uses consensus decision-making process
5. Orientation for new members
6. Written policy about attendance at board and committee meetings
7. Written policy on dismissal for absenteeism (pp. 153, excerpts from Table 2)

The literature review provides some ideas on how to match volunteers to the needs of the Chapter. Summarized by theme, these are:

- Recruitment
 - Be prepared for ongoing volunteer recruitment – have one volunteer member responsible for recruitment, recognition and acknowledgements.
 - Selection criteria are beneficial to the recruitment process, including an opportunity for volunteers to indicate their preferences for working alone or in teams, relative availability, and skills they are hoping to offer. This is an opportunity for volunteers to describe their own motivation for coming forward.
 - Identify the range of opportunities to volunteer (start with the association’s mandate and its strategic priorities; describe the tasks; and establish the qualities needed for each task). Group tasks together (identify and describe discrete volunteer assignments), but be willing to reshuffle these to accommodate the idiosyncrasies of volunteers as they come forward.
 - When offering volunteer opportunities include not just the specific tasks that need to be accomplished, but also the character traits most likely useful (e.g. extroverted, detail oriented, etc.) and whether the task can be shared. Include estimations of how long tasks have taken prior volunteers.
- Orientation
 - Use a consensus decision-making process, and recognize that consensus decisions can take longer. Include that in planning, recruitment, and orientation of volunteers.
 - Once a volunteer has come forward, have a written description of their role, including the opportunity for the volunteer-member to take initiative, make decisions, or ask questions.
 - Provide volunteers with in-person (or live on the phone) orientation to the association and training on the role that they are going to fill. Ideally, this is from a predecessor or someone with memory of why decisions were made, and actions were or were not taken in the past.
 - Introduce volunteers to paid staff to clarify the role of paid staff in the association.
- Scope
 - Volunteers need to be confident that they will succeed. Working with another volunteer (e.g. job shadowing, mentoring, team activities) and regular contact with another volunteer are useful here.
 - Remember that some volunteers are looking for social interaction. Activities that can be accomplished by one person may be best shared between two who are not looking to volunteer alone.
 - Make space for episodic volunteering that is short-term or even one time, with very clear deliverables and time frames.
 - Have a shared and written understanding of responsibilities to attend meetings that is realistic and respectful of volunteers’ time.
- Volunteer support and recognition
 - Identify what resources and supports are available, or not, for members who choose to volunteer.

- Schedule regular contact between volunteers and regular opportunities for appreciation and recognition.
- Provide certificates for training, reference letters and other documentation of the volunteers' efforts.
- Reflection
 - Provide an opportunity (perhaps annually) for the volunteers to collectively and individually reflect on the work they are doing together and individually. Ensure that the organizational identity is shared.

Volunteer associations benefit for substantial amounts of unpaid labour and the skills and talents of its volunteers. Each intentional effort to improve how these members volunteer will make their association more effective.

Context⁸

About the Canadian Evaluation Society British Columbia and Yukon Chapter

As noted above, the CES is "a volunteer-driven, professional organization of members who are dedicated to the advancement of evaluation theory and practice" (Canadian Evaluation Society - British Columbia and Yukon Chapter). The CES has geographically centred Chapters which "serve and represent the interests of the members of the Society" in a given region (Canadian Evaluation Society, 2012, p. 3).

The CESBCY by-laws specify its purpose: "In addition to promoting the objectives of CES generally, is to increase public awareness of the practices and purposes of evaluation. Further purposes of the Chapter are to develop educational programs and guidelines for practice for individuals, organizations and agencies, in the public, government and private sectors, who may engage in such activities" (Canadian Evaluation Society British Columbia and Yukon Chapter, 2010).

In 2009, the Northern Chapter of CES (CES-NWT) ended its activities after previously serving members from the Yukon, Northwest Territories and Nunavut. Adjacent Chapters took on responsibilities to serve CES members located in the North. The British Columbia Chapter expanded to include CES members from the Yukon, members from Alberta and the Northwest Territories merged, as did those from Nunavut and their closest air-link, the National Capital Chapter in Ottawa (Canadian Evaluation Society, 2009).

Yukon and BC members made contact and worked to integrate the Chapter in practice nearly immediately, while the structural changes to the Chapter were implemented in stages. A decision was made in 2009 not to re-brand the Chapter as host for the 2010 CES National Conference. At the following Annual General Meeting in October 2010, the Chapter amended its bylaws and operations to reflect the changes made in practice. The 5-year SMP was not formally updated at that time to reflect the additional

⁸ The reader is reminded that additional information on the Chapter's 2015 context is presented later in this report.

context considerations of members in the Yukon, nor was there an assessment of those members' needs. It is in this report that those efforts are captured. Appendix A includes a timeline related of events.

What problems were facing the Chapter in 2007/2008

In 2007, the Chapter identified a number of issues facing the organization, namely:

- The CES and the Chapter had limited visibility in BC.
 - The Chapter did not have an apparent regional culture or evaluative community of practice.
 - Membership trends and a prior survey suggested some dissatisfaction or disinterest of CES members in the Chapter.
 - Surveyed members identified enhanced networking, professional opportunities, and training as unmet needs.
 - The interaction between the volunteer members of the CEC and the wider membership was limited.
 - The Chapter had one of the first and one of the oldest, websites in the CES with limited functionality.
 - A relatively small group of members were organizing most Chapter events and administrative responsibilities, risking burn-out of those volunteers.
 - Events had inconsistent and at times low attendance.
 - The Chapter was scheduled to host the CES National Conference in Victoria in May 2010, a daunting task with few volunteers and limited member engagement.
- (CESBCY, 2007a; CESBCY, 2007b; de Cordova & Vojakovic, 2007).

Set in that context and based on substantive research and consultation, the Chapter developed its 2008-2013 Strategic and Marketing Plan (Canadian Evaluation Society - British Columbia Chapter, 2008, pp. A1-3). This included a Mission and Vision for the Chapter, along with five goals, broken out into 19 objectives, (see Figure 1).

Figure 1 Chapter Mission, Vision, Goals and Objectives (Strategic and Marketing Plan 2008-2012)

Vision
CESBC's vision is that BC will be a province where evaluation is visible, relevant and supports decision-making.
Mission
CESBC will work to increase the profile and use of evaluation by engaging and supporting the evaluation community in BC.
Goals

1. Evaluation makes a positive contribution to decision-making in BC.

- Objective 1. The relevance of evaluation to good decision-making is understood and recognized in sectors that could benefit.
- Objective 2. The BC government adopts an appropriate evaluation policy.
- Objective 3. Nonprofits in BC can implement evaluation effectively, relevant to their needs.

2. BC evaluation stakeholders belong to a Community of Practice.

- Objective 4. CESBC members, who wish to do so, can find and contact each other.
- Objective 5. Evaluation stakeholders can share information with each other, facilitated by CESBC.
- Objective 6. Evaluation stakeholders can learn from each other, facilitated by CESBC.
- Objective 7. Evaluation stakeholders are aware of career opportunities and service providers through CESBC.

3. CESBC is seen as the leader of the BC evaluation community of practice, representing all sectors and stakeholders across the province.

- Objective 8. CESBC has a high profile in the BC evaluation community of practice.
- Objective 9. CESBC's management is representative of the leaders in the evaluation community.
- Objective 10. CESBC membership is growing and satisfied.

4. BC evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.

- Objective 11. Monitor professional development needs.
- Objective 12. Offer standard CES training package (ESS, Logic Models, and Survey Research).
- Objective 13. Develop/support new professional development offering based on identified needs (through partnerships or independently).
- Objective 14. Ensure that CES professional designations are relevant and accessible to the BC evaluation community.
- Objective 15. Develop mentoring for junior evaluation stakeholders.

5. CESBC has the organizational capacity to achieve the other goals

- Objective 16. CESBC has a clear strategy with well-defined goals and interventions.
- Objective 17. CESBC has governance structures that fit the strategy.
- Objective 18. CESBC has human resources to carry out planned activities.
- Objective 19. CESBC has the right tools to implement the activities.

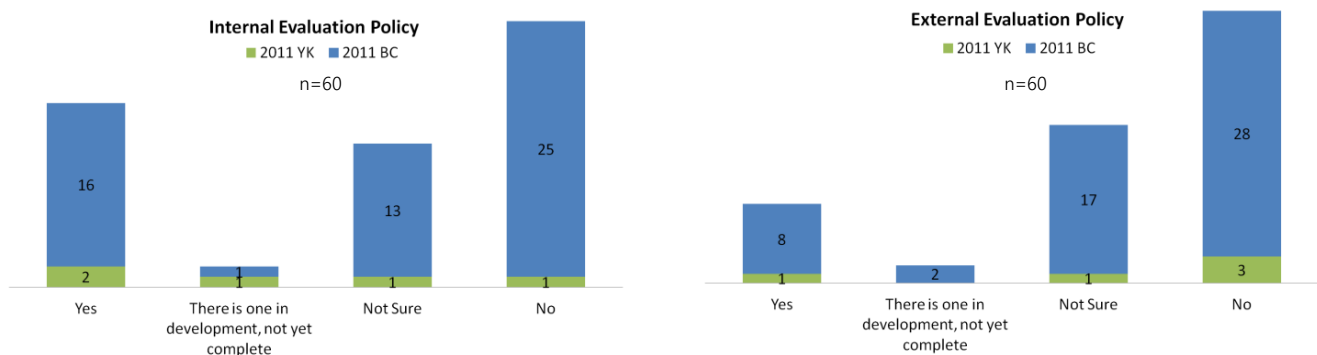
Operating environment

The SMP notes that in 2007 the role of evaluation in decision-making was “not a given” (Canadian Evaluation Society - British Columbia Chapter, 2008, p. 12), particularly in relation to the BC provincial government. Research for this project indicates that there has been little change on this front, and at least one estimate was that, “the pool of practicing, independent evaluators in British Columbia will likely shrink

in the coming years.” (Gautier, et al., 2010). Consultations with the volunteer executive members indicate that full time evaluation work is rare in BC and more so in the Yukon. Few organizations had full time internal evaluators and many evaluators worked part-time or on an ad hoc basis. This was also true for the 2011 survey respondents. Of the 60 respondents, 27 described their professional involvement in program evaluation as minor or none at all. Searching online for evaluators in the provincial and territorial governments showed similarly low results. A search of the British Columbia online directory of its staff and positions for the term ‘evaluation’ results in 36 people across 12 ministries in all of government, (Government of British Columbia, 2013). No similar database was found for the Yukon. A 2013 online search for Yukon government evaluators found very few hits from the prior dozen years.

The volunteer members of the CEC attributed this lack of use of evaluations and the low numbers of evaluation professional to a dearth of formal evaluation policies within the province or territory; be that government or other organizations. This goes back to the beginning of the century when the province moved from prior practice of using evaluation to one focused nearly exclusively to performance measurement data on short term targets, (McDavid, 2001). The low number of evaluation policies or requirements was reflected in the 2011 survey of Chapter contacts. Most respondents did not have, or were not aware of, internal or external evaluation policies, (see Figure 2).

Figure 2 2011 Survey: Prevalence of Internal or External evaluation policies



This is in contrast to the federal government. As reported in the *2011 Annual Report on the Health of the Evaluation Function*, (Treasury Board Secretariat of Canada) the federal government employed 497 full-time (or equivalent) people in evaluation teams in large departments and agencies (LDAs).

As reported in 2011, federal evaluation teams averaged slightly more than thirteen evaluation specialists, support staff and executives each (p. 2). In addition to these internal evaluators, the federal government contracts out substantial amounts of evaluation-related work to external evaluators. “In 2010–11, 73 per cent (99 of 136) of evaluations conducted by LDAs involved the use of contractors for at least some part of the work, whereas the remaining 27 per cent did not use contractors” (pp. 15-16).

When the Chapter's SMP was drafted in 2007/2008, federal policy required that all ongoing Grants and Contributions (Gs&Cs)⁹ programs be subject to evaluation at least every five years (Treasury Board Secretariat of Canada, 2012). In the intervening period the context of federal evaluation policy changed. A new federal *Policy on Evaluation* came into force in 2009 (Treasury Board Secretariat of Canada, 2009). Based on the *Financial Administration Act* (Justice Laws Website, R.S., c. F-10, s.42.1), this federal policy went on to increase the evaluation coverage to add ongoing direct program spending, also at least every five years. This represents a significant amount of government spending that is subject to evaluation each year, i.e. in 2010–2011, \$5.53 billion¹⁰ of government spending was evaluated (Treasury Board Secretariat of Canada, 2011, p. 3). At the same time, it must be recognized that “no new resources have been budgeted to meet these requirements, the expectation is that deputy heads will allocate the resources within their budgets” (Gautier, et al., 2010).

Although not as significant as work undertaken in Ottawa and its environs, federal programs in the Yukon or in BC, joint federal and territorial/provincial initiatives, and nonprofit organizations funded by the federal government are all bound to federal evaluation policy and subject to evaluations. While federal programs in British Columbia and the Yukon are evaluated to the federal standard, none of the data sources for this project indicated how many of these are led and/or managed by locally-based internal or external evaluators as compared to evaluators based in Ottawa or elsewhere.

Neither British Columbia nor the Yukon has an evaluation policy in place. The volunteer members of the CEC noted that provincial and territorial employees (with few exceptions) viewed federal evaluation requirements on joint initiatives as an external imposition – ‘a stick’ used by the federal government to exert influence on their provincial counterparts – and not as a positive opportunity for program improvement or internal learning. They similarly noted that the capacity in the provincial and territorial governments and in many of the communities they serve to plan for an evaluation, to hire an external evaluator, to undertake an evaluation internally, or to identify the characteristics of a good evaluation versus a poor evaluation were limited.

Volunteer members of the CEC distinguished between the province and territory in their expectations for changes in policy or evaluation practices.

Within the province, volunteer members of the CEC respondents commented on the negative influence the BC government had on evaluation over the past ten years. The government's influence away from evaluation goes back to the mid 1990s (McDavid, 2001). Evaluation, the respondents noted, existed in pockets of the provincial government. There were some internal allies, but generally evaluation was perceived negatively.

⁹ Gs&Cs are payments transferred to other organization (e.g. other levels of governments, nonprofit organizations, multilateral organizations, academe, etc.) where the funded program supports the goals and outcomes of the Government of Canada.

¹⁰ This includes \$1.83 billion of Grants and Contributions funding and a further \$3.70 billion of non-Gs&Cs direct program spending.

Some individuals identified in 2007 as part of the preparation for the SMP have since left the provincial government, but were available for interviews in the 2011/2012 data collection period. These respondents detailed that the distrust of evaluation related to a perception that evaluations were used as tools to justify unwelcome program changes. They also noted that there were instances of significant expenditures for evaluations that were poorly conducted and provided little value to the program in question.

Volunteer executive members referenced contacts within the provincial government who needed a proactive guide to finding and managing qualified external evaluators. Importantly, some noted that the BC government historically hasn't used the word 'evaluation', but instead identifies with 'evidenced-based decision-making' and more frequently 'benefits evaluation'.

Evaluation in the Yukon is somewhat different. It is a significantly smaller community, with closer ties to federal policy. The nonprofit sector has published a number of online reports. Volunteer Yukon has a list of professionals willing to volunteer their time. This list includes eight professionals willing and able to provide evaluation services (Volunteer Yukon, 2013). Interestingly, not all evaluators listed on this site are on the Chapter members or mailing list contacts.

Volunteer members of the CEC highlighted positive changes in the recent environment in the Yukon. In April of 2012, the Yukon's Deputy Ministers Human Resource Committee (DMHR) initiated a process to study and report on "creating a culture and consistent practice of adaptive planning and evaluation in the Government of Yukon" (Yukon Government, 2012). As noted online, the limited goal of the program is "not to produce certified or competent evaluators, but to provide participants with the confidence and skills they need to be successful in planning, managing and overseeing ongoing evaluation in their respective program areas." A pilot project within the program was scheduled to run from May/June 2013 until January/February 2014 (Yukon Government, 2012).

The context for these positive efforts is important for understanding evaluation in the Yukon. The prior Yukon government, volunteer members noted, implemented an *Accountability Act* with strategic planning and performance indicators. This *Act* was implemented with significant upheaval and a poorly received re-organization: it was immediately repealed as the first action of the current government (elected in 2011). From the start of the government's term in office, the word 'accountability' had negative connotations in the Territory more closely aligned with hindering public service than helping it.

Outside of the major governments, the municipalities, nonprofit, foundation, and other arenas are served by a small number of dedicated and qualified evaluators. It is in the health sector that evaluation use is strongest. British Columbia Health Authorities were identified by interviewees as having a small, but growing, evaluation community of practice.

CES National Council

Shortly after the SMP was implemented the Society's National Council developed a 2012-2015 Canadian Evaluation Society Strategic Plan (2013). New values were developed for CES, along with strategic issues for the Society nationally; see Figure 3 (Canadian Evaluation Society, 2013).

Figure 3 Canadian Evaluation Society Values and Strategic Issues (2012 – 2015)

<p>VALUES</p> <p><i>Inclusiveness</i> – Members value the diversity inherent in the communities in which they work and strive to ensure their methods are appropriate to the culture and context of these communities. As an organization, CES reaches out to ensure the diversity of the Canadian population is reflected in its membership.</p> <p><i>Social Commitment</i> – Members participate on a voluntary basis and choose to give freely of their time and knowledge as a positive and essential expression of social commitment to evaluation and societal benefits from evaluation.</p> <p><i>Accountability</i> – Members accept responsibility for her/his actions as they relate to evaluation practice and activities conducted on behalf of CES.</p> <p><i>Transparency</i> – Members openly disclose values, purposes, expectations, actions and conclusions while providing complete and honest information.</p> <p><i>Wisdom</i> – Members respect the ability to make good judgments based on what is learned from experience.</p>
<p>STRATEGIC ISSUES</p> <p>Issue 1: <i>Organizational Infrastructure</i> Goal: By June 2015, CES will have completed infrastructure improvements to support the future sustainability of the Society and its contribution to the field of evaluation in Canada and internationally.</p> <p>Issue 2: <i>Professional Learning</i> Goal: By June 2015, CES will have processes in place to report on member, Chapter, national, and international involvement in professional development and the PDP program and the extent to which the field of evaluation has changed.</p> <p>Issue 3: <i>Advocacy</i> Goal: By June 2015, CES will have promoted evaluation for the betterment of program sponsors, program beneficiaries, and society.</p>

Issue 4: *Strategic Partnerships*

Goal: By June 2015, CES will have developed strategic partnerships and networks, such that purposeful working relationships are established and leadership momentum is maintained.

The National Council replaced its Secretariat service in December 2012, ending a 24 year relationship in favour of a new service provider (Canadian Evaluation Society, 2013). The full impact of this transition on the Chapter or CES National was not yet clear by 2011/2012.¹¹

Program changes

During the period of the SMP, the programs offered by the Society nationally and at with CESBCY changed. In some cases these changes were to programs and services delivered by the CES nationally, some by changes were initiated by the Chapter, and others began with separate organizations who later partnered with the CES. Improved benefits to members included:

- Initiated prior to the CESBC's development of its SMP, the National Council of CES was working towards the development of a credentialing program for evaluators in the early stages of the SMP (Canadian Evaluation Society, 2010). The CES' Professional Designations Program, which oversees the Credentialed Evaluator designation, was approved in 2009 (Canadian Evaluation Society - British Columbia and Yukon Chapter). The associated Competencies for Canadian Evaluation Practice were released concurrently (2009).
- In January 2012, CES adopted the Program Evaluation Standards developed by the Joint Committee on Standards for Educational Evaluation (JCSEE), "These standards guide and inform the practice of evaluation and deal with the utility, feasibility, propriety, accuracy and accountability of evaluation and evaluators"(Canadian Evaluation Society, 2013).
- The Consortium of Universities for Evaluation Education (CUEE) formed in 2008 to "increase opportunities for current and prospective evaluation professionals to acquire the knowledge and skills required to become evaluation practitioners" through cross-accreditation and coordination of university-level evaluation training (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009). In 2009, the CES provided financial support to the CUEE.
- The CES Education Fund (CESEF) is a charity that had previously separated from the CES. By 2009, CES finalized a structural relationship with the CESEF that supports the jointly offering student oriented programs (Canadian Evaluation Society - British Columbia and Yukon Chapter). This relationship grew to allow CES members to concurrently donate funds to the CESEF when renewing or beginning their

¹¹ Additional context is provided further in under Chapter and National, page 37.

CES membership (Canadian Evaluation Society, 2013).

- The Chapter updated its website in 2009 (discussed further below under Success and barriers, Online presence, page 19).
- Soon after the updated website launched, the Chapter included free online training or webinars on its calendar and in notices to contacts (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009).
- In September 2011, CES National announced a webinar series that began in October of that year (Canadian Evaluation Society, 2011). Initially at reduced rates for CES members, the webinar series was made free to CES members in the October 2012 (Canadian Evaluation Society, 2012).
- The Chapter provided significant financial and administrative support to a grassroots initiative to develop a mentoring program for evaluators in Canada (Evaluation Mentoring Canada, 2011). Evaluation Mentoring Canada (EMC) included volunteers from the Ottawa area and British Columbia. EMC subsequently received additional financial support from other chapters and CES National (2011) and further developed its proposed program.

In addition to these benefits there were two benefits (temporarily¹²) lost to members, and an increase in membership fees. In 2009, the *Canadian Journal of Program Evaluation (CJPE)* ceased to be a member-only benefit and was free online (Canadian Evaluation Society, 2013). Previously, members had access to group insurance for errors and omissions, and for liability. This nationally offered benefit was lost in 2011. Importantly for members, the cost of membership in the CES increased substantially in 2009 (i.e. from \$125 for an individual to \$165, an increase of roughly 30%), (Canadian Evaluation Society, 2008).

Benefits of membership

In 2007, the Chapter asked respondents to rate the importance of eight benefits of CES membership on a three point scale: minimal – somewhat – considerable. This included benefits that existed at that time and what they hoped for in the future. These same questions were asked of respondents to the 2011 Chapter survey. Overall, the survey respondents from the 2011 survey were less enthusiastic about the received benefits than those who responded in 2007.

In 2007, survey respondents described three items as 'considerable' benefits of holding a CES membership for the then current time frame and future:

- *Access to professional development and training opportunities*
- *Understanding of current practices and the state of research for evaluation in Canada*

¹² These benefits were later amended or reinstated, as described in the below section, Context – 2015.

- *Affiliation with a professional association*

In each instance, 2011 respondents' ratings decreased to 'somewhat or 'minimally' beneficial for these items.

Going forward, 2011 survey respondents were most likely to find '*professional credibility*', and '*awareness of contracting and employment opportunities*' to be 'somewhat' of a benefit of membership. This was similar to the 2007 respondents' ratings.

Respondent's assessment of '*networking with colleagues who share professional interests*' showed a greater degree of disparity. Whereas 2007 respondents were most likely to find this a considerable benefit of membership in the future, 2011 respondents found this to be a minimal benefit.

For both the 2007 and 2011 surveys '*opportunities to collaborate on projects*' and '*mentoring opportunities*' were relatively unimportant benefits of CES membership.¹³

Chapter membership

Prior to the development and implementation of the SMP, the Chapter had a relatively consistent number of CES members (e.g. 145 members in 2007, 142 in 2008 (CES, 2007-2008 Annual Report)).

In 2007, these members were primarily concentrated in the Lower Mainland (52.5%) and Vancouver Island (37.6%), (Canadian Evaluation Society - British Columbia Chapter, 2008, p. 8), see Figure 4. By 2013, there were 170 CES members in BC and the Yukon, a 17% increase.

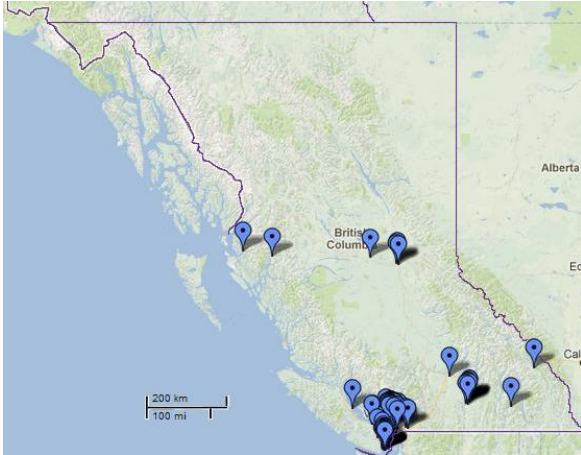
In addition to the increase in CES members, the Chapter began to track its non-member contacts (those who had registered with the website, attended an event, or otherwise purposely shared their contact details with the Chapter). By March of 2013, the Chapter had 595 contacts across BC, the Yukon, and one CES member in Alaska, (see Figure 5).¹⁴

Figure 4 2007 Map: Chapter membership (n=142)

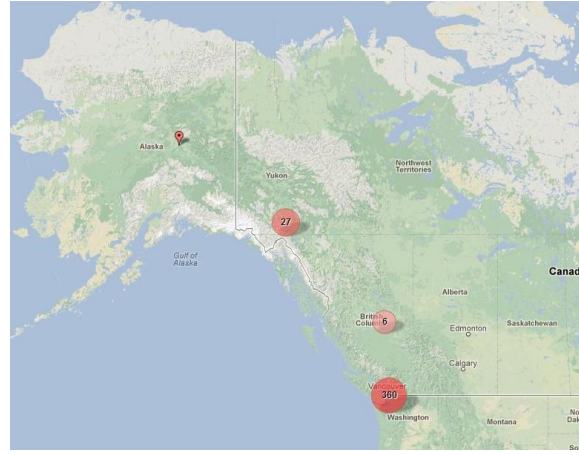
Figure 5 2013 Map: Chapter contacts (n=394)

¹³ See Appendix B for rating provided by 2007 and 2011 respondents for each proposed benefit by year and for current or future years. Additional details on changes to the membership are included below under Success and barriers.

¹⁴ Additional information on the growth in the Chapter's contacts is included in 'Members and a Community of Practice', starting on page 30.



In this map, individual members are identified by blue pins. Details from 2007 on the location and number CES members in the Yukon were not found during this review.



In this map, the south west portion of BC has 360 members. There are six mid-province, 27 in the Yukon, and one in Alaska. This total is less than the 598 contacts as not all contacts choose to include a complete address of work in their registration.

The 2007 and 2011 surveys provide additional information on the context and environmental changes that occurred in the intervening years.¹⁵ A plurality of the CES members (42%) responding to the 2011 survey had been members for one to three years, an increase over the 2007 survey (30%).¹⁶ This may indicate a slightly better retention rate of new members since the implementation of the SMP.

The 2007 SMP reported that many working in or using evaluation in the Chapter were doing so as a part-time effort or consulting to multiple clients. This continued to be the case four years later. The 2011 survey of Chapter contacts indicates that a large proportion of evaluators in BC and the Yukon work in private consulting firms 43%. A review of the Chapter website finds eleven evaluation service providers listed, many indicating additional areas of expertise (Canadian Evaluation Society - British Columbia and Yukon Chapter).

The Chapter's goals

The Chapter's volunteers undertook significant efforts during the first years implementing the SMP. Before presenting findings related to these efforts, it is useful to review the five goals set out in the SMP and members' feedback on those goals.

Including both the Yukon and British Columbia, the goals of the Chapter are:

1. BC and Yukon evaluation stakeholders belong to a Community of Practice.
2. BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.

¹⁵ Appendix B includes detailed data and related figures.

¹⁶ While not statistically significant, the number of responses in each survey is comparable: 44 of 145 members in 2007 and 48 of 170 members in 2011. The 2011 survey was open to all members of the Chapter mailing list. In total 60 of 593 contacts responded.

3. CESBCY has the organizational capacity to achieve the other goals.
4. CESBCY is seen as the leader of the BC and Yukon evaluation community of practice, representing all sectors and stakeholders across the province.
5. Evaluation makes a positive contribution to decision-making in BC and the Yukon.

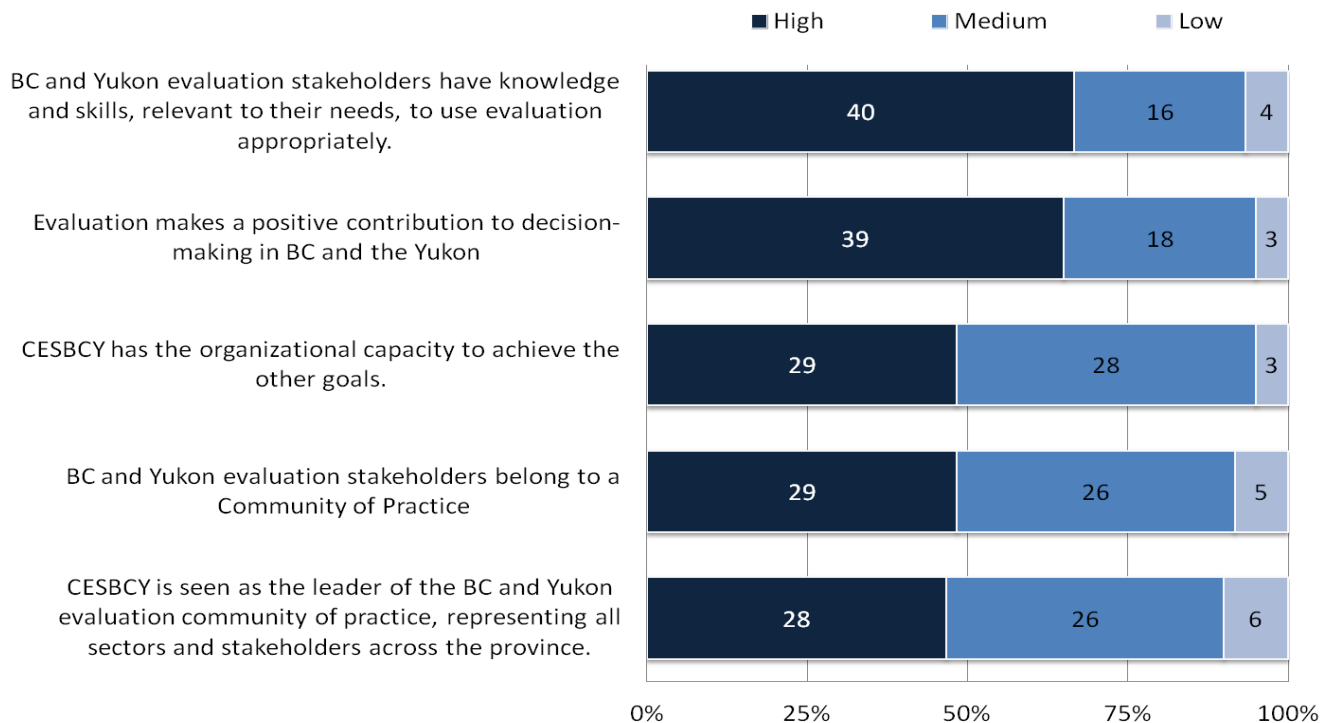
These goals were included in consultations with the volunteer members of the Executive. Specifically respondents were asked whether the goals continue to resonate with them and whether they suggested any changes. The volunteer executive members had with varied enthusiasm for the goals. While none of the volunteers wanted changes made to the goals, they differed on whether the goals were 'great' and relevant for the Chapter, or were 'passive artefacts' of prior planning and not a conscious part of current thinking.

The 2011 survey of Chapter contacts completed as part of this review asked respondents for similar feedback on the five goals identified in the SMP.¹⁷ The results indicated that the goals remain relevant for surveyed contacts. Respondents to the 2011 survey were supportive of the existing goals generally, but lacked significant enthusiasm for any one of the five goals.

Specifically, 2011 survey respondents most frequently rated *BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately* as high importance (n=40 of 60). A further sixteen respondents found this goal to be of medium importance. *Evaluation makes a positive contribution to decision-making in BC and the Yukon* had nearly the same number of high importance ratings (n=39) and a fewer number of low importance ratings (n=3). Sorting the Chapter's goals by 'high' importance rankings, then medium and lowest, the five goals can be prioritized across survey respondents as shown in Figure 6.

¹⁷ For clarity and to represent the expanded membership, the goals presented in the survey included the Yukon and members there.

Figure 6 2011 Survey: Importance of five goals for all respondents



When asked for other issues or priorities the Chapter should focus on, ten survey respondents offered the following overlapping suggestions.¹⁸

- The Chapter should operate in a more cohesive manner, to “knit together the rural, remote and distant cities across two large geographic areas” (n=4). Respondents noted that the separation of the Chapter into smaller, local areas served to isolate members from each other and produce significant disparity in the availability of services and networking opportunities. Respondents suggested dispensing with separate local coordination groups and having volunteers to plan events collectively.
- At the same time, respondents asked for teleconference or webinar tools and other online ways of communicating for planning and as a means of sharing professional development opportunities (n=4).
- Respondents asked for the volunteering Executive to communicate more openly and more frequently with non-volunteering members (n=3) so as to increase the Chapter’s transparency and demonstrate the value of membership in the CES.
- Mentoring was specifically identified as a program desired from the Chapter (n=2).
- Respondents suggested that events/services offered be based on a regular needs assessment tied to the credentialing process (n=2) and that credentialing be actively promoted by the Chapter (n=2).
- Including efforts to retain existing members, recruit new members, and recruiting new members to volunteer were also suggested (n=2).

¹⁸ The ten respondents who authored these suggestions were from Okanagan – Interior, Vancouver (Lower mainland), and Vancouver Island (South). This small number of responses cannot be considered representative of the whole of the Chapter. Nonetheless, the ideas themselves can be considered on their own merit by the Chapter as it plans for the future.

When interviewed, members of the Volunteer Chapter Executive suggested that CESBCY should review and report on its goals annually in a more formal fashion to better inform and engage the membership and to ensure that goals and practices of the Executive were aligned to with membership needs and wants.

Successes and barriers

The Chapter's early efforts centred on two aspects of the SMP: the preparation for the 2010 CES National Conference; and, improving its online presence to better serve and communicate with members and the wider evaluation community. The 2010 National Conference and the updated website were two areas of focus encompassed by the 19 objectives of the SMP (refer to Figure 1).

Consulted volunteer executive members were very positive about the work undertaken since the adoption of the SMP. In addition to the Conference and the website, they highlighted the large number of successful events, communication between members, and the integration of the CE program into the Chapter's efforts (i.e. specific in-person events to assist members in completing their applications, identifying which of the Core Competencies are addressed by specific learning events).

Other data sources supported this level of enthusiasm. Beginning with few volunteers, little engagement, and few financial resources in 2007, the Chapter marshalled significant volunteer efforts to achieve many of its goals, making progress on others. Volunteer Executive members identified few barriers, speaking mostly positively about the future. Evidence of barriers faced and overcome came instead from Chapter documents and other records.

2010 CES National Conference

The most significant effort undertaken by the Chapter under the SMP was to host the 2010 CES National Conference in Victoria (May 2-5, 2010). In 2007, there were few volunteers, limited member engagement, and few financial resources. The idea of conference preparation was daunting. The Conference facilities were arranged in May 2007 and planning began in earnest in Spring 2008, just as the SMP was coming into force (Canadian Evaluation Society, 2011). A subset of the volunteer CEC immediately began the search for additional volunteers. By the time the Conference opened, eighteen volunteer members worked together to manage the Conference Organizing Committee of nearly forty more volunteers (Conference Organizing Committee (COC) for the 2010 CES National Conference, 2013). These were in addition to those who volunteered their time as members of the CEC for related CES projects nationally (most notably, the Student Case Competition).

Figure 7 2010 CES National Conference logo



Despite fears of low turn-out and financial losses during an economic downturn, the Conference produced positive attendance and financial figures. The Conference attracted 422 registrants and

“maximized provincial members’ participation with 105 BC member registrations including 37 new [Chapter members], from a pre-conference membership of about 150 (although participation from non-members in the provincial government was disappointing)” (Canadian Evaluation Society, 2011, pp. 7-9). The Conference was a financial success, generating a positive balance despite expectations for a loss. This was due in large part to excellent marketing and networking generating commercial sponsorships of over forty-four thousand dollars and additional in-kind support from 28 sponsors and exhibitors. Overall, there were 34 contributing organizations, of which 14 were exhibitors. (Canadian Evaluation Society, 2010).

The significant efforts of the local area coordinators and the volunteers involved in the 2010 Conference organization were highly praised by the consulted volunteers. Volunteer members noted the drain put on the volunteer core (Executive members and event-specific volunteers) after the 2010 Conference. The need for ongoing recognition and thanks of volunteers was highlighted among survey respondents and the volunteer Executive (discussed further below).

Online presence

When the SMP was drafted, CES and the Chapter had limited visibility in BC. The Chapter’s website had limited functionality. While the effort to organize the 2010 Conference was ongoing, other volunteers established a social media presence. In 2008, the Chapter set up a Twitter account (@CESBCY, 2013) and a LinkedIn group account (CESBCY on LinkedIn, 2013). In 2009, Chapter volunteers coordinated with the volunteer webmaster for the Society’s national page and with the National Council to establish a Facebook page for the Society. The Chapter redesigned and launched its website to be user-oriented and informative.

The Chapter website had a number of ‘back-of-house’ features, including:

- A membership database,
- An events database that allows for online registrations with tiered pricing and/or limited access to events by members, non-members or other classifications (e.g. student),
- Broadcast news updates (called email blasts) to all contacts,
- File storage capacity for attachments to email blasts, details for events, publication of Chapter reports or updates, as well as images and graphics related to the website,
- Financial reporting based on event registrations and other income (the Chapter is not currently using this function), and
- A public face to the website that has automated language translation from Google Translate linked to the Chapter’s social media, namely: CESBCY LinkedIn group page (262 members), @CESBCY on Twitter (80 followers), and CES on Facebook, (Canadian Evaluation Society - British Columbia and Yukon Chapter).

Google Analytics was applied to the website September 9, 2010 to allow for tracking of the website’s use to visitors. Between September 2010 and March 2013, the Chapter website had over 12,000 visits, primarily

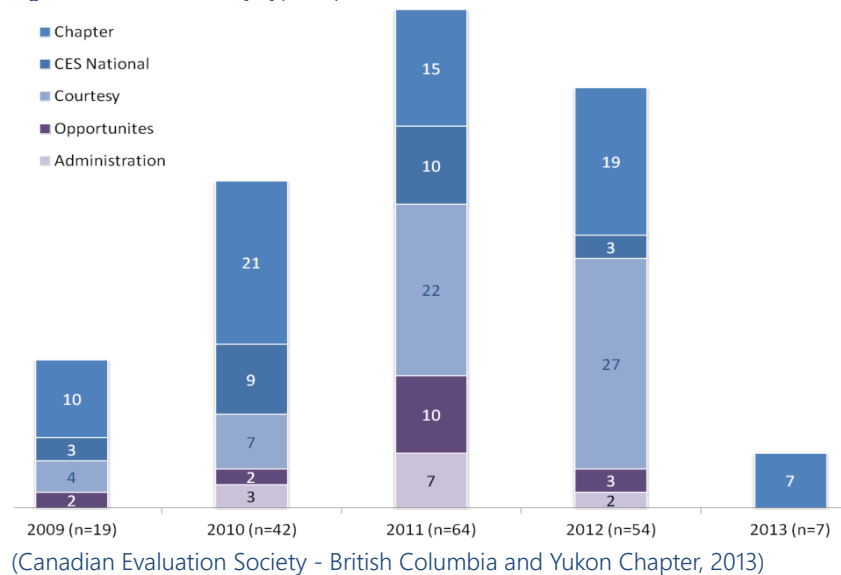
from Canada, and most frequently from the Vancouver and Victoria areas. (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2010).

Events

The SMP notes that in the years immediately prior to its development, Chapter events had inconsistent and, at times, low attendance. Chapter members surveyed in advance of the SMP identified a dearth of networking, employment, and professional development opportunities. Chapter volunteers used its online tools (website, social media, integrated email blasts) to actively promote external networking, administrative, and learning events. Between April 2009 and March 2013, the Chapter promoted 186 such events (Figure 8 includes a chart of event type by year); this included:

- Chapter events (n=72), such as the lunch time events, full-day/multi-day training opportunities, or networking events
- CES National events (n=25), including the CES National Conference and online or telephone-based training
- Courtesy postings (n=60), training or other events of interest to members and Chapter contacts offered by other organizations
- Opportunities¹⁹ (n=17), for contracts and employment available in to BC and Yukon-based evaluators
- Administrative posts (n=12), such as the CEC meetings, allowing members to know when the Chapter meets and what is discussed, and what is decided

Figure 8 All events by type. April 2009 to March 2013. (n=186)

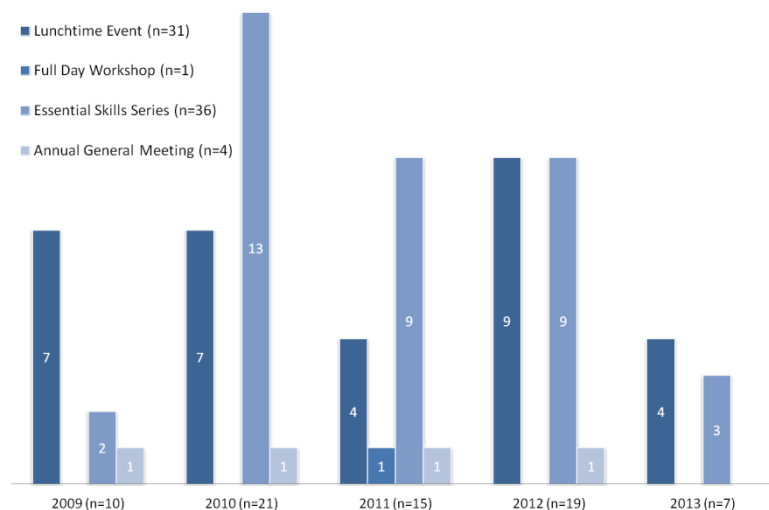


¹⁹ In 2012, the website was updated. An automated feed from the CES National opportunities list and others were moved from the events feature to a separate page (<http://bc.evaluationcanada.ca/opportunities>). The page serves the same function, but is no longer independently generated within the Chapter.

Profession development

To address the SMP objective *Evaluation stakeholders can learn from each other*, volunteer members worked to offer a range of learning events. Over the four year period, the Chapter offered a relatively similar number of events each year. Consistent with its objective to *continue to offer standard CES training*, the introductory Essential Skills Series is the most commonly offered Chapter event, making up half of the 72 events offered by the Chapter in the four years.²⁰ Figure 9 includes a breakdown of the events offered by the Chapter each year or part thereof.

Figure 9 Chapter events by year. April 2009 to March 2013. (n=72)



To further support professional development, a survey of the Chapter membership was undertaken in 2010 to determine the professional development needs of the Chapter members and contacts. Respondents provided ideas and feedback on desired training topics, potential trainers, costs, timing and training duration, willingness to travel, and preferred delivery method for professional development. The results were shared on the Chapter website, allowing members, contacts, volunteers, and external groups to understand the need and market opportunity. Professional development opportunities were then informed by these responses and subsequent offerings were reflective of the survey findings.

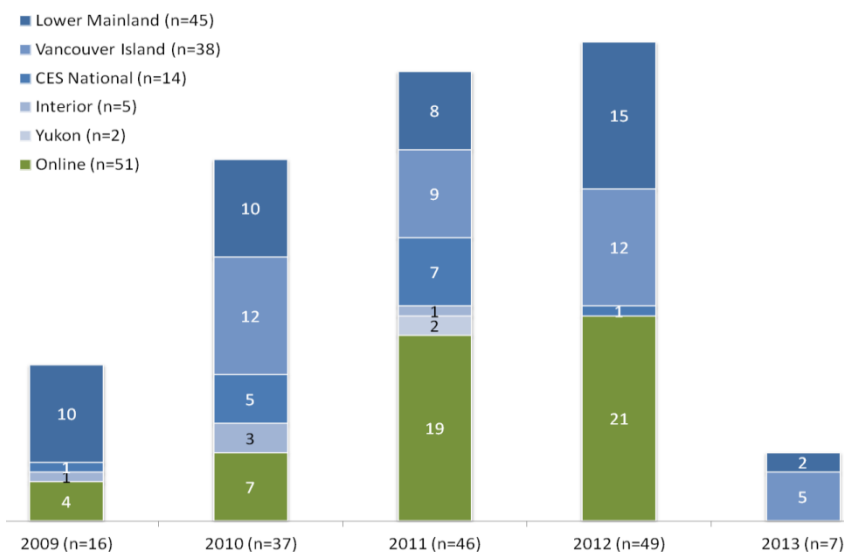
Although not explicitly enunciated in the SMP, volunteer members worked to ensure that professional development opportunities were available to members across the Chapter.

Between April 2009 and March 2013, in-person training was offered ninety times: in the Lower Mainland (n=45), on Vancouver Island (n=38) in the Interior (n=5), and the Yukon (n=2).

Roughly a third (n=51) of the events listed were online events, accessible to members throughout the Chapter. Figure 10 displays the 155 training and networking events featured on the website events page, by year and location.

²⁰ Participants were able to register for the ESS in one of three ways. As such, when reporting on the ESS was counted to reflect the way in which it was offered, i.e. if a given four-day ESS training session was offered as a four-day event and two 2-day events, than 3 events are counted.

Figure 10 All training and networking events. April 2009 and March 2013 (n=155)



Members and a Community of Practice

At the time the SMP was developed the Chapter recognized that there were many evaluation supporters who were not members of the CES. There was no apparent evaluative community of practice (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2007). Based on the prior research and consultations, the volunteer Executive decided to support the wider evaluation community, not only members of CES, and to support the development of an evaluation community of practice.

The website's member database allows for delineation between contacts. The Chapter uses this to track both CES members in BC and the Yukon, and mailing list recipients for CESBCY news and event notices. These non-member contacts include event participants, former members who have chosen to let their membership lapse for a period of time, people who register to receive email blasts, and CES members from other chapters who have an interest in BCY events.

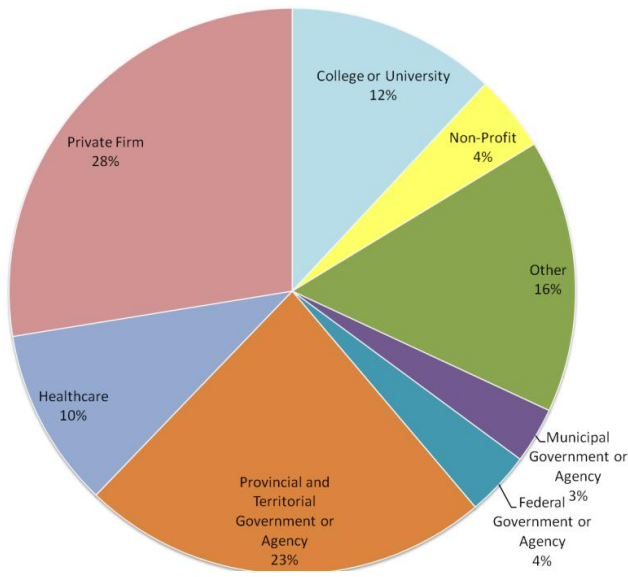
As noted earlier, the Chapter's CES membership had grown by 17% to 170 people (including 14 members who volunteer to form the CEC) between 2007 and 2013. CES members were the minority in the Chapter's contact list. By March of 2013, the Chapter had ongoing contact with nearly six hundred people of the wider evaluation community (see Figure 11 for a breakdown).

Figure 11 Growth in Chapter contacts 2007 to 2013

Contacts	2007	2013	% change
CES Members	145	170	17% increase
Mailing List		425 ²¹	all new
Total	145	595	309% increase

²¹ Interestingly, having a large number of individuals interested in or conducting evaluation who are not members of the CES is not unique to CESBCY. Gail Barrington asks, "Why are there so many practicing evaluators in [Alberta] who do not belong to CES?" (Gautier, et al., 2010). Other chapters, notably Newfoundland and Quebec's *La Société québécoise d'évaluation de programme* had similar lists of non-CES member contacts.

Figure 12 2011 Chapter contacts' industry sectors (n=595)



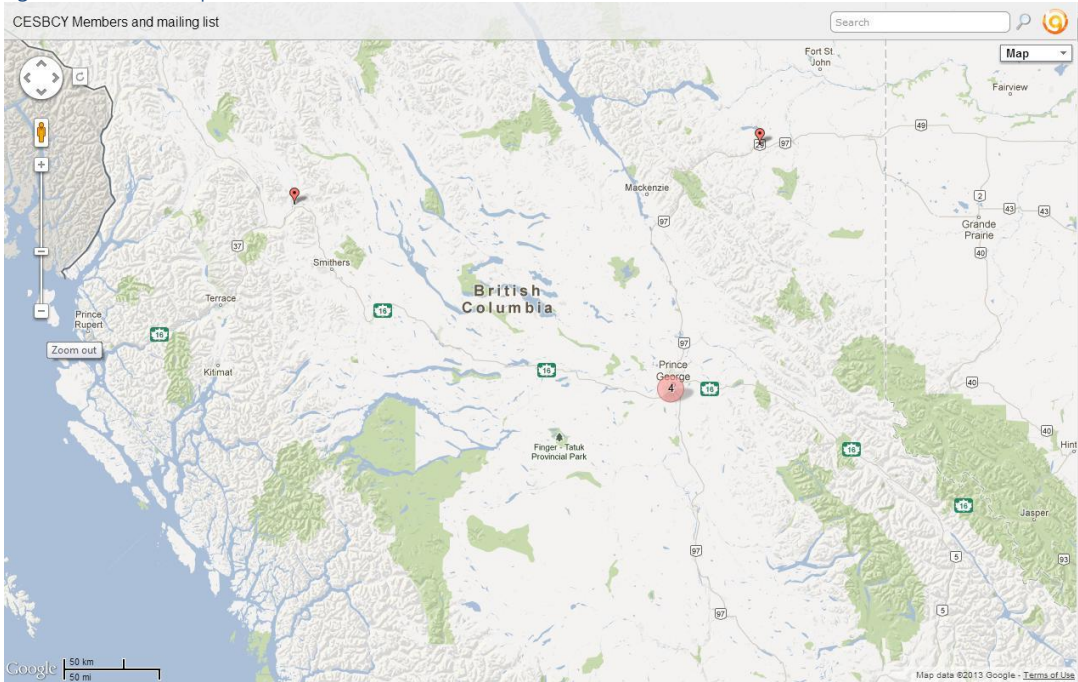
The community of evaluators in the CESBCY contact list (both members and non-members) represent a breadth of the profession. Of the nearly 600 contacts, nearly a third (n=180) worked in a government department or agency (primarily provincial/territorial, with some federal and municipal representation). Nearly as many (n=164) operated in the private sector. Contacts in health care and education were near a quarter of the community (n=132). Nonprofit and other organizations accounted for the remaining twenty percent of Chapter contacts (n=119). Figure 12 has a breakdown of the different industry sectors represented.

The Chapter's contacts were largely dispersed. The vast majority of contacts continued to be in the southwest of British Columbia, with smaller numbers scattered throughout the province.

Even in seemingly concentrated areas of Vancouver Island and the Lower Mainland, contacts can be hour-plus distances apart. Similarly, in the Yukon and the Interior, distances between contacts are not inconsequential.

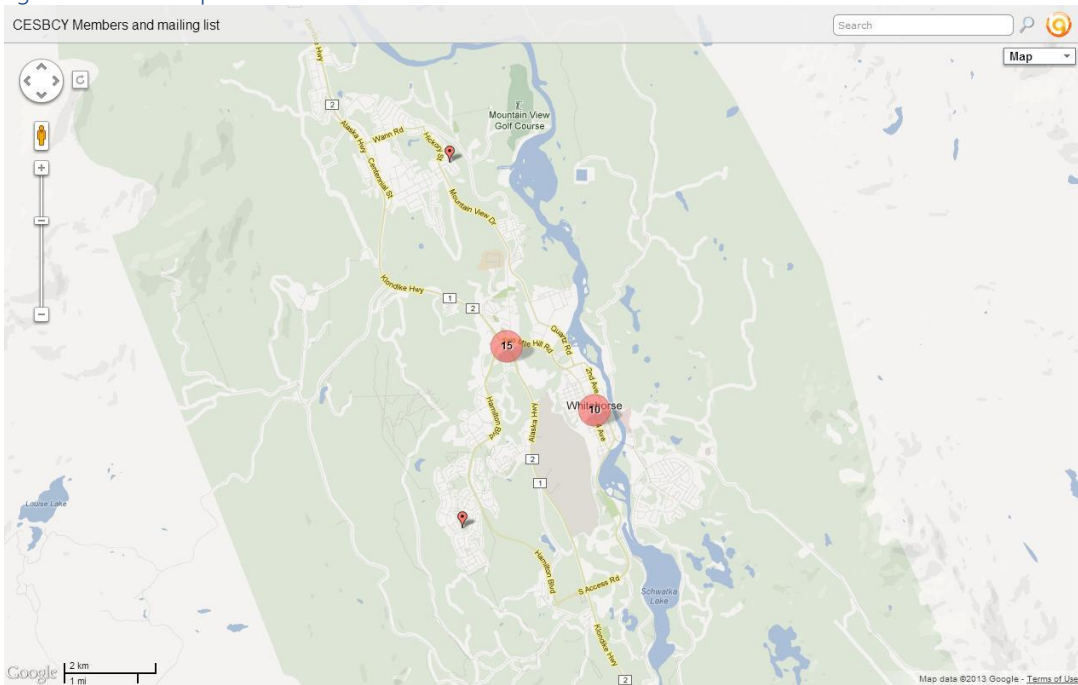
In Figures 13 – 16 red markers are used to denote the location of the Chapter's contacts, as of 2013. Single markers denote an individual. Larger red circles are proportional to the number of individuals living in close proximity; the number of individuals is included in the centre of the red circle. What is most evident in these maps is the dispersion of the membership and Chapter contacts. (Additional detailed maps are available in the [Membership](#) section of Appendix B).

Figure 13 2013 Map: All contacts in Northern BC



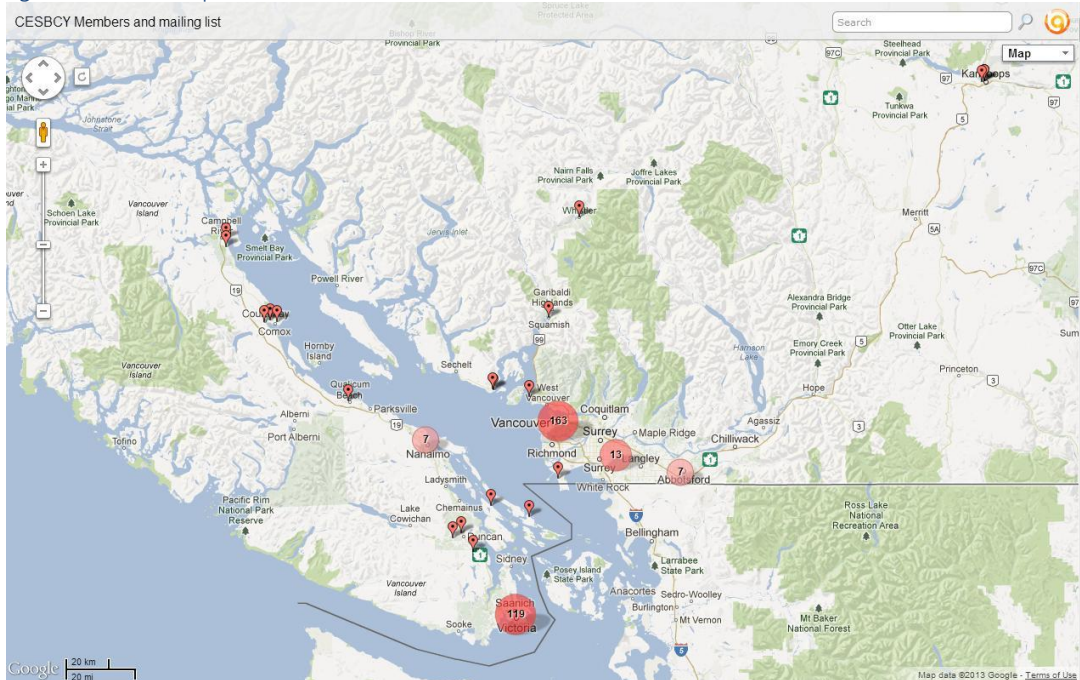
This map of Northern British Columbia shows four contacts in Prince George and two other individuals several hours away.

Figure 14 2013 Map: All contacts in Yukon



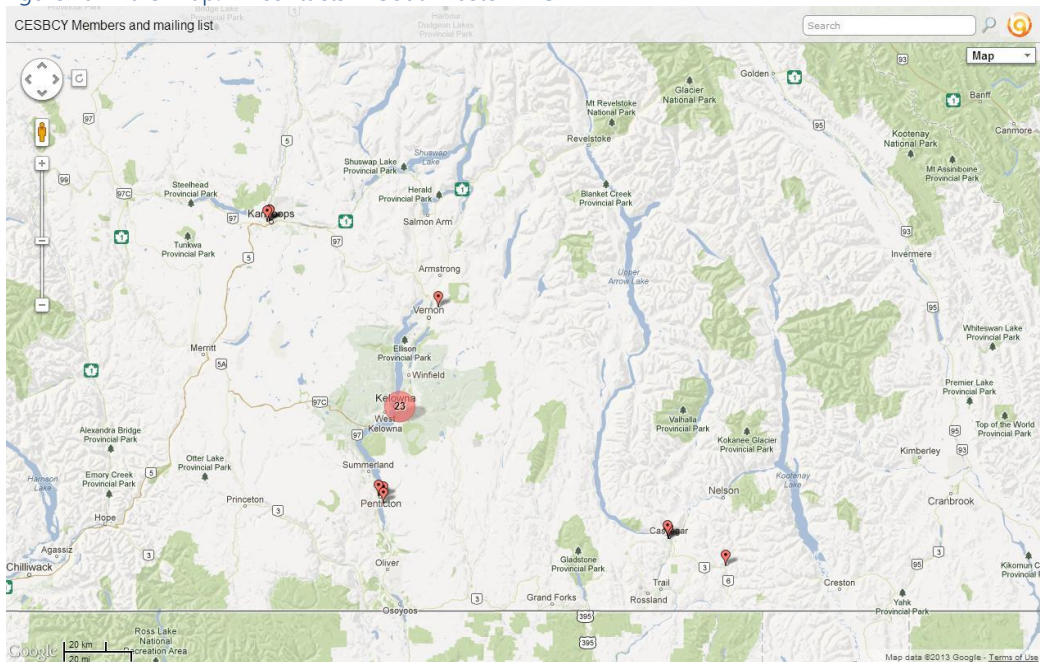
This map of Yukon-based contacts shows them more closely located, with 10 in Whitehorse and another 15 nearby.

Figure 15 2013 Map: All contacts in South western BC



This map of South western British Columbia shows contacts distributed around the South Island (119 in Victoria, 7 in Nanaimo) and the Lower Mainland (163 in Vancouver, 13 in Surrey/Langley, 7 in Abbotsford), with several individuals in a dozen smaller communities.

Figure 16 2013 Map: All contacts in South Eastern BC



This map of North western British Columbia shows contacts collected across Kelowna (23), with small numbers of others in Penticton, Kamloops, and smaller communities; each hours away from each other.

Consulted volunteer executive members noted that providing significant professional development and other benefits to non-volunteering members outside the Lower Mainland and Vancouver Island was a

challenge. Working in evaluation in an intermittent or part-time basis limits the professional affiliation of many. This was identified as a challenge to the growth of evaluation in general and a challenge to the CESBCY on how to support these evaluators.

As of 2012/2013, the desired community of practice was still in development. The greater visibility and communication were evident, but the survey indicated large sectors of the evaluation community are unaware of each others' efforts. Past surveys and consultations with volunteers indicate that many who work in evaluation in BC and the Yukon do so part-time or on an ad hoc basis. The non-member contacts have limited professional affiliation. It is more difficult to engage these professionals in Chapter events and news. Volunteers posited ways to better serve the wider community of practice, ideally with the result that these individuals would join the Society. Suggestions included:

- promoting and supporting the CE as a means of finding 'good' evaluators,
- increasing benefits of membership so that non-members wish to join through increased professional development opportunities or group insurance benefits, i.e. errors and omission / liability insurance, medical /dental insurance, and
- providing guidance and advocacy to users of evaluation on how to draft accurate requests for proposal (RFPs), potentially referencing the core competencies.

Advocacy

A review of advocacy within the Chapter preceded the development of the SMP and informed the terms of reference for the five-year plan (Discussion Paper on Advocacy for the BC Chapter, 2007). In the completed SMP, advocacy was one of twelve roles proposed for the volunteer members of the CEC. As per the SMP, "advocacy is responsible for promoting understanding and use of evaluation in BC; initiating, maintaining and coordinating contacts with key stakeholders; educating stakeholders about the benefits of evaluation, and persuading decision-makers to put in place policies favouring evaluation" (2008, pp. 36-37).

The first goal of the SMP, "*Evaluation makes a positive contribution to decision-making in BC,*" centres on advocacy related efforts. A number of champions from different industry sectors were identified in the original SMP. While this review found some initial efforts had been undertaken on the related actions, the Chapter had not seen successes in its advocacy related goals and objective. While the Advocacy position was briefly merged with Presidency-related responsibilities within the Chapter, it had for the most part been unfilled. Discussions were held with champions prior to the 2010 Conference, but no substantive relationship was established. The volunteers in the CEC acknowledged that there has been very limited progress in advocating for an evaluation policy.

Some volunteer members wondered if it were reasonable for the Chapter to target such a significant policy change with the existing number of volunteers and the available volunteer capacity. These goals

may have been particularly ambitious given the significant volunteer effort that was dedicated separately to the preparation for the 2010 Conference.

Any future advocacy efforts, volunteers noted, need to be managed carefully. Compared to prior years, the 2013 budgets of both BC and the Yukon were expected to shrink. Some consulted volunteer executive members hoped that might produce an opportunity for evaluation to demonstrate which programs to protect and which to let go, these interviewees hoped the benefit of evaluation itself becomes apparent. Others identified that decision-makers with little experience with evaluation necessarily had limited capacity to commission evaluations or to judge the relative worth of an evaluation. CES was in a unique position, they suggested, to describe the standards of good evaluation and good evaluators, in part with the CE and its associated core competencies.

There were existing provincial government contacts and pockets of evaluation are continuing. If the Chapter choose to advocate to governments, a recommendation was made for an advocacy team made up of academics, practicing internal and external evaluators, and evaluation users. This team could then approach decision-makers. It was suggested that these discussions focus on evaluation as an internal learning and program improvement tool, linked to the policy cycle.

Specific suggestions included using examples of quality evaluations that benefited policy and program managers, a briefing on the CE designation as a filter for identifying qualified suppliers, as well as quality control tools and checklists that are available for those new to evaluation.

Any future advocacy efforts would necessarily be focused differently in the province and the Yukon, and would need to be mutually aware. Using the existing nomenclature i.e. 'evidenced-based decision-making' would be essential in any discussions or advocacy to the BC government, while at the same time, respecting the experience in the Yukon and avoiding the use of the term 'accountability'. Focussing on the learning and program improvement aspects of evaluation uses were similarly suggested.

Advocacy would similarly need to be coordinated with others within the Society. The 2012-2015 Canadian Evaluation Society Strategic Plan for the society as a whole included advocacy as one of its main issues, including a goal that *by June 2015, CES will have promoted evaluation for the betterment of program sponsors, program beneficiaries, and society* (2013).

Volunteer capacity and recognition

In 2007, a handful of volunteers were feeling the pressure of preparing local events (de Cordova & Vojakovic, 2007). There was limited member participation in the Chapter. Early concerns of the 2007 volunteer executive members were that the Chapter would have insufficient volunteer capacity to host the 2010 Conference or achieve its other goals. (Strategic and Marketing Plan 2008-2012, 2008, p. A19). In response, the SMP calls for the Chapter to make organizational and procedural changes to improve its volunteer capacity, to:

strive to make volunteering manageable and rewarding. Most members have heavy professional commitments, so 'bite-sized' tasking is likely to be more attractive. Volunteers will be briefed on what is expected of them, how it fits the strategy, and who to speak to if they have problems. Where possible, routine tasks will be automated or contracted out to paid admin support. Outstanding volunteer contributions will be recognized. Students will be targeted as volunteers (the next generation of leadership, with time/willingness to take on career-building roles)" (2008, p. 25). (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2012)

CESBCY began to align the needs of the organization with the interests of their volunteers. This was done particularly well in the volunteer efforts supporting the 2010 CES National Conference. A large number of members stepped forward to volunteer their time in a variety of areas; including the Conference, and other Chapter initiatives. Somewhere between 75 and 100 members volunteered their (often significant amounts of) time to the Society and the Chapter. (The exact numbers of volunteers were not determined in this review, discussed below).

When asked about volunteer capacity and engagement, consulted volunteer members of the CEC highlighted the creation of a communications/marketing role, and the dozens of volunteers who stepped forward to organize and host the 2010 Conference (CESBCY, 2012). Minutes for the Annual General Meetings from 2008 to 2012 indicated that the Chapter had a full slate of officers every year since 2008 and that positions were contested in 2011 and 2012 elections to Volunteer Chapter Executive Committee (CESBCY, 2008) (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2008)(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2008)(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2008).

The development of volunteer capacity is an ongoing effort and challenge. By 2012/2013, the planned advocacy efforts for the Chapter stagnated without the planned advocacy volunteer. Similarly, the Chapter had yet to develop or fill the planned student or membership leads on its volunteer Chapter Executive Committee.

The Chapter was well served by its volunteers, particularly those bringing identified needed skills, such as financial management and marketing. An awareness of privacy laws, volunteer management, and

importantly event planning are not obviously associated with evaluation and may require specific training or support. There is little to none of the planned volunteer training envisioned in the SMP.

There are ongoing tensions between the volunteer capacity of the organization and the professional expectations of both non-volunteering members and among volunteers. As noted in the literature review, one can reasonably expect that members and volunteers would anticipate their own professional standards will be replicated by their professional association. At the same time, the need for consensus and the often slower pace of volunteer efforts can't but be characteristics of a fully volunteer run organization.

The local area coordinators continue to face significant demands and pressures to provide services and organize events, with varying degrees of support. The significant efforts of volunteers were both praised and cautioned against by the volunteer executive members. Despite the new faces in the cadre of volunteers, the potential for burn-out of volunteers identified in 2007 remains. The potential loss of corporate memory and the associated need for succession planning remain risks for the Chapter without a further increase in capacity. This is a practical, more than a theoretical issue as the Chapter lost of long time volunteers to other interests and ends of terms.

The inexact figures of volunteers who helped with the 2010 Conference and elsewhere relate in part to some volunteers helping others without official recognition, and other members who helped on an ad hoc basis, again without formal recognition. This lack of recognition was highlighted as a problem by volunteer members of the CEC. Some volunteer executive members reported feeling very appreciated, while others offered that peer recognition was rare. This is in contrast to the expectations of consulted volunteers and surveyed contacts. The need for ongoing recognition and thanks of volunteers was frequently highlighted among respondents. As noted above, the literature review similarly highlights the need for volunteer recognition and reward.

As a means to increase volunteer capacity (and commitment), the literature review describes the importance of matching interests of volunteers to organizational needs. Surveyed contacts and volunteer members provided suggestions on how to ease the demands on existing volunteers by having the Chapter provide teleconference or webinar tools for volunteers to plan events collectively (potentially by theme). This could serve to decrease potential isolation of volunteers, allow sub-committees to form around areas of interest, and spread the effort for event organization or other initiatives across a wider spectrum of people. Having standard and simple checklists for marketing as envisioned in the SMP (2008, p. 5) other for activities such as event planning, or member outreach may also be useful.

Chapter and National

While successful on a number of fronts, the 2010 Conference highlighted administrative and financial challenges that existed between the Chapter, as organizer and manager of the National Conference, the CES National Council, and its then-Secretariat service provider (Canadian Evaluation Society, 2011).

As of December 2012, the Society's National Council transitioned away from its secretariat service provider of 24 years to a new service provider (Canadian Evaluation Society, 2013). Following the transition, the structural relationship between the Chapter and the National Council did not change.

Within the 2012/2013 CES National Council, there were efforts to streamline its administrative processes. This included changes in committee structure, including some rationalization, but also the loss of an advocacy committee (Canadian Evaluation Society, 2013). Advocacy became the responsibility of the Society President, in coordination with the Communication and Marketing committee.

The 2012-2015 Strategic Plan also includes a delineation of responsibilities between the CES National Council and the Society's Chapters. The "National Council has leadership responsibility, in coordination with Chapters on the needs, design and delivery of CES programs in the Chapters. Each Chapter has an obligation to ensure that the programs are consistent with the mission and goals of CES, and meet any standards that may be established by the National Council. Access to Directors' Liability Insurance, CES courses, and usage of the CES logo and name are agreed upon aspects of this relationship" (Canadian Evaluation Society, 2013, p. 8).

Transparency

In 2007, the interaction between the volunteer members of the CEC and the wider membership was limited. Membership trends and a prior survey suggested some dissatisfaction or disinterest of CES members in the Chapter (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2007). Some 2011 survey respondents reported that the Chapter and Society appear opaque to non-volunteering members.

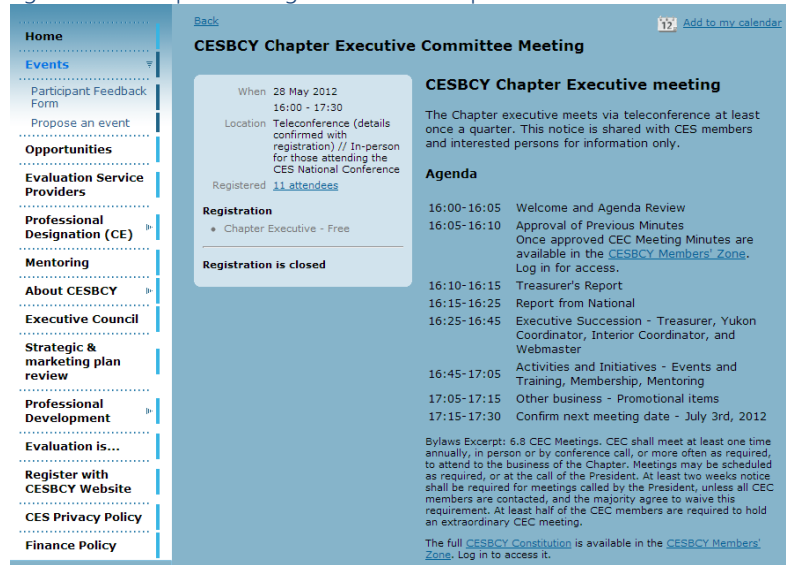
These 2011 survey respondents asked for the volunteering executive members to communicate more openly and more frequently with non-volunteering members so as to increase the Chapter's transparency and demonstrate the value of membership in the CES. This was reflected in the consultations with volunteer members who suggested increased transparency and communication of the workings the Chapter would be helpful.

There were efforts to offer more detailed communication to the wider membership on the efforts of volunteers. In 2010 to 2012, the Chapter included administrative events on the public events calendar. These events included the date, time, and agenda, for volunteer Chapter Executive Committee meetings, as well as a link to the related minutes, and in later events, the attendees list. A sample of one such event notice is included in Figure 17(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2013). This practice was short lived; the most recent of such postings was in May of 2012.

The website had the technical capacity to allow all members of the Executive to add notes (blog) and there was a forum available for members. This technical capacity was rarely used by the volunteering (or other) members.

Email blasts to interested contacts had a stronger history, with an average of 40% of recipients opening emails between 2008 and 2011/2012 – as many as 80% of members opening notices for the Chapter’s 2010 Annual General Meeting (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2013).

Figure 17 Example meeting notice from Chapter website



The relative frequency of social media on communication with members is largely dependent on the amount of information entered into the events calendar and/or the blog feature on the front page (described in greater detail in Appendix C Annotated SMP Performance Framework).

Professional designations

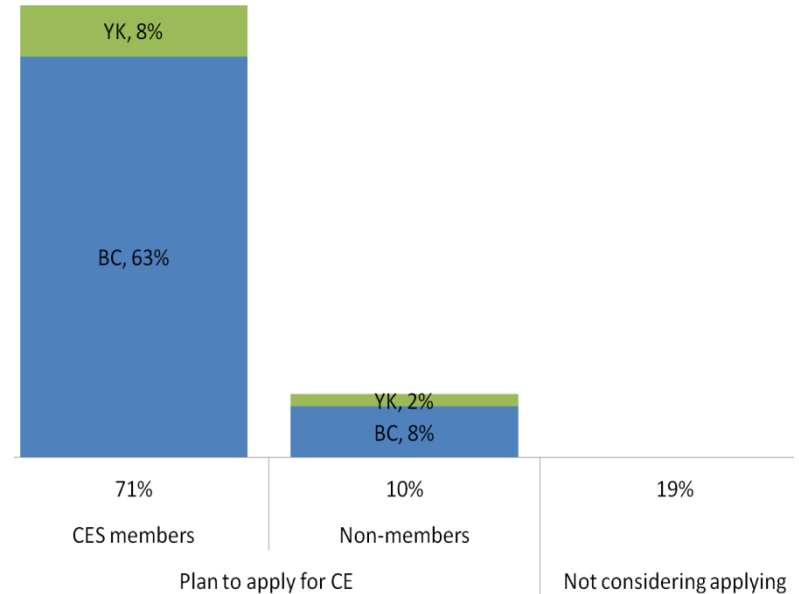
Reflecting the then ongoing work towards a professional designation nationally, SMP included an objective to ‘ensure that CES professional designations are relevant and accessible to CESBC members’ (Canadian Evaluation Society - British Columbia Chapter, 2008, p. 5). The Chapter undertook significant efforts in 2009 to ensure its members had opportunities to learn about and comment on the then-proposed professional designation program. The Chapter initiated an online discussion forum on the topic (April 1-25, 2009), a facilitated webinar (April 22, 2009) and live group discussions in Kelowna, Vancouver and Victoria, concurrent with the webinar (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009). Ideas from these fora were then provided to the volunteer committee developing the designation program.

The results of these consultations mirrored the responses from the earlier Chapter’s 2007 member survey in which Chapter members expressed interest in a credentialing process and preferred such a process to require CES membership and be based on training and experience. When the PDP program was announced later in 2009, ideas proposed with the Chapter’s consultations were incorporated into the parameters of the CE designation (Canadian Evaluation Society, 2010). There were no significant difference between the priorities of the CES members in the Chapter and the final design of the professional designation.

The 2011 survey found that over 80% of respondents (n=39 of 48) considered applying to be Credentialed Evaluators. This included 70% of CES members in BC and the Yukon who had considered applying for the CE (30 of the 39 CES members in BC and all 4 of the CES members in the Yukon) and five non-members, (see Figure 18).

This reported intent to apply in 2011 was reflected in the number of Credentialed Evaluators (CEs) from the Chapter in March 2013. By then there were 204 CEs across Canada; of these 21 (10%) were from the CESBCY Chapter (Canadian Evaluation Society, 2013). This represents a slightly higher than average uptake in the CESBCY Chapter over counterparts across the Society. Of the 1930 CES members nationally 170 (8.8%) were a part of CESBCY (Canadian Evaluation Society, 2012).

Figure 18 2011 Survey: Proportion considered applying for their CE



Mentoring

A long time pursuit of the Chapter, and one often mentioned in member surveys, is to *develop mentoring for junior evaluation stakeholders*. While the Chapter was beginning to discuss mentoring possibilities, an independently developed grassroots initiative took up the issue. Discussions and research began among local evaluators in BC on how to support mentoring began soon after the SMP came into effect. In 2009, another group of evaluators in the Ottawa area began research to scope and define a mentoring program for Canadian evaluators. A volunteer with the Chapter knew both groups of people. These two groups were introduced and began to share efforts. They took advantage of the 2010 National Conference breakfast tables, where these two groups of grassroots organizers, as well as other interested evaluators from across the country discussed mentoring. The BC and Ottawa-based evaluators went on to form the Core Mentoring Working Group (CMWG, now Evaluation Mentoring Canada, EMC).

The Chapter was aware of the grassroots initiative from its inception and offered to provide support as needed. A page of the Chapter website was dedicated to documenting the progress of Evaluation Mentoring Canada (<http://bc.evaluationcanada.ca/mentor>), (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2011).

By 2011 EMC had completed much of the preparatory work needed to establish a mentoring matching program. The Chapter then committed to provide Evaluation Mentoring Canada with funding and joint

banking services, and to coordinate record keeping. By March 2013, EMC had a pilot website in place, prepared for a full launch in June 2013, in time for that year’s CES National Conference (Evaluation Mentoring Canada, 2011).

Additional efforts

The Chapter identified 53 actions to be undertaken in its 2008-2013 Strategy, “set out in detail, on a goal-by-goal basis” (Canadian Evaluation Society - British Columbia Chapter, 2008, pp. 13-27). While many of these are noted in the above themes, it is useful to consider the collection of actions in their totality to get a sense of the breadth of effort undertaken and significant number of successes achieved.

The Chapter assigned a relative priority level (urgent, high, medium, low, desirable) to each of the 53 planned actions in the SMP. Where applicable, the need to have activities completed in advance of the 2010 Conference was also identified. In summarizing these activities, the proportion deemed to be high or urgent priorities (nearly two-thirds) is noticeable, (see Figure 19). Half of the identified actions are high priorities, while a further six of the 53 are urgent.

Of the 53 actions, there is good evidence that more than half (n=28) were completed in full by 2012/2013. A further ten (19%) had been started and/or are partially complete. In total, the Chapter volunteers were able to complete or partially complete more than 70% (n=38) of the identified actions, most of these within the first two years of the SMP. This is an extraordinary amount of successful work, made all the more impressive when one considers the work was completed on a volunteer basis.

Figure 19 Number of planned Actions completed

	Action complete and/or ongoing	Partially complete	No action taken / no evidence thereof
6 actions (11%) Urgent	4	2	
29 actions (53%) High + High 2010	14+2	4+2	4+3
14 actions (26%) Medium + Medium 2010	7+1	1+0	4+1
4 actions (11%) Low + Desirable		0+1	1+2
53 actions (100%) Total	28 (53%)	10 (19%)	15 (28%)

The individual actions are not small tasks. To provide a better understanding of which actions were fully or partially completed, see Appendix C for the full annotated performance measurement table.

Using the plan

As reflected in the significant successes described above, volunteer members were committed to achieving the goals of the Chapter. Interestingly, when asked whether they used the SMP to guide their ideas, volunteer members varied greatly in whether they used the SMP or not. Some (newer volunteers) had never read the document while others read and refer to hard copies of the document in an ongoing fashion. There was no evidence that the volunteers use the SMP collectively for annual planning or reporting to members.

As of 2013, there was no information as to whether non-volunteering members had reviewed the SMP. The Executive Summary had been available openly on the website beginning in 2009, and the full report was made available to members in an access-limited portion of the website at the same time. The website analytics indicate that pages related to the SMP have been viewed, but it was not possible to determine by whom.²² Nor were there details as to whether or how often the plan was downloaded, or by whom.

At the same time, of those volunteer members who had read the SMP, some were not aware of and/or not using the performance indicators in the SMP.²³

Of the sixty-three performance indicators linked to the goals of the SMP, information data was available on forty-one of the indicators (65%). For all of the other goals, the SMP did not fully articulate ways to measure success. There were some (thirteen) general measures without data, others (six) remained 'to be determined'. An additional three performance measures related to mentoring, which was undertaken by the EMC.

Despite the lack of consistent use of the SMP, a number of the performance indicators identified in the SMP were used and included in public reporting, notably:

- whether the Chapter has a full slate of volunteer officers, and who they were/are (Report to CES National from the BC/Yukon Chapter, 2012)
- membership figures, separating out CES members in good standing and other contacts (2007-2008 Annual Report)
- the attendance levels for events and ongoing training sessions (Report to CES National from the BC/Yukon Chapter, 2012)
- website metrics and social media reach (Report to National Council, 2009).

Additionally, the Chapter reported on indicators not included in the SMP, namely:

- the financial health of the Chapter annually (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2010)

²² Including pages referencing this Report, the various pages had 185 unique views, as of March 2013.

²³ The performance measurement matrix in Section 5 of the SMP is the basis for Appendix C of this report.

- provincial members' participation in the Conference (2010 Annual Conference, Report of the Conference Organizing Committee, 2011)
- whether Conference participants' expectations were met (2010 Annual Conference, Report of the Conference Organizing Committee, 2011)
- additional efforts of its volunteer members, e.g. Chapter members volunteering with CES-CESEF Case Competition organizing committee (Report to CES National from the BC/Yukon Chapter, 2012).

The performance information collected was prepared twice per year; once for the Chapter AGM and once as a report to the National Council for use in the Society's AGM.

Internally, volunteer executive members reviewed and discussed the above measures, as well as:

- additional details on events, namely:
 - the financial implications of a given sessions
 - the range of topics covered
 - the regional availability of events
 - feedback on the presenter / instructor
- the attendance at the CESBCY Annual General Meetings.

Volunteer executive members expressed a desire to know how many Chapter contacts (full CES members and other contacts) were taking advantage of the CES National webinar series. They also wished to know the number of CESBCY members who have received their Credentialed Evaluator designation, as a total, a proportion of the Chapter members, and a comparison to the national average.

The data collected for this report suggest that other indicators may also be useful for the Chapter volunteers, members, and other contacts. These include:

- the number of volunteer hours committed by each volunteer (to help match effort to desired workload, and to support recognition)
- the relative satisfaction of volunteers with their role in the Chapter (striving towards the 'total happiness' referenced by Harris (1998), see Literature Review below)
- how and how often volunteers are recognized
- professional and location demographics of volunteers to determine how representative the volunteer Executive members are of the membership and of the wider community of practice (e.g. industry segment, role in evaluation process, etc.)
- transparency related measures (e.g. timely updates on meeting times and agenda, whether meetings are open to non-volunteering contacts, which ideas are discussed by volunteering members, who interested individuals can contact for additional information, the results of decisions)
- whether members and contacts believe the Chapter and Society are appropriately transparent
- what members consider to be the benefits of membership, and suggestions for additional benefits

Executive members suggested that there was room to improve the Chapter's transparency and reporting practices. Some expressed an interest in publicly reporting on all agreed upon metrics at least annually, while others thought more frequently, or ongoing reporting would be helpful.

Context - 2015

The operating environment in which the Chapter finds itself in 2015 is similar to, but not the same as, the environment of 2007/2008 when the SMP was developed, nor that of 2011/2012 when data collection for the review of the SMP was undertaken.

Since that time, the federal government has launched, and evaluated its *2009 Evaluation Policy*. The evaluation found that the *Policy* supported evaluation within the federal context, increasing the breadth of programs evaluated. Among other conclusions, the evaluation found the *Policy's* requirements for full coverage combined with resource constraints led to evaluation strategies that were economical but served a narrower range of users' needs, (Gautier & Kishchuk, *Evaluation of the 2009 Policy on Evaluation*, 2015). Of note, smaller or clustered evaluations can be completed without significant field (out of Ottawa) efforts are more economical than in-person data collection from across the country.

As anticipated, while the scope and breadth of federal programming mandated for inclusion under the evaluation policy grew, overall budgets and evaluation budgets shrank slightly. It appears that the number of internal evaluators also decreased. 2012 was the last year that the federal study published an *Annual Report* on the health of the evaluation function as a public document. A search across the government electronic directory system nets 459 identifiable evaluators, a slight decrease (8%) from the 497 in 2011 (Government of Canada, 2015).²⁴ It seems that at the federal level, the constraint on evaluation is not a lack of policy imperative, but rather a resource and capacity limitation.

The recent federal election will undoubtedly impact on evaluation at the federal level. Under the prior government the long form census was discontinued, denying evaluators a significant source of reliable data and at the same time setting a chill within federal evaluation circles that work dependant on such data was not valued. Advocacy efforts that might have targeted other ideas and proposals shifted to calls for the return of the once-assumed resource. Following the most recent federal election, the new government reversed this decision announcing a reinstatement of the census in November 2015. (CBC News, 2015). In that same announcement, Minister Bains was quoted as saying, "We're focused on sound, evidence-based policies. We want to make sure we're driving good policies based on good evidence and quality data."

The overall budgets of the provincial and territorial governments have remained fairly stable. Each focused on balanced budgets or returning to balanced budgets and streamlined delivery to a greater or

²⁴ 2012 is the most recent year for which this annual report exists. Human resources listed are near identical at 500 full time (or equivalent) positions. A search for the term 'evaluation' in the Government Electronic Directory Services (GEDS) in 2015 results in 459 identified individuals. <http://sage-geds.tpsgc-pwgsc.gc.ca/en/GEDS>

lesser degree. In these cases, this is in response to decreasing natural resource rents (revenue from resource extraction that has declined in recent years). The evaluation budget, such as it was, is relatively stable. In BC and the Yukon, evaluation continues to play a smaller role than federally. There are no territory-wide or province-wide evaluation policies or requirements for evaluation. There are some isolated initiatives, such as the *Taxpayer Accountability Principles* that apply to Crown Corporations and seek to include evaluation in specific organizations, (Province of British Columbia, 2014).

Earlier consultations with the volunteer executive members indicate that full time evaluation work is rare in BC and more so in the Yukon. An online search completed in preparation of this final report found that the limited number of evaluation professionals in the provincial and territorial governments continued. 2015 online searches found 32 individuals in British Columbia and none in the Yukon.

The Chapter has continued to make efforts towards its mission that it, “will work to increase the profile and use of evaluation by engaging and supporting the evaluation community in BC and the Yukon.”

It has once again updated its website, providing an even more polished look to the online face of the Chapter. The redesign includes a welcome message, professional development calendar, mission and vision statements, as well as contact details.

The new site is based on the same structure as the old one, keeping open the option to the Chapter to collect and manage similar data as to what had been collected before.

The Chapter has maintained its social media presence, with over 2000 tweets and 216 followers on Twitter. The LinkedIn group page has 415 members. The Chapter has a presence in the Google collection of products, including a Google+ page and link to YouTube. Use of the Google tools is limited.

Significantly, November 20, 2015 was the second of two, large-scale regional conferences on evaluation held in the past two years, (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2015). This year’s day-long conference had 140 individuals registered, with a waiting list. These regional conferences serve to provide opportunities for networking and learning within the evaluation community, as well as to raise the profile and stature of the Chapter.

Further, the organizations represented and the topics covered provide additional insight into the pockets of successful evaluation in the Chapter. Forty-two different universities, foundations, nonprofits organizations, independent evaluators, evaluation consulting firms and other groups presented in 2014 or are scheduled to present in 2015, (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2014 and 2015).²⁵

²⁵ Alison Brewin Consulting, Aunt Leah's Place, BC Centre for Employment Excellence, BC Housing, BC Mental Health and Substance Use Services, BC Women's Hospital & Health Centre, Broadleaf Consulting, Canada Health Infoway, Carolyn Camman, Independent Evaluation Consultant, Catalyst Research Group, Childhood Obesity Foundation, Community Action Initiative, Community Solutions Planning and Evaluation, Doctors of

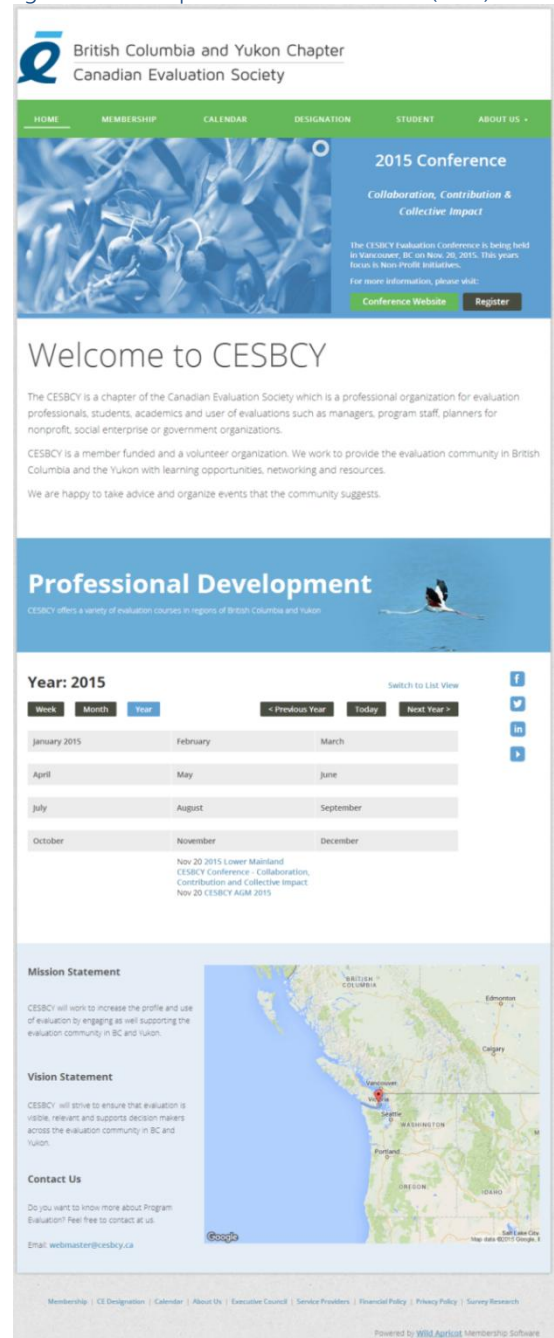
Moving forward, the Chapter committed to hosting the 2017 CES National Conference in Vancouver (Canadian Evaluation Society, 2014). Significant efforts have begun to plan and implement this major undertaking. Members of the 2010 CES National Conference Organizing Committee (COC) remain involved with the Chapter, and are available to the 2017 COC as a resource.

Evaluation is also taking a different form on the west coast. Decentralization of programs from federal to province to local governments and nonprofit organizations can shift the need for evaluation to non-governmental organizations. This decreases the need for external evaluators somewhat, but could increase the need for training on evaluation principles and ethics, data management, facilitation, and other topics.

As noted in the earlier research, the health care sector may have a stronger evaluative culture. Nonprofit and granting foundations, who may now be delivering services on behalf of governments, are also exhibiting evidence of internal evaluation cultures, as evidenced by the increased participation in this sector in Chapter events. For the independent / external evaluator, neither sector is quite large enough to support an industry exclusively. Full time external evaluators exist in BC and the Yukon, but few are able to deliver evaluation exclusively in BC and the Yukon to continue to be successful. This is truer of Yukon evaluators, who may be BC-based evaluators and include the Yukon in their delivery area.

A considerable amount of effort was undertaken at the national level of CES as well. The Society finished its strategic planning exercise, elected a new leadership, completed their transition to the new Secretariat service, reviewed and updated its By-Laws to ensure they were congruent with the *Canada Not-for-profit Corporations Act* (these were approved June 16, 2014), and updated a series

Figure 20 The updated CESBCY website (2015)



BC, Ference Weicker & Co., Fraser Health, Howegroup, Hystad Consulting Group, Interior Health, Island Health, Juniper Consulting, Junxion Strategy, Kwantlen Polytechnic University, Marla Steinberg, Independent Evaluation, Michael Smith Foundation for Health Research, Ministry of Health, MNP, Pacific AIDS Network, Provincial Health Services Authority, R.A. Malatest and Associates, Reciprocal Consulting, Royal Roads University, Science World, Simon Fraser University, Social Planning & Research Council of BC (SPARCBC), TELUS, Tindall Consulting, University of British Columbia, Vancity Community Foundation, Vancouver Coastal Health, Vancouver Foundation

of other policies and practices. What was previously referred to as National Council is now called the Board of Directors to reflect the new bylaws and in accordance with the *Act*. Some organizational changes followed, with new committees populated and responsibilities confirmed. Advocacy, which seemed lost at the end of the 2011/2012 data collection period, moved into the purview of the Society President.

Previously, members had access to group insurance for errors and omissions, and for liability. This nationally offered benefit was lost in 2011. Recognized as a gap, the CES secured discounted rates for professional liability insurance, home and auto insurance, and negotiated a series of business benefits for all CES members (Canadian Evaluation Society, 2015).

The Society also updated its own website and back-of-house information management practices, changed the logo and other aspects of the visual identity, piloted and then implemented regular webinar series, restructured the national organization, updated core CES learning materials – notably the Essential Skills Series, and hosted revenue generating conferences. This took the combined effort of many volunteers, as well as contracted services where timing and expertise were available, (Canadian Evaluation Society, 2015).

The CES Professional Designations Program continued; an external evaluation of the PDP began in mid-2015, led by the Claremont Evaluation Center (CEC) at Claremont Graduate University, (Canadian Evaluation Society, 2015). In September 2015, evaluators holding the Credential Evaluator designation were asked to update their contact information, including region.²⁶ By November 2015, 299 CE holders had updated their information; 35 of whom were from British Columbia and the Yukon. At 12%, this is a slightly higher ratio than the 21 of 204 from 2013.

Some prior changes to the Canadian Journal of Program Evaluation (CJPE) were reversed. In 2009, the CJPE ceased to be a member-only benefit and became available free online to all (Canadian Evaluation Society, 2013). This policy was updated, such that the three most recent editions of the CJPE are members-only. As a rule, this means the journal is made available publicly roughly nine months after it is available to members (Canadian Evaluation Society, 2015).

Outside of the CES, the grassroots mentoring working group continued its efforts; freeing the Chapter from dedicating additional volunteer capacity to a project considered a priority by members. The grassroots group finalized the project, launching a website with matching of mentors and mentees using the CES Competencies for Canadian Evaluation Practice as a filter through to identify needs and capacity. “In 2015, the Canadian Evaluation Society (CES) took over the responsibility for Evaluation Mentoring Canada and renamed the initiative as the CES Mentoring Initiative (pilot) to take the service to a new level” (Evaluation Mentoring Canada, 2015). The cost of membership in the Society is now \$195 for an individual membership, from \$125 in 2007/2008 (Canadian Evaluation Society, 2015).

²⁶ In compliance with the *Privacy Act*, the Society did not auto-populate that information.

Conclusions and recommendations

There were two related objectives for this project:

- to complete a review of the CESBCY's 2008-2012 Strategic and Marketing Plan (SMP); and,
- provide recommendations to the Chapter for its future strategic planning and ongoing management.

These were further delineated into key research questions, each of which is answered below.

What can the CESBCY learn from the literature on effective strategic planning and implementation?

The literature highlights the specific challenges that organizations such as the CESBCY –volunteer run nonprofit, professional organizations – face when developing and implementing a strategic plan, and the related challenges of managing such an organization.

The pre-eminence of the volunteering member is essential to understanding CESBCY's collective capacity, and its goals and objectives. In volunteer run professional organizations, members are “the legitimating body, contributors, volunteer members, clients of services, and beneficiaries of public goods provided by the association” (Schwarz, 2005).

Volunteering members, particularly those in leadership roles “[must] pay close attention to motivation and managing [volunteer] members to ensure that tasks essential to organizational survival are accomplished, (Bettencourt, Dillman, & Wolman, 1996 and Harris 1996). At the same time, and herein lies the challenge, volunteers have few levers with which to motivate each other, and volunteering members do not generally expect to be managed, controlled, monitored, or subjected to the norms or hierarchical bureaucratic structures (Rothschild-Whitt, 1979).

A volunteer professional association faces specific challenges, separate from other nonprofit organizations. Volunteers and other members have professional standards in their own working life, which they may assume will be replicated in their own professional association. At the same time, peer managed, volunteer organizations operate with a different decision-making structure that is highly democratic and consensus-based. The time needed for decisions and the pace of effort in a volunteer run association is slower than in paid, professional work space. Volunteers' time is more limited and may produce a less polished, more conversational outputs than in their work places. Volunteer professional associations should anticipate a tension between expectations of paid, professional work and the capacity and time limited effort inherent in volunteer organizations. Managing these tensions poorly can lead to volunteer time and effort being under appreciated, limiting the recognition and support for volunteers.

The literature tells us volunteers may leave if they aren't completely satisfied with their experience, (Oropesa, 1995 as cited by Harris, 1998). *Completely satisfied* is a very high bar to meet. The loyalty of volunteers is an ever-present concern for an association dependant on their capacity, and availability. Understanding each other's motivation may be helpful. Within professional associations volunteers are

most likely to be influencers, helpers, community oriented, success focused, or some combination thereof (Wilson, 2012, p. 180). As goals are developed care must be taken to identify existing and potential volunteers who could reasonably be expected to undertake the associated activities. Priorities may need to change to accommodate the capacity of those who come forward to volunteer.

The literature provides good standards by which to gauge a good strategic plan. These include:

- a single, consistent vision for the organization
- fundamental issues facing the organization are reflected clearly in its purpose, vision, and associated strategies
- is appropriate resourcing - both financially and one with realistic expectations of volunteer capacity
- responds to external trends affecting the organization and its mission
- is action-oriented and has specific implementing strategies
- is outcome focused on positioning the organization favourably for the future
- includes performance measures and targets, and a responsibility to report on progress,
- it is one that is used to manage changes in critical times

For future planning efforts Bryson's (2004) model provides the greatest clarity of on how a nonprofit should plan strategically. It has ten steps, each requiring discussion and consensus.

1. "Initiate and agree on a strategic planning process.
2. Identify organizational mandates.
3. Clarify organizational mission and values.
4. Assess the external and internal environments to identify strengths, weaknesses, opportunities and threats.
5. Identify the strategic issues facing the organization.
6. Formulate strategies to manage the issues.
7. Review and adopt the strategies or strategic plan.
8. Establish an effective organizational vision.
9. Develop an effective implantation process.
10. Reassess the strategies and the strategic planning process" (pp. 33-34).

Also available to the Chapter, seven of the characteristics of successful nonprofit leadership identified by Herman and Renz (2000) can be applied to small, volunteer-run, professional associations, these were;

1. The use of a board manual
2. All board members have office or committee responsibilities
3. Written policy specifying roles and powers of Executive Committee (in our case, this is a collection of volunteer-members who've committed to longer term positions)
4. Board uses consensus decision-making process

5. Orientation for new members
6. Written policy about attendance at board and committee meetings
7. Written policy on dismissal for absenteeism.

Had the environment changed?

The Chapter's operating environment changed slightly from that in 2007/2008. Within BC and the Yukon there are pockets of an evaluation-supportive culture. There are still no territory-wide or province-wide evaluation policies or requirements for evaluation, but there are some isolated initiatives.

Other activity levels indicate that the community of practice in British Columbia and the Yukon has a foundation on which to grow, notably in health care authorities, universities, granting foundations, nonprofit organizations, a few government organizations, independent evaluators, and evaluation consulting firms.

The online presence of the Chapter's website and social media presence increased the breadth of the Chapter's reach. At the same time in person meetings provided, and continue to provide, opportunities for deeper connections through increased networking, shared learning, knowledge transfer, and identification with CESBCY. This increased breadth and depth provides a foundation for an evaluation community of practice.

The Chapter successfully identified a number of organizations with pockets of evaluation culture, as evidenced most obviously by presentations at regional evaluation conferences. Forty-two different organizations, including health care authorities, universities, granting foundations, nonprofits organizations, a few government organizations, independent evaluators, evaluation consulting firms, and other groups presented in 2014 or are scheduled to present in 2015.

In 2007/2008, the Chapter faced a relatively consistent membership of fewer than 150 people in BC. By 2013, there were 170 CES members in BC and the Yukon, a 17% increase. There is limited evidence that the Chapter had a slightly better retention rate of new members since the implementation of the SMP. In addition to the increase in CES members, the Chapter began to track its non-member contacts (those who had registered with the website, attended an event, or otherwise purposely shared their contact details with the Chapter). By March of 2013, the Chapter had 595 contacts across BC, the Yukon, and one CES member in Alaska.

More recent numbers were not available in time for this report, but the other activity levels indicate that the community of practice in British Columbia and the Yukon has a foundation on which to grow. Most recently, the Chapter hosted two sold out regional conferences (2014 and 2015). Moving forward, the Chapter committed to hosting the 2017 CES National Conference in Vancouver.

There is a consistently stronger evaluation culture in the federal government, although the evaluation function has been troubled in recent years. The federal *2009 Policy on Evaluation* was implemented, and later evaluated. The report was produced by the *Centre of Excellence for Evaluation*, in collaboration with Natalie Kishchuk, CE, of Program Evaluation and Beyond Inc. and Benoît Gauthier, CE, of Circum Network Inc.. Federal evaluation budgets shrank slightly, as did the number of federal evaluators. Combined, the result was more evaluation coverage with fewer people and smaller budgets which led to evaluation strategies that were “economical but served a narrower range of users' needs.”At the federal level, the constraint on evaluation is not a lack of policy imperative, but rather of resource and capacity limitations. The recent (2015) federal election will undoubtedly impact on evaluation at the federal level, although it is too soon to determine how.²⁷

The CES Professional Designations Program was established in 2010, which oversees the Credentialed Evaluator (CE) designation, along with the associated Competencies for Canadian Evaluation Practice (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009). An external evaluation of the PDP began in mid-2015. By November 2015, 35 CESBCY members have acquired their Credentialed Evaluator designation (of 299 CEs in Canada) at a rate slightly greater than its proportion of national membership.

A national mentoring program was established by a grassroots organization, with support from CESBCY and its members. The grassroots group negotiated with CES in 2015 to take over the ongoing management of the mentoring project. Currently the now CES-managed mentoring program has been renamed the *CES Mentoring Initiative (pilot)*.

CES adopted the Program Evaluation Standards developed by the Joint Committee on Standards for Educational Evaluation, (Canadian Evaluation Society, 2013). CES provided financial support to both the Consortium of Universities for Evaluation Education (start-up funding), and the CES Education Fund (ongoing support), (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009).

All of this was completed with volunteer effort from across the country, including a portion from CESBCY. CESBCY volunteers undertook a huge range of activities, described in greater detail below.

Most recently, the Chapter hosted two sold out regional conferences (2014 and 2015). Moving forward, the Chapter committed to hosting the 2017 CES National Conference in Vancouver.

Did the five goals continue to resonate with and across the membership? Were any changes to these goals sought by the membership?

The goals in the SMP are:

²⁷ Campaign promises included reinstating the long-form census, use of evidence-based decision making in a program review and elsewhere, increased public access to information, accelerated and expanding open data initiatives, the establishment of performance standards, gender impact assessments, etc. that could affect evaluators and the use of evaluations, (Liberal Party of Canada, 2015).

1. BC and Yukon evaluation stakeholders belong to a Community of Practice.
2. BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.
3. CESBCY has the organizational capacity to achieve the other goals.
4. CESBCY is seen as the leader of the BC and Yukon evaluation community of practice, representing all sectors and stakeholders across the province.
5. Evaluation makes a positive contribution to decision-making in BC and the Yukon.

By and large the goals resonated with the membership. Members offered suggestions for the future; in order of most frequently suggested, those not yet complete are:

- letting go of the local coordinators in favour of collective events planning,
- use of teleconference or webinar tools to organize and host events,
- more frequent and more open communication with non-volunteering members,
- develop events bases on a needs assessment
- tie events to the credentialing needs,
- focus specific effort on member and volunteer recruitment and retention, and
- report annually on the Chapter's goals and objectives.

Which activities had the Chapter undertaken? What successes had been achieved by the Chapter?

The most significant effort undertaken by the Chapter under the SMP was to host the 2010 CES National Conference in Victoria (May 2-5, 2010). Despite fears of low turn-out and financial losses during an economic downturn, the Conference attracted 422 registrants and was a financial success.

The Chapter identified 53 desired actions for themselves in the SMP to achieve the five goals. As of 2012/2013, more than half were completed and nearly twenty percent were partially complete. For an all-volunteer effort the sheer volume of good work done must be acknowledged and should be celebrated. Beginning with few volunteers, little engagement, and few financial resources in 2007, the Chapter marshalled significant volunteer efforts to achieve many of its goals, making progress on others.

The website was updated significantly (twice), improving member engagement and visibility. There are strong indications that the website positively impacted the Chapter's visibility and contributed to the communication between members and the Chapter. At the same time, there is good reason to believe that the increased transparency initiated by the Chapter succeeded in engaging the membership and increased the number of individuals who stepped forward to volunteer.

Immediately prior to the development of the SMP, Chapter events had inconsistent and at times low attendance. Between 2009 and 2013, the Chapter promoted or hosted 155 training and networking events, 72 of which were offered by the Chapter directly. In-person training was offered ninety times across the Chapter. In addition to events in smaller regions, roughly a third of the events were online events,

accessible to members throughout the Chapter. Most recently, the Chapter has added annual one-day conferences, which have each sold out. These events provided attendees with increased networking and professional development opportunities. The courtesy postings from other organizations increased the profile of CESBCY, and allowed the Chapter to provide members and others with a significantly greater breadth of opportunities; beyond what the Chapter could have offered on its own.

The Chapter made the decision in the development of the SMP to service as much of the evaluation community as possible, to encourage non-members to join, to expand the networking and learning opportunities for members, to help develop a community of practice. The Chapter increased its reach four times. There were 145 Chapter members before SMP. By March of 2013, the Chapter had ongoing contact with nearly six hundred people of the wider evaluation community (170 CES members and 425 non-member contacts).

What barriers had the Chapter faced? Were / how were these overcome?

The Chapter used an array of strategies to reach a dispersed membership, including online tools, social media, and email blasts from within the updated website.

Volunteer capacity and its limits were a challenge. Many of the executive members and volunteers for the 2010 Conference were drained following the conference, risking a sudden stop to Chapter activities. A small number of Chapter volunteers did not commit time to the conference, but instead focused on post-conference events and activities. These volunteers were able to support the Chapter while colleagues took a well deserved break. Chapter activity and events continued without the sudden stop.

Interestingly, the six hundred people of the wider evaluation community were dispersed across communities and across BC and the Yukon. The distributed nature of the members and non-members necessarily shapes the planning and management of the Chapter. Online events, electronic communication, multi-site delivery of events, and higher value in-person professional develop (something worth travelling for), are all strategies employed by the Chapter.

The changes to the website allowed for more efficient promotion of the Chapter and communication with the membership, including volunteer opportunities. More, small and mid-sized events were held to serve other goals in the SMP, but with the added benefit of providing in-person opportunities to solicit for volunteers. The Conference provided a tangible project to which volunteers could commit. Collectively, these efforts, along with direct appeals from existing volunteers increased the rolls.

Advocacy remains a challenge. Efforts were initiated, and little more than incremental progress was seen. The planned for advocacy volunteer was not identified and the effort stagnated. Advocacy, particularly including a hoped for provincially-mandated evaluation policy, may be as big of an effort as the conference. Motivating the same level of volunteer effort for advocacy concurrent to other initiatives may have been overly ambitious.

The Chapter was well served by its volunteers, particularly those bringing identified needed skills, such as financial management and marketing. An awareness of privacy laws, volunteer management, and importantly event planning are not obviously associated with evaluation and may require specific training or support. There is little to none of the planned volunteer training envisioned in the SMP.

The Chapter worked to thank and acknowledge its volunteers, but experienced some gaps on this front. A minority of core volunteers, conference volunteers, and ad hoc volunteers were unrecognized; the names of some not recorded, while others were simply forgotten.

As found in the literature review, dissatisfied volunteers may simply leave. The importance of aggressively thanking volunteers cannot be underestimated.

Was the SMP a useful tool for Chapter management and planning? How could CESBCY know it was successful? Were the progress measures used? Did the progress measures capture successes and challenges accurately?

Volunteer members varied greatly in whether they used the SMP or not. Some (newer volunteers) had never read the document while others read and refer to hard copies of the document in an ongoing fashion. There was no evidence that the volunteers use the SMP collectively for annual planning or reporting to members. Nonetheless, the Chapter regularly reported on a number of the performance indicators included in the plan.

Recommendations

First and foremost thank and congratulate the volunteers for the significant efforts undertaken and successes achieved in support of the goals reflected in the Strategic and Marketing Plan, and the Chapter generally. Volunteers can never be thanked too often.

The Chapter has committed to hosting the 2017 CES National Conference. Conference organizers have many resources on which to draw, including evaluation reports of past conferences, and the corporate memories of past or existing volunteers. The SMP and this report should be shared with those volunteering to organize the 2017 Conference so that they may be briefed on the other supporting activities the Chapter undertook in advance of the 2010 Conference.

Further, the Chapter should encourage a subset of volunteers to focus their efforts on goals and activities unrelated to the conference which extend past the conference dates. This will mitigate the known risk of volunteer burnout and prevent the crashing halt to momentum generated by the conference.

Member services

Significant numbers of in-person and online training events were offered to member and non-member contacts, which were well received and attended. The Chapter is unlikely to be able to provide similar

number benefits and events without the courtesy posts of other organizations. The Chapter should continue to share these event notices whenever possible.

The chapter had experience in providing a large number of small to medium sized in person events and experience producing larger, regional and national conferences. Moving forward, the Chapter has a significantly more depth in its volunteer corps from which to develop events and member benefits. The CESBCY members and executive will need to decide collectively which delivery model is of most benefit to the membership and Society, and which is most attainable with the available volunteer contingent. The distributed nature of the members and non-members necessarily shapes the planning and management of the Chapter. Online events, electronic communication, multi-site delivery of events, and higher value in-person professional develop (something worth travelling for), are all strategies available the Chapter.

The Chapter worked hard to ensure that the Core Competencies of the PDP and the CE designation incorporated the concerns and needs of the membership. There is a solid uptake rate of CE applicants and designates. Regardless of which delivery model the Chapter and its members eventually decide on, events and other efforts should (continue to) clearly enunciate which of the Core Competencies are addressed.

Transparency

How the Chapter operates, self manages, and reports to its members and publicly is of interest to the membership. It is not unreasonable to conclude that sharing such information provided additional opportunities for the Chapter to further the attachment between members and the Society. Sharing agendas, minutes, reports, and volunteering opportunities – particularly in frequent, small bursts – would serve to make the Chapter more transparent.

Communities of evaluation of practice

There are or have been elements of successful communities of evaluation of practice in British Columbia and the Yukon. CESBCY is encouraged to acknowledge these and support these efforts further.

- The Chapter established a number of arenas for individuals to connect, learn from each other, and network. Notably the in-person and online professional development events. Continuing to offer events frequently enough that those relationships can be maintained.
- There Chapter's ability to support a community of practice and to raise its own profile was due in part to the decision to service as much of the evaluation community as possible. The Chapter is encouraged to continue engaging with the larger evaluation community in BC and the Yukon, both members and non-members. The Chapter is encouraged to continue its focus on the whole of the evaluation community in BC and the Yukon, inviting the participation and interest of non-members.

- As of 2013, the Chapter reached over four hundred non-member contacts. These individuals had sufficient interest in evaluation to attend at least one event. Serious consideration should be given as to whether these individuals should or could be encouraged to become full members of the CES. As part of the wider evaluation community of practice, they offer shorter but more frequent and varied interactions with the CES members in BC and the Yukon. Continuing to engage adds breadth to the community of practice.

Advocacy

The good thinking on advocacy and the more suggestions from on potential next steps provide a solid foundation for future advocacy efforts. With clear goals and a targeted effort – perhaps not dissimilar in scope to that provided when the Chapter’s online was established – may be necessary. This is not a small project and needs a champion and a team. Given the potential for significant volunteer time and effort, the Chapter may benefit from a substantial discussion of whether and how to proceed. There is good reason to suspect policy change and changes in practice are possible with a well thought out, focused advocacy effort. The starting point would be to renew and review the advocacy related activities in the SMP, these were well researched and well thought out. From there audience specific goals can be established.

Volunteer management

The specific characteristics on volunteer management and support in volunteer run nonprofit, professional organizations surfaced as an essential priority across all areas of investigation. Volunteer recruitment, management, ongoing support, and appreciation are the foundation of CESBCY's success. The lessons from the literature, and feedback from members, including past and ongoing volunteers, provided inspiration on how to do this better:

Recruitment

- Be prepared for ongoing volunteer recruitment. The Annual General Meeting (AGM) provides a formal and predictable opportunity for volunteers to step forward and participate. This does not prevent additional volunteers from stepping forward to contribute in-year towards a given initiative. While all volunteers may attract additional volunteers, it is important to have a designated individual (i.e. the Chapter President) responsible to formally welcome a new volunteer and introduce them to the rest of the team.
- Know volunteers’ motivations (influencers, helpers, community oriented, success focused), topics of interest, areas of expertise, past volunteer history, anticipated availability. The better volunteers understand each others’ capacity and reasons for being a part of the group the more likely that they will be able to facilitate each others’ efforts. This can be done formally, immediately following the AGM.

- Selection criteria is a benefit to the recruitment process, including an opportunity for volunteers to indicate their preferences for working alone or in teams, relative availability, and skills they are hoping to offer. This is an opportunity for volunteers to describe their own motivation for coming forward. As priorities are set and new initiatives identified, documenting and sharing the anticipated volunteer needs is beneficial to both finding a new volunteer and providing scope for the volunteer's efforts.
- Identify the range of volunteer opportunities (start with the association's mandate and its strategic priorities; describe the tasks; and establish the qualities needed for each task). Group tasks together (identify and describe discrete volunteer assignments), but be willing to reshuffle these to accommodate the idiosyncrasies of volunteers as they come forward. This should be done as part of the AGM preparation, as priorities are set for the immediate future (following quarter) and year.
- When offering volunteer opportunities include not just the specific tasks that need to be accomplished, but also the character traits most likely useful (e.g. extraverted, detail oriented, etc.) and whether the task can be shared. Include estimations of how long tasks have taken prior volunteers. If should be done prior to the AGM and shared with members as part of the recruitment of new volunteers.
- Embrace sub-committees. The greatest risk to the CESBCY is volunteer burn out. Every member that steps forward to volunteer can be accommodated on the CEC or a sub-committee.

Orientation

- CESBCY by and large uses a consensus decision-making process. Overtly recognize that consensus decisions can take longer. Include that in planning, recruitment, and orientation of volunteers.
- Once a volunteer has come forward, have a written description of their role, including the opportunity for the volunteer-member to take initiative, make decisions, or ask questions. Priorities may need to change to accommodate the capacity and interests of those who come forward to volunteer, but these should be documented. This also helps with recognition (discussed later) as it allows thanks to be individualised and specific.
- Provide volunteers with in-person (or live on the phone) orientation to CESBCY and training on the role that they are going to fill. Ideally, this is from a predecessor or someone with memory of why decisions were made, and actions were or were not taken in the past.
- Brief the new volunteer (and annually remind existing volunteers) of their legal, ethical, and fiduciary responsibilities.
- Brief the new volunteer (and annually remind existing volunteers) of the Chapter By-laws, and those of CES nationally, as well as the relationship with CES nationally and other Chapters.
- Provide volunteers with a list of which resources are available (or not) to support their efforts
- Introduce volunteers to paid staff to clarify the role of paid staff in the association.

- Much of the (re)orientation can be provided collectively in-person, immediately following the AGM. This helps to facilitate shared understanding and opportunities for clarification.

Scope

- Volunteers need to be confident that they will succeed. This is supported through clear, shared understanding of goals.
- For new volunteers, or those taking on new duties, working with another volunteer (e.g. job shadowing, mentoring, team activities) and regular contact with another volunteers are useful.
- Some volunteers are looking for social interaction. Activities that can be accomplished by one person may be best shared between two who are not looking to volunteer alone.
- Some volunteers are motivated by the opportunity to achieve change. These volunteers well matched to discrete initiatives with clear end states.
- Volunteers hoping to influencer others are well placed in advocacy, policy and governance roles.
- Community oriented volunteers are well placed in teams working on significant initiatives, regional conferences, webinar development, etc.
- Small teams serve two purposes, to provide in-team back up for work load, and opportunities to build deep professional relationships. Larger teams take more coordination but can achieve more.
- Make space for episodic volunteering that is short-term or even one time, with very clear deliverables and time frames.
- Have a shared and written understanding of responsibilities to attend meetings that is realistic and respectful of volunteers' time.
- Ask volunteers to track hours of effort both the duration (to prevent burn out), and the time of day (so others know when best to reach out to offer/ask for support).
- The tensions between professional standards and the capacity of a volunteer organization should be overtly recognized in the identification of volunteer opportunities and in a written description of the roles assumed by volunteers.

Support and recognition

- Schedule regular contact between volunteers and regular opportunities for appreciation and recognition.
- Make volunteer recognition a specific task, designating an individual (i.e. Chapter Vice President) to ensure at least ten percent of the volunteers are individually thanked each month. Ideally, these are in-person or telephone conversations. These help to motivate volunteers, provides an opportunity for volunteers to talk through ideas, or provide feedback on how the Chapter is doing more generally. This can also help to keep volunteers focused, and provide an opportunity to see if individual volunteers are under/over burdened.

- Provide certificates for training, reference letters, and other documentation of the volunteers' efforts annually. Support and recognition is good for the volunteer, and is the most successful tool to engendering loyalty to the Chapter.

Reflection

- Provide an opportunity (perhaps annually) for the volunteers to collectively and individually reflect on the work they are doing together and individually. This can be timed to be part of the AGM or a separate point mid-year. Ensure that the organizational identity is shared. Regardless of how much capacity a given volunteer has to commit to the organization, they must have a shared understanding of what the organization is and where their efforts fit. They must take the time to confirm they share an understanding of what the organization is, what it does and how it does it.
- This is a good time to collectively reflect on whether tensions between professional standards and volunteer capacity have surfaced.
- At this annual point, reconsider targets and time frames for the goals yet to be tackled. Can initiatives be matched to the interests and capacity of the volunteers? Is there a champion willing to commit to a specific goal and personally support others to achieve it, or is it unrealistic with current volunteer capacity? For outstanding initiatives, either set aside the ideas and resources until a suitable volunteer comes forward, or actively seek out volunteers willing to commit their our efforts, and if necessary to recruit additional volunteers.

Strategic planning

The Chapter's achievements under the 2008 – 2013 Strategic and Marketing Plan are more than significant. Looking at the starting point, with a small group of core volunteers and an at time disengaged membership, the achievements are all the more impressive. The Chapter is highly encouraged to develop a new five year strategic plan.

The Chapter once again finds itself two years from hosting a national conference; this time with much better footing. As an anchor for the next five year plan, the Chapter is well placed to develop a focused and concrete set of goals, objectives, and activities.

Going forward CESBCY should explicitly enunciate the needs of the members individually, non-members, and the Chapter.

In reviewing the long list of accomplishments made by the Chapter, volunteers should revisit those in which the Chapter made limited or no progress. As part of a renewed strategic planning process, members should be asked whether these remain priorities for the Chapter and its volunteers. Were they (a) a 'nice-to-have' goal or (b) sought after too soon in the life of the Chapter? If these goals are renewed, which resources would be committed? Which indicators would be used to report progress?

When developing a new five year plan, the Chapter can review the list of accomplishments achieved under the 2008 – 2013 plan to develop a sense of scope.

This project identified a number of goals and indicators to be considered in the development of a new five year plan. Some were reported on, but not included in the 2008 – 2013 SMP while others were suggested by members as needed for annual planning and reporting.

Membership

- Demographics of volunteers versus the membership: to determine how representative the volunteer members are of the membership and of the wider community of practice and whether there are gaps that can be targeted, (e.g. industry segment, location, role in evaluation process, etc.)
- Number of CESBCY members who have received their Credentialed Evaluator designation (this is available on the CES national website and could be easily added to a Chapter annual report)
- whether members and contacts believe the Chapter and Society are appropriately transparent
- what members consider to be the benefits of membership, and suggestions for additional benefits

National events

- How many Chapter members and non-member contacts take advantage of the CES National webinar series: to determine gaps in webinar programs, and in-person learning opportunities
- Chapter members' participation in the national conference: are their presenters at other conferences who would be available to either trial it locally or repeat it following a national conference
- Whether conference participants' expectations were met (can apply to both national and regional conferences): to support better service delivery

Local events

- The financial implications of a given event: looking for efficiencies and outliers
- Event attendance, feedback on the presenter or instructor, range of topics covered: to compare interest with topics and identify whether events should be repeated
- Regional availability of events: although not explicitly enunciated in the SMP, volunteer members worked to ensure that professional development opportunities were available to members across the Chapter.
- Attendance at the CESBCY Annual General Meetings

Transparency related measures

- whether members and contacts believe the Chapter and Society are appropriately transparent
- timely updates on meeting times and agenda
- whether meetings are open to non-volunteering members
- which ideas are discussed by volunteering members
- to whom interested individuals can contact for additional information

Volunteers

- the number of volunteer hours committed by each volunteer (to help match effort to desired workload, and to support recognition)
- the relative satisfaction of volunteers with their role in the Chapter (striving towards the 'total happiness' referenced by Harris (1998), see Literature Review below)
- how and how often volunteers are recognized
- with permission, professional and location demographics of volunteers to determine how representative the volunteer Executive members are of the membership and of the wider community of practice (e.g. industry segment, role in evaluation process, etc.

Final words

This concludes the body of the report. This project was intended to be a contribution to the ongoing process of setting strategic directions for the BC and Yukon Chapter of CES. The details included here are built on the desk research, the literature review of the context for volunteer-led professional organizations like the Chapter, and of course, on the many and varied comments provided by CESBCY members, volunteers, and other stakeholders. The recommendations and suggested activities reflect these sources and the author's involvement and experience as a professional evaluator. The reader is encouraged to review the appendices for details on methods and findings. The final appendix is a totalling of the many accomplishments the Chapter volunteers had in a few short years. The volunteers are to be congratulated. Once again, without the assistance and support of many people, notably the volunteers and the Chapter members, this research project would not have been possible. They are much appreciated and thanked.

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Appendices

Appendix A. Timeline

This timeline is provided to provide interested readers with significant dates in the recent development of the CESBCY Strategic and Marketing Plan. By means of full disclosure, I have included my history with CESBCY. I joined CES in 2002 and have volunteered with the Society in a variety of ways over the years. I have made a note of any instances where I was party to a related action or decision.

Time frame	CESBCY SMP related activities	Author's CES related activities
2002		<ul style="list-style-type: none"> Joined the Canadian Evaluation Society, began volunteering with the CES Student Case Competition in the National Capital Region.
2004		<ul style="list-style-type: none"> Moved to British Columbia Became an observer to the CESBC Executive Committee.
2005 - 2007		<ul style="list-style-type: none"> Became a member-at-large for the CESBC Executive Committee.
2007 January Spring-Summer	<ul style="list-style-type: none"> Discussion Paper on Advocacy for the BC Chapter, CES prepared by the Volunteer Chapter Executive. CES National Council oversaw the development of the Core Competencies for Evaluators that later formed the foundation for the Credentialed Evaluator (CE) designation. 	<ul style="list-style-type: none"> Continued as CESBC member-at-large.
September	<ul style="list-style-type: none"> CESBC Executive Committee decided to undertake a strategic planning process. 	<ul style="list-style-type: none"> Became the local area coordinator for CESBC in the Lower Mainland.
September	<ul style="list-style-type: none"> Request for proposal: CESBC Strategic and Marketing Plan. 	<ul style="list-style-type: none"> Was on the SMP proposal review committee and the Steering Committee for the development of the SMP.
October	<ul style="list-style-type: none"> Proposals received and accepted. 	
2008 January May	<ul style="list-style-type: none"> SMP received by Volunteer Chapter Executive and shared with membership electronically. CESBC Executive presented its strategic planning process and final SMP to the CES National Conference. 	<ul style="list-style-type: none"> Presented the CESBC SMP at the CES National Conference.
October	<ul style="list-style-type: none"> First CESBC Annual General Meeting of the SMP. 	<ul style="list-style-type: none"> Became Vice President (VP) of the CESBC Chapter.
2009	<ul style="list-style-type: none"> CES consultations on professional designations The Credentialed Evaluator designation announced at 2009 CES Annual Conference in Ottawa. 	<ul style="list-style-type: none"> Continued as VP of the CESBC.
March	<ul style="list-style-type: none"> New website service identified and redevelopment of the website undertaken by volunteers. 	<ul style="list-style-type: none"> Became one of three volunteers who set-up the CESBC website.
April	<ul style="list-style-type: none"> Revised website launched. First events listed on Chapter website: Consultations on CES National development of Credentialed Evaluator designations. 	<ul style="list-style-type: none"> Participated in and occasionally helped organize events, including consultations related to the development of the CE designation.
July	<ul style="list-style-type: none"> CES Chapter restructuring. 	

Time frame	CESBCY SMP related activities	Author's CES related activities
September	<ul style="list-style-type: none"> • CESBC welcomes members from Yukon • Local representative for the Yukon identified. 	
October	<ul style="list-style-type: none"> • The Chapter name was changed to CES British Columbia and Yukon at the 2010 CESBCY Annual General Meeting. 	<ul style="list-style-type: none"> • Became Chapter representative to the CES National Council.
2010	<ul style="list-style-type: none"> • At the 2010 CESBCY AGM, the By-laws were formally updated to include the membership of the Yukon (this corrected a technical oversight from the prior years where the changes were agreed to in principal, but the specific word changes to the by-laws weren't made).(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2010). 	<ul style="list-style-type: none"> • Became the sole volunteer webmaster for the CESBCY website. • Continued my role as Chapter representative to the CES National Council.
May/June	<ul style="list-style-type: none"> • At the 2010 CES National Conference Francois Dumaine (CES National President) announced the official launch of the Credentialed Evaluator (CE) program. 	
2011	<ul style="list-style-type: none"> • 2008-2012 Strategic and Marketing Plan Review & Update proposed to Chapter Executive. 	<ul style="list-style-type: none"> • Proposed the scope of the SMP Review and offered to complete the work on a volunteer basis. • Continued my role as volunteer webmaster for the CESBCY website.
June		<ul style="list-style-type: none"> • Resigned as Chapter representative to the CES National Council.
September	<ul style="list-style-type: none"> • SMP Terms of Reference finalized and research begun. 	
2012	<ul style="list-style-type: none"> • 	<ul style="list-style-type: none"> • Moved out of country • Resigned CESBCY, found a replacement webmaster.
2013	<ul style="list-style-type: none"> • SMP Review and Update experienced unforeseen interruptions, delaying the project. 	<ul style="list-style-type: none"> • Qualified and received CE from CES.
2015	<ul style="list-style-type: none"> • SMP Review and Update Finalized. 	<ul style="list-style-type: none"> • Continued the SMP Review and Update.

Appendix B. Collected data

To develop this report, I undertook the following data collection methods,

- A literature review;
- A review of documents used to prepare the original SMP as well as others developed in the intervening years;
- Online research to supplement the other data collection processes;
- A review of website data and metrics;
- Consultation with past and present members of the Volunteer Chapter Executive Committee, including the committee chairs for the 2010 CES Conference; and,
- A survey of members in 2011, including a number of questions from the 2007 Chapter member survey, thereby allowing for comparison across time in the analysis.

A research framework is included in Figure 21 to denote which of the research questions aligns with which of the data sources.

Figure 21 Research framework

	Literature review	Document review	Online research	Website review	Consultations with CEC	CESBCY member survey
Has the environment changed?		✓	✓		✓	✓
Do the five goals continue to resonate with and across the membership? Are any changes to these goals sought by the membership?					✓	✓
Which activities has the Chapter undertaken? What successes have been achieved by the Chapter since 2008?		✓		✓	✓	✓

	Literature review	Document review	Online research	Website review	Consultations with CEC	CESBCY member survey
What barriers have the Chapter faced? Were / how were these overcome?		✓		28	✓	✓
Is the SMP a useful tool for Chapter management and planning? How do we know we were successful? Are the measures being used? Are the progress measures capturing our successes and challenges accurately?	✓	✓	✓	✓	✓	✓
What can the CESBCY learn from the literature on effective strategic planning and implementation?	✓					

A full description of the data collection process and summary of the data identified through each of these methods is provided below. Following each description is a detailed summary of the process by which this data was collected. Analysis and implications of this data is included in the main body of this report.

Literature review

Within the literature review resources were reviewed to address two revised²⁹ research questions, namely:

1. How can volunteer-run organizations (in particular, nonprofit, professional associations) match capacity and interests of the volunteers with the expressed needs of the organizations?
2. What can we (CESBCY) learn from the literature on effective strategic planning and implementation that could apply to the mid-term update to the CESBCY Strategic and Marketing Plan?

²⁸ The project proposal suggested that the website review may be an opportunity to identify barriers Chapter faced and how were these overcome. In practice, the downloaded documents from the website were the source for information on this evaluation question. As such it has been collected and presented alongside the document review.

²⁹ The original research questions and the rationale for the update of these questions is included in the 'research process' portion of this literature review.

The findings from this review are provided below; a summary discussion of these findings then follows. A description of the research process is provided at the end of the literature review for interested readers.

The CESBCY is a volunteer run, nonprofit, professional association. When researching how this and similar organizations can match their volunteers' capacity with their association's needs, a number of questions became apparent. How do we define these organizations? How do similar organizations compare with their larger nonprofit counterparts (i.e. those professionally managed)? Are there characteristics of volunteers that should be considered? For long term volunteers who commit to act as a member of the volunteer chapter executive, how might they be most effective? What challenges do similar organizations face?

As we consider the effective strategic planning of volunteer run, nonprofit, professional association (the targets of our research efforts), further questions arise. What are the typical processes - steps - for drafting and renewing a strategic plan? Under what conditions should an organization seek to update their strategic plan? Is there a checklist for a 'good' strategic plan? Are there special management and strategic planning considerations related to these organizations?

The following findings are broken out into sections to answer these questions.

Definitions

Stating that the CESBCY is a 'volunteer run, nonprofit, professional associations' is quite a mouthful. Before I describe what the literature has to say about similar organizations, the people involved, and their strategic planning and management needs, I will begin with some definitions. As I reviewed the literature, I found definitions for a number of related terms:

- Volunteering is defined by Verduzco (2010) as "unpaid help given to another person not a member of one's family" as cited in as (Wilson, 2012, p. 177).
- Kreutzer and Jäger (2011) cite Pearce (1993) when they describe volunteers, as those who "have no contractual obligation to the association" and go on to note that "the most obvious formal characteristic of volunteers is the absence of pay. Thus, volunteers have no monetary (or legal) reason for joining or staying with the organization" (p. 637).
- The process of volunteering is defined Gaskin & Smith (1997) "as time that is given freely and without pay to any organization that has the aim of benefiting people in a particular cause (as cited by Kreutzer & Jäger, 2011, p. 637).
- Wilson (2012) turns to Snyder and Omoto (2008) to define volunteer work. It is "freely chosen and deliberate helping activities that extend over time, is engaged in without expectation of reward or other compensation and often through formal organizations, and that are performed on behalf of

causes or individuals who desire assistance” (pp. 3-5). This definition, Wilson concurs is imprecise. Following from Cnaan, Handy, and Wadsworth (1996), Wilson sees defining a specific act as volunteering as a matter of degree (2012, p. 177).

- Handy & Brudney (2007) differentiate among three forms of volunteering when providing recruiting advice to nonprofit organizations (NPOs):
 - Service learning or mandated volunteering: “To achieve these positive externalities, [nonprofit organizations, NPOs] engaged in service learning should strive to give students a rewarding experience, even if the productivity of their volunteering is low. Furthermore, government might have a role to play in promoting and subsidizing volunteer activities with positive externalities” (Handy & Brudney, 2007, p. 10).
 - Short-term or episodic volunteering: “Volunteer tasks should be well-defined and tailored for limited participation. NPOs that relied more on episodic volunteers focused on recognition activities for their volunteers and less on training, supervision et cetera” (Handy & Brudney, 2007, p. 12).
 - Long-term or traditional volunteering: “From this perspective, standard elements of volunteer management are appropriate, such as recruitment, interviewing, screening, matching, placement, job description, orientation, supervision, training, performance review, maintenance of records, recognition, and fair and professional treatment” (Handy & Brudney, 2007, p. 14).
- Voluntary associations “represent a substantial part of the third sector” (Smith D. H., 1997, as cited in Kreutzer & Jäger, 2011, p. 640).
- Voluntary associations are defined by Anheier (2005) as “private, membership-based organizations in which membership is noncompulsory” (as cited in Kreutzer, 2009, p. 118).
- Harris (1998) collected prior definitions and characteristics of volunteer associations. She quotes Streeck & Schmitter’s (1991) characterization of these associations as groups with a “common purpose of defending and promoting functionally defined interests” and Lohmann’s (1992) notation that “in terms of participation [associations have] shared objects and resources, mutuality, and fairness.” Harris goes on to describe the characteristics of associations, stating that they “generally have a name, a governing body of some kind, articulated goals or purposes, and people who are members”(p. 145). She references the works of Billis (1993) and Knoté (1993) to say volunteer associations “may or may not have paid staff, but if they do, the staff members will usually be expected to act as assistants and facilitators for volunteer members” (p. 145). Citing Smith (1994), Harris then notes that “associations do not depend on paid staff for the principal accomplishment of organization tasks but are essentially run

by volunteers.”

- The professional association “is an organization of practitioners who judge one another as professionally competent and who have banded together to perform social functions which they cannot perform in their separate capacity as individuals” (Merton, 1958).
- Governance structures Kieser and Kubicek (1992) state “consist of the formal rules of coordination and participation within an organization” (as cited in von Schnurbein, 2009, p. 98).
- Kieser & Kubicek (1992) then define nonprofit governance “as a set of instruments and mechanisms that support the board of directors in its global leadership and ensure completion of the organization’s purpose, legitimacy, and accountability. In particular, nonprofit governance establishes operational guidelines for the interaction between the board of directors and the internal and external stakeholders” (p. 100).
- Renz (2005) defines nonprofit governance as “the set of processes, customs, policies, and laws affecting the way in which a nonprofit organization is directed, administered, or controlled. It also includes the relationships among the many stakeholders involved, entailing the functions of setting direction, making policy and strategic decisions, overseeing and monitoring organizational performance, and ensuring overall accountability” (as cited in Kreutzer, 2009, p. 117).

Organizational identity³⁰ is defined by Kreutzer and Jäger as, “those attributes that members feel are fundamental (central) and uniquely descriptive (distinctive) and that persist in the organization over time (enduring)” (2011, p. 639). They then cite a collection of authors with a different definition, namely, that organizational identity is as an idea that “resides in collectively shared beliefs and understanding about central and (only) relatively permanent features of the organization... that must be periodically renegotiated among members and are not enduring” (Corley & Gioia, 2004, Dutton & Dukerich, 1991, Gioia & Thomas, 1996, Gioia & Corley, 2000 as cited in Kreutzer & Jäger, 2011, p. 639).

These definitions overlap and are somewhat interrelated. There is general agreement that volunteering is the act of freely giving ones time to others or to a cause, without payment and in the hopes of making a positive change. (It logically follows that ‘mandated volunteering’ is not actually volunteering, but rather a socially acceptable form of unpaid labour, the characteristics of this were outside the scope of this literature review). Volunteering can then be understood to be either short and episodic, or the more traditional long-term commitment.

³⁰ In the literature reviewed for this project, authors used the terms ‘organizational identity’ and ‘organizational culture’ interchangeably. While I use the term ‘organizational identity’ in this paper, the reader is reminded that some authors may have used the other term in their original works.

A volunteer association, such as the CESBCY, is then a group of people volunteering their time to work collectively to achieve a shared goal. There may be paid staff, but these individuals support the volunteers and report to them rather than manage or govern volunteers.

Collecting together the identified definitions of nonprofit governance, I describe governance of a nonprofit organization as the process and tools used to manage the coordination and participation of stakeholders, including leadership, to achieve desired goals. This may come through formal rules and informal practices.

Interestingly, the definition of organizational identity found is somewhat contradictory. It is essentially the attributes ascribed to an organization by its members and stakeholders. Whether these attributes are consistent over time and across individuals or must be periodically renegotiated remains up for debate. By comparison, the definition of professional association dates back more than fifty years and is unchallenged in the literature found.

A volunteer run, nonprofit, professional association is then a collection of professionals with a shared understanding of the organization who have joined together for varying degrees of time to achieve goals and outcomes beyond the capacity of a single individual. It is governed by volunteer-members who use formal rules and informal practices to support the participation of its stakeholders. Any paid staff are managed by these individuals and play a supporting role.

Small volunteer associations versus large nonprofit organizations

Before continuing discussing the findings of the literature review, it is appropriate to distinguish between the small, volunteer associations that is the focus of our interest in the *Review and update of the CESBCY Strategic and Marketing Plan* and larger, nonprofit organizations.

A larger, nonprofit organization is significantly more formalized and structured than typical small, volunteer associations and is governed differently. Internally, an NPO may have Trustees and/or a Boards of Directors who work with or oversee a Chief Executive Officer (CEO) who will then manage paid staff who then go on to manage volunteers in support of external, non-member beneficiaries while being mindful of an array of external stakeholders. This is the model Miller-Millesen (2003) discusses as do Stone and Ostrower (2007), Herman and Renz (2000), Buchanan (2005), and many of the other authors found. Much of the literature identified in this review focuses on the large, nonprofit organization.

Kreutzer, citing Badelt (2002), states "nonprofits in which members are at the same time the primary beneficiaries distinguish themselves from organizations that provide services mainly for nonmembers" (2009, p. 118). This is supported by von Schnurbein's statement that "the governance structure of associations corresponds neither to that of for-profits nor to that of service-based nonprofits" (2009, p. 100). "Findings from studies of more formalized nonprofits that employ substantial numbers of paid staff,"

Harris contends, "cannot be assumed to apply necessarily or equally to voluntary associations" (1998, p. 154).

The differences between the two kinds of organizations are substantial. There are substantially fewer layers in a volunteer association than in the large nonprofit. The volunteer members are working for their own interests, as well as those of others. Paid staff may or may not exist in the small, volunteer association. If they do they are managed by volunteers, whereas in a large, highly structured nonprofit, the paid staff manage the volunteers. These differences mean that any review of nonprofit literature must select carefully the characteristics that are relevant to our area of interest.

Some details are applicable. For example, the role of board of directors in large nonprofit is not exactly translatable to the management of a small, volunteer association, but it is in part. In each instance, the leadership needs to both respond to member needs and to present the interests of the organization to non-members and any other external stakeholders, as Kreutzer's 2009 article describes.

Like their larger nonprofit counterparts "many associations, although they are membership-based, are not exclusively or even primarily membership-benefit in their purpose or activities. Many are intentionally or unintentionally what has been described as "Mixed benefactors [which] engage in both intrinsic and extrinsic benefactions" (Lohmann, 1992, p. 57 as cited in Harris, 1998, p. 148). To some degree at least, they provide benefits to both their members and the wider public (O'Neill, 1994 as cited in Harris, 1998, p. 148). This reflects the fact that voluntary associations are often an integral part of "their local organizational ecology; they have to respond to the fact that they are involved in a network of Interorganizational dependencies" (Milofsky, 1998 as cited in Harris, 1998, p. 148).

The following research is thus focused primarily on literature relating to volunteer run, nonprofit, professional associations (our target). Given the relative dearth of literature on these groups, this review has been supplemented by other sources that share some characteristics with our target and where the detail or concept is transferable.

Applicable theories

As we consider the question of how our volunteer run, nonprofit, professional association manages itself (i.e. matches capacity and interests of its volunteers with the expressed needs of the organization) it is useful to know whether there is a particular management theory that can be applied to our target organization.

In 2009, Kreutzer referenced Cornforth (2003) and four other theorists to list six main theoretical perspectives, designed to understand *for-profit* organizations, adapted by researchers for use in understanding *nonprofits*. Remembering the earlier passage on small volunteer associations versus large nonprofit organizations, we must consider whether any of the following six theories could apply to our target organization.

1. "Agency theory assumes that the owners of an enterprise (the principals) and its managers (the agents) have different interests. Consequently, according to agency theory, the primary function of the board is to ensure managerial compliance" (originally described by Fama & Jensen, 1983). This theory seems unlikely to apply, as a professional association isn't really owned and our volunteer-members would themselves be both the principals and the agents.
2. "Stewardship theory starts from the assumption that managers want to do a good job; thus, the main function of the board is to improve organizational performance while acting as a partner to the management" (Donaldson, 1990). While our volunteer-members undoubtedly also wish to do a good job, we again face the scenario of essentially a single actor playing two roles.
3. "Resource dependence theory is based on the premise that organizations depend crucially on other organizations and actors for resources for their survival (Pfeffer & Salancik, 1978). Thus, the board has a boundary-spanning role in which it must maintain good relations with key external stakeholders in order to ensure the flow of resources into and from the organization." The members of a professional association are self funding and self managing, so there is limited applicability here as well.
4. "The democratic perspective on governance suggests that the task of the board is to represent the interests of one or more of the constituencies the organization serves" (Cornforth, 2003). This theory may provide some insight if we assume that not all members of the professional association have entirely shared interests.
5. "Stakeholder theory assumes that organizations should be responsible to many groups in society rather than solely to the organization's 'owners' (Freeman, 1984). This need to negotiate and resolve the potentially conflicting interests of different stakeholder groups results in a political role for boards (Cornforth, 2003)". The applicability of this theory depends on the degree to which the organization is outward focused and has other stakeholders. Returning to Milofsky's idea that voluntary associations operate in an ecology of organizations, this theory may be useful to support an understanding of how the association positions itself in that ecology.
6. "Managerial hegemony theory (Mace, 1971) claims that due to the largely voluntary nature of board members' involvement and the subsequent constraints on their time, board members powers are limited and control is ceded to the managing director and his or her staff. The role of the board is consequently largely symbolic (rubber-stamp model) (Cornforth, 2003)". This reflects on entirely different organizational structure to the one we are interested in and is not applicable.

None of these theories is an ideal match. This is unsurprising, as von Schnurbein (2009) notes, "governance theories or models that target associations are rare" (Tschirhart, 2006 as cited on p. 98). Further exploration of the literature brought additional theories to light.

In 2011, Kreutzer partnered with Jäger to identify two other means of considering volunteer associations: managerialism and volunteerism. Citing Maier & Meyer (2009), they note that "managerialism is generally understood as the 'dominance of management practices and ideas'", specifically "a form of organizational structure that incorporates effectiveness, efficiency, agency, and progress as central norms." Kreutzer & Jäger (2011) contrast this with volunteerism where volunteers have no contractual obligations to the organizations, but instead prefer basic democratic structures and practices which support integration

rather than efficiency (p. 636). This is not dissimilar from Howlett and Rochester's (2007) suggestion that a "volunteer way of doing things' might be characterized by basic democratic structures and non-managerial logics in which integration is more important than efficiency" (as cited in Kreutzer & Jäger, 2011, p. 636).

The separation of managerialism and volunteerism is interesting, but may be a false dichotomy within a professional association, at least at an organizational level. One can reasonably expect that members and volunteers would anticipate their own professional standards will be replicated by the professional association. At the same time, the need for consensus and the pace of volunteer efforts can't but be characteristics of a fully volunteer run organization. Undoubtedly, tensions between the two practices would exist, but likely not as a structure of the association so much as within the individual members themselves.

That same year Kreutzer and Jacobs (2011) reviewed a collection of theories that "purport to explain governance in nonprofit organizations." Here stewardship theory (as described by Alexander and Weiner (1998) and Jeavons (1994)) and agency theory (as offered by Harris (1989), Jegers (2009); Miller (2002); Olson (2000)) are again included. Three additional theories are also identified:

- combination of agency, resource dependency, and institutional theory (Miller-Millesen J. L., 2003)
- board-management relations in civil society organizations posited by Ostrower and Stone (2006)
- contingency theory as described by Bradshaw (2009); Ostrower and Stone (2010)

Upon review of each of these theories, Kreutzer and Jacobs conclude that none are able to comprehensively describe governance with nonprofit organizations (2011, p. 615). This is not surprising, as Kreutzer (2009) had previously held that "there are no truly universally applicable models for nonprofit governance, as had been posited by Holland, Leslie and Holzhalb, (1993), Brudney and Murray (1998), and Friedman and Phillips (2004)" (p. 140).

Of the theories identified, two have the potential to provide insight to our volunteer run, nonprofit, professional association. If we assume that the contexts and specific interests of professional association members vary, that the professional association operates in an ecology of organizations, that it is outward facing (i.e. attempting to better more than their own lives) with an impact outside the membership then both the democratic perspective on governance and the stakeholder theory can be of use. In this highbred theory our member-volunteers would need to both represent the diversity of interests of the of the professional association members to each other and would need to negotiate and resolve the potentially conflicting interests of different external stakeholder groups. A volunteer professional association could reasonably be expected to experience tensions between the professional standards they employ in their own working life and the basic democratic structures of a peer managed organization (i.e. the time needed for consensus-based decisions and the pace of effort in a volunteer run association).

Given the dearth of research on this kind of organization, this is potentially an incomplete assessment of the governance within a volunteer run, nonprofit, professional association, but not wholly inaccurate.

Characteristics of volunteers

Knowing something about what kinds of people volunteer and why, a volunteer association may be better able to support their volunteer efforts. Wilson (2012) reviewed the literature to determine which personality traits best aligned with volunteering. He found “the trait most often associated with doing volunteer work is extraversion, followed by agreeableness” then solidarity, and the need to express one’s identity (Bekkers, 2005 and Omoto et al, 2010 as cited in Wilson, 2012, pp. 179-180).

Wilson went on to cite Gronlund’s (2011) research, which resulted in a list of five different volunteer identities: “(i) influencer – fighting injustice and wanting to make the world a better place, an activist, a nonconformist, serious, values driven; (ii) helper – benevolent, compassionate, bringing comfort, understanding; (iii) faith-based – bearing witness, a calling, expressing religiosity; (iv) community – value of communality, loyalty, solidarity, generativity; (v) success – occupying positions of trust, leadership, being a good citizen, paying back, taking responsibility, using talents” (Wilson, 2012, p. 180). As a professional association, our target organization is unlikely to include the third type of volunteer, but could easily have any or all of the remaining four.

When volunteering, Kreutzer & Jäger (2011) found people must feel needed. Being needed led to a sense of satisfaction in the effort. Wisner, Stringfellow, Youngdahl, and Parker (2005) identified other factors that led to volunteer satisfaction including social interaction where “pairing or teaming of volunteers, even if the work could be done well individually, provided significant social benefits that increase volunteer satisfaction” (p. 148). They also found that orientation and training “provides skills and knowledge required to have the service capabilities necessary to support the mission of the organization” (p. 147). Empowering volunteers to “offer recommendations, use their skills, exercise initiative and make decisions about how to do their jobs” (pp. 147-148) led to volunteer satisfaction. Kreutzer & Jäger (2011) similarly found that volunteers need “sufficient leeway to develop and implement their ideas” (p. 646). Wisner et al found three further characteristics that supported volunteer satisfaction; schedule flexibility, opportunities for reflection, and rewards and recognition of their efforts (pp. 147-148).

Not all volunteers are satisfied. As Kreutzer & Jäger (2011) found if the need (i.e. workload) on a volunteer is too great then the need becomes a burden. On a related note McClintock found that “a significant number [of volunteers] are unwilling to make a long-term commitment, [preferring] short-term, one-time, and even drop-in volunteer opportunities” (2004, p. 9).

Of the volunteers able to commit to a nonprofit, Kreutzer (2009) quotes Pearce (1993) who found that “most volunteer organizations depend on a core group of board members who fulfill the most important functions.” Kreutzer goes on to warn volunteer organizations that “recruiting external people with

expertise that has not been present in the organization before may provoke serious internal conflicts with these core members as they regard themselves as the owners of the organization" (2009, p. 125).

Volunteers, particularly those in a volunteer-run association, "expect their wishes and needs to be met by the association. If they do not receive the material, social, or psychological benefits they expect or if they are discomforted in some way by their association participation, they are likely to pursue the exit option" (Oropesa, 1995 as cited by Harris, 1998). Harris goes on to note, rightly, that these members "participate, after all, on a voluntary basis" (p. 147). Given this reality, Wisner et al recommend that nonprofits "need to accommodate volunteers and the idiosyncrasies of volunteers' motivations, skill levels, and availability" as much as possible (p. 144).

Effective Boards of Directors

Having discussed the characteristics of volunteers in general, and those volunteer members in associations, it is now useful to look at Boards of Directors (BoDs). These are traditionally a part of larger, nonprofit organizations and take the lead in policy-making roles as well as having ultimate responsibility for the governance of the organization. This is one of those instances however, when aspects of NPO research can be sampled for the benefit of smaller, volunteer associations. Not every member of a volunteer association need volunteer their time to its management and operations. Some may volunteer for a time and step back to make room for others. Some may simply pay their membership dues and not volunteer any time to the association. Some may provide ad hoc advice and support or may participate only in episodic volunteering as noted by Handy & Brudney (2007). For those who do choose to volunteer for longer terms, they may find themselves representing the diversity of interests of the association members and negotiating and resolving the potentially conflicting interests of different external stakeholder groups. In other words, very much behaving like a member of a Board of Directors.

Kreutzer (referencing Herman (1999)) was speaking of larger NPOs when he wrote "without an excellent board of directors, a nonprofit is unlikely to attain its full potential (2009, p. 124). It is at least as important to have a well functioning collection of long term member volunteers in a volunteer run, nonprofit association.

Herman and Renz have done excellent work in identifying the characteristics of effective boards (our proxy for a moment for our long term volunteer manager / operators). They found that "the prescriptive literature suggests that boards using a greater number of recommended board practices will be more effective" (Herman & Renz, 2000, p. 156).

While describing a different nonprofit context, Herman and Renz (2000) identified the characteristics that differentiate effective Boards of Directors and their less effective counterparts. Chief among these are the use of Board self-examination and written expectations of roles for Board members. (Herman & Renz, 2000, p. 156).

Herman and Renz (2000) identified a series of Board practices for 64 not profit Boards of Directors. They then went on to compare the ten most effective and ten least effective Boards, as determined by stakeholder feedback and other independent variables. Seven practices were consistent across the ten most effective Boards, a further three practices were consistent across nine of the ten most effective Boards of Directors. Of the top ten characteristics, seven can be applied to small, volunteer-run, professional associations, these were;

8. The use of a board manual
9. All board members have office or committee responsibilities
10. Written policy specifying roles and powers of Executive Committee (in our case, this is a collection of volunteer-members who've committed to longer term positions)
11. Board uses consensus decision-making process
12. Orientation for new members
13. Written policy about attendance at board and committee meetings
14. Written policy on dismissal for absenteeism (pp. 153, excerpts from Table 2)

While a small volunteer association is not an exact comparator, it is worth noting that in the larger NPOs "many boards do not fully meet their governance and management responsibilities" (Herman & Renz, 2000, p. 158). This is a malleable state. "Intentional efforts to improve board performance can result in such improvements and that boards that perform their duties more fully help their organizations to be more effective," (Herman & Renz, 1999).

While being cautious of Abzug's (1996) thought that there "are no universally applicable guidelines for recruitment and selection of board members as there is no one best way to structure and compose a board of directors" (as cited in Kreutzer, 2009, p. 124), it is reasonable to conclude that providing volunteer members with the seven identified characteristics, and emphasizing self-examination and written expectations of roles for members would benefit a volunteer run, nonprofit, professional association.

Effective strategic planning

Strategic planning within a professional association is, as Parent (1988) tells us, "a powerful management tool that can be used to provide more effective association leadership, to select strategies from among appropriate association functions, and to develop unique plans that fit the needs of the association and the profession. Strategic planning is a responsibility of members, leaders and staff," (p. 348). This is an inspiring thought, but let us stop for a moment to be sure we have a consistent understanding of what strategic planning really is and why it is useful.

Parent's work on strategic planning in professional associations is refreshingly close to our desired review focus. He is in the minority of authors, as once again we sample from the literature on larger NPOs to find insights and ideas applicable to our smaller volunteer association.

John Bryson has done a lot of work in strategic planning as it relates to nonprofit organizations. He defines strategic planning as “a disciplined effort to produce fundamental decisions and actions that share and guide what an organization (or other entity) is, what it does, and why it does it” (Bryson J. M., 2004, p. 6).

Earlier, in 1988, Bryson identified why nonprofit organizations needed to consider a disciplined approach to planning. “First, these organizations need to exercise as much discretion as they can in the areas under their control to ensure responsiveness to their stakeholders. Second, these organizations need to develop good strategies to deal with their changed circumstances. And third, they need to develop a coherent and defensible basis for decision making” (p. 74). He went on to posit that “Without strategic planning it is unlikely that these organizations will be able to meet successfully the numerous challenges that face them” (p. 74). These ideas apply equally to our target group. Later, he identified a series of benefits of strategic planning, namely:

- “think strategically
- clarify future direction
- make today’s decisions in light of their future consequences
- develop a coherent and defensible basis for decision making
- exercise maximum discretion in the areas under organizational control
- solve major organizational problems
- improve performance
- deal effectively with rapidly changing circumstances
- build teamwork and expertise”(Bryson J. M., 1988, p. 78)

We may ask, what is *strategic* about this planning? For that, we return to the work of Parent (1988) who clarified this when discussing volunteer associations. “The purpose of strategic planning is to identify clearly the most desirable end results, and to give clear direction to the work of the associations’ members, leaders and staff. Clearly articulated desirable end results, mission and goals, should dictate which strategies and actions are pursued, how they are pursued, and when they are pursued. Making such choices is difficult, but essential and it requires commitment to effective planning, decision-making, prioritizing and evaluating” (pp. 343-344). The strategy comes in when a volunteer association must prioritise its goals and objectives in the face of limited, and potentially changing, resources.

Adapting ideas from Parent (1988), an effective strategic plan is one that promotes discussion and builds consensus on major priorities and goals. The role of a strategic plan in a professional association he contends is “to achieve a workable level of unity and understanding among members who are widely dispersed. These documents encourage members to explore a variety of strategies for addressing goals. They help members to select effective strategies. Planning documents provide a basis for clearer communication about conditions and needs within the profession and society” (Parent, 1988, p. 346).

Steps for drafting and renewing a strategic plan

It is, as Parent (1988) notes, “the governing body’s responsibility to formulate goals, priorities, policies and plans for the total organization; and to link resources to these priorities and plans with the annual budget.” A number of author’s have documented the steps they believe to be most useful in developing a strategic plan. These are listed individually below followed by a brief discussion of their characteristics and similarities.

Ayal’s (1986) article was one of the earliest I found that discusses the steps involved for creating a strategic plan for professional associations. Using a case study, Ayal describes the actual steps used in developing such a plan.

1. A diverse steering committee was established and professional consultants were hired with expertise in strategic planning.
2. Recommendations were developed based on the following steps.
 - Develop multiple, preliminary mission statements.
 - Conduct a large scale member needs assessment, to enhance understanding of problems, issues and terminology, prior to preparation of questionnaires for the quantitative phase of the research.
 - A survey of the membership to define the constituency of the strategic plan and begin to set priorities.
 - A survey of the leadership, to incorporate similar information to that of the prior survey, but from an audience with more time spent operating and managing the organization.
3. An environmental analysis was completed.
4. A final mission statement was developed based on the prior drafts and in large part on the survey results.
5. General and specific objectives were developed linking to the mission of the association. General objectives were built on foundation mission and are directional to fulfill purpose. Specific objectives were detailed statements of what should be achieved and were clearly linked to general objectives.
6. Policy setting groups were established to implement recommendations and documented plans.

Parent (1988) describes a process for professional associations with fewer distinct steps, noting that at the time of his paper, “most readers of this paper are familiar with the basics of

“The process is quite straightforward and includes four basic steps that require:

1. Identifying and analyzing internal and external factors that are influencing the association and the profession.
2. Developing a clear statement of the association’s mission and setting goals and realistic, measureable objectives.

strategic planning" (p. 344).

3. Creating and implementing strategies and actions that will assist the association in achieving its mission and goals.
4. And measuring and evaluating the degree to which strategies and actions are assisting the association fulfill its mission and reach its goals" (Parent, 1988, p. 344).

Bryson (1988) initially developed eight steps for strategic planning in the public sector and nonprofit organizations. At the time, he noted that "in most organizations key decision makers and managers from different levels and functions almost *never* [authors emphasis] get together to talk about what is truly important (p. 74).

1. Development of an initial agreement concerning the strategic planning effort.
2. Identification and clarification of mandates.
3. Development and clarification of mission and values.
4. External environmental assessment.
5. Internal environmental assessment.
6. Strategic issue identification.
7. Strategy development.
8. Description of the organization in the future(pp. 74-77).

Bryson includes a visual representation of this model in his article.

Figure 22 Bryson's 8 step strategic planning process.



Model based on materials of the Management Support Services Unit, Amherst H. Wilder Foundation, St Paul, MN; the Institute for Cultural Minneapolis, MN; and the Office of Planning and Development, Hennepin County, MN.

Baker's (1989) process for developing a strategic planning was somewhat

1. Environmental Scan
2. Develop the Values, Vision, Mission of the organization through consensus

shorter and relied on comparing one's own organization to peers for inspiration and strategies.

3. Conduct comparisons of similar 'peer' institutions to identify other institution directions
4. Review and completion

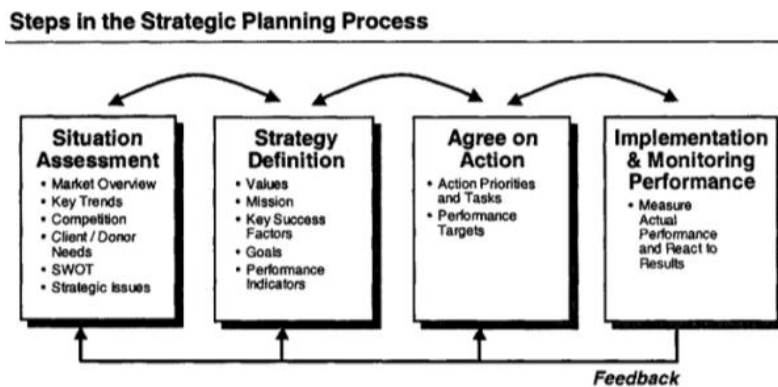
In 2001, Rogers, Finley, and Galloway identified two key aspects in strategy planning, namely: "the process involved in establishing and maintaining an environment that engages stakeholders in meaningful ways and promotes consensus building; and the sequential steps leading to a strategic plan" (p. 21). Meaningful engagement of stakeholders, providing those impacted and influenced by the organization with an opportunity to have their ideas incorporated into its plans and actions is an ongoing concern for Roger et al.

The four step process they designed included four basic steps.

1. "situation assessment
2. strategy definition
3. agree on action, and
4. implementation and monitoring performance" (p. 24).

They further defined these steps and included the additional details in graphical representation of the process.

Figure 23 Rogers et al's steps in the planning process



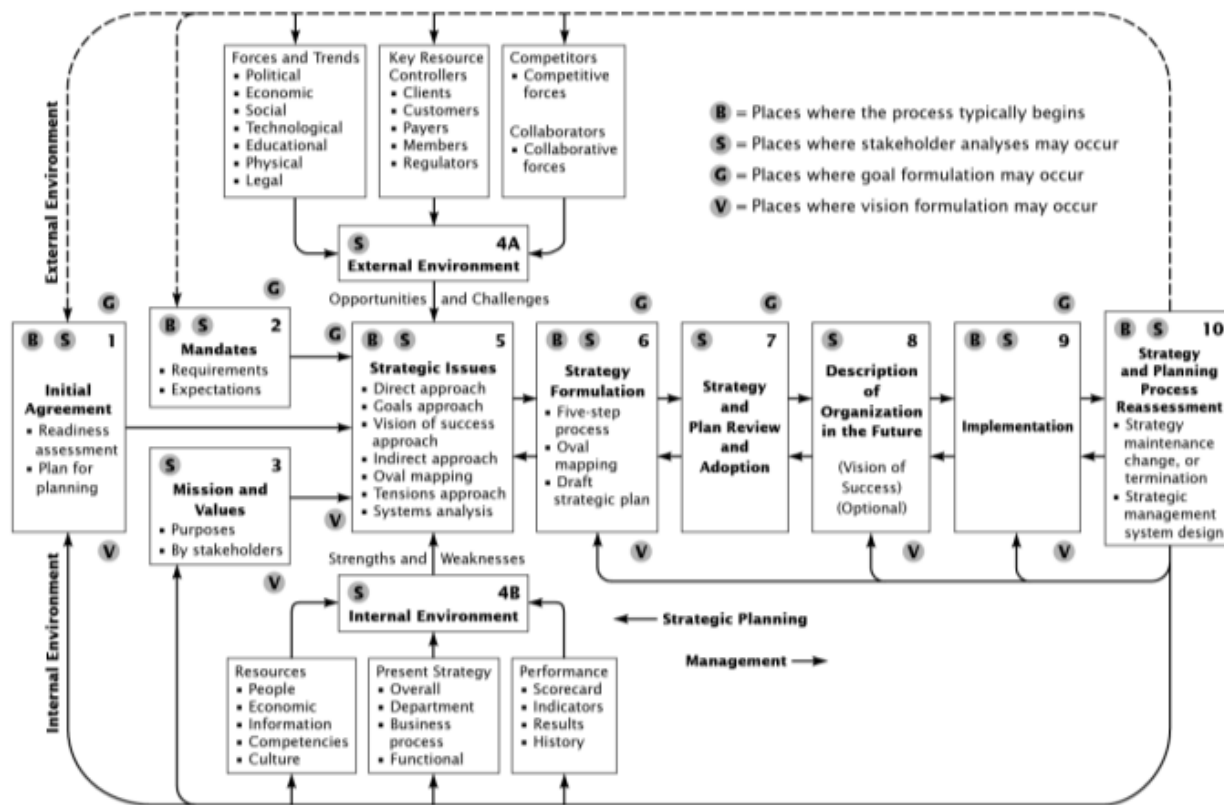
(Rogers, et al. p.25)

In Bryson's later work (2004) he expanded his eight steps to ten and emphasizes that each step is "an occasion for dialogue and decision" pp.33-34.

1. "Initiate and agree on a strategic planning process.
2. Identify organizational mandates.
3. Clarify organizational mission and values.
4. Assess the external and internal environments to identify strengths, weaknesses, opportunities and threats.
5. Identify the strategic issues facing the organization.
6. Formulate strategies to manage the issues.
7. Review and adopt the strategies or strategic plan.
8. Establish an effective organizational vision.
9. Develop an effective implantation process.
10. Reassess the strategies and the strategic planning process" (pp. 33-34).

Working with Alston, Bryson (2004) developed a process map to guide nonprofits through their strategic planning process.

Figure 24 Bryson and Alston's Strategy Change Cycle



(Bryson, and Alston, 2004. p16)

Each of these authors' recommended processes include some consistent stages. Each includes the development of a clear mission. Some authors added in the development of a vision statement as well. They all seek to determine the internal and external influences on the success of the organization (e.g. a strengths-weaknesses-opportunities-threats/challenges analysis (SWOT/SWOC), a needs assessment, an environmental assessment, etc.). A number of author's include some form of evaluation or reassessment of the plan and/or its process as the final step in the development of the strategic plan.

Rogers et al's (2001) description of the planning process as "the ongoing responsibility of management, not a one-time project to be completed" supports this practice. It is, they note, "an iterative activity focused on discussion and consensus building, resulting in well-defined action. The strategic planning process is never actually finished" (2001, pp. 21, 29). Interestingly, Bryson's early work did not include an evaluation/reassessment process and integrated a number of ideas into the phrase 'strategy development'.

Bryson and Alston's (2004) work is more detailed; as an instructional guide significant detail is to be expected. It unpacks somewhat what is meant by 'strategy development' and includes an opportunity for

evaluation of the plan and process used to develop the plan. It is this model that provides the greatest clarity of on how to plan strategically, providing details on when a stakeholder analysis may occur, on when it is appropriate to (re)formulate goals, and where it is appropriate to (re)develop a vision for the organization, and on stages in the described process where an association may start or update its planning process.

Elements of a 'Good' Strategic Plan

What is then a 'good' strategic plan? It is not simply following the steps. Baker (1989) adds an important criterion for our assessment of strategic plans. "A good strategic plan" he tells us, "will provide a clear vision for the association, directions and strategies to achieve that vision, and will provide the association the tools it needs to deal with and *face changes in critical times* [emphasis added]" (pp. 203-206). This utility of the document during the difficult times is what separates a good plan from merely pages on a shelf. In this discussion, we again turn to the literature on large NPOs to find ideas that useful for our volunteer professional association.

Bryson (2004) turns to Poister and Streib (1999, pp. 309-310) to describe some of the characteristics of a 'good' strategic plan. Poister and Streib "assert strategic planning should

- be concerned with identifying and responding to the most fundamental issues facing an organization
- address the subjective question or purpose and the often competing values that influence mission and strategies
- emphasize the importance of external trends and forces as they are likely to affect the organization and its mission
- attempt to be politically realistic by taking into account the concerns and preferences of internal, and especially external, stakeholders
- rely heavily on the active involvement of senior management, and [in the case of public planning] sometimes elected officials, assisted by staff support where needed
- require the candid confrontation of critical issues by key participants in order to build commitment to plans
- be action oriented and stress the importance of developing plans for implementing strategies, and
- focus on implementing decisions now in order to position the organization favourably for the future" (as cited in Bryson J. M., 2004, pp. 30-31).

Smith (n.d.) adds that performance measures with benchmarks and performance targets, and a requirement to report progress made toward goals are characteristics of more comprehensive strategic plans (p.6). A good strategic plan for her is one that will "take a holistic view of government functions and effect alignment between missions, goals, and strategies" (Smith, n.d. p. 6).

As Abraham (2004) considers strategic planning, (s)he takes a slightly different approach and questions the viability and usability of a strategic plan based on financial considerations for the nonprofit

association. While we consider the relationships and time of our volunteer members, it is important not to forget these financial considerations. A good strategic plan will answer these questions:

1. Are there sufficient and flexible financial resources sufficient to support this mission?
2. What financial resources are available to support the mission? Is long term financing needed and available?
3. How are financial resources used to support the mission?
4. Are financial resources applied efficiently and effectively to support the mission?" (Abraham, 2004, pp. 6-18)

Outside of the plan itself good strategic planners consult with stakeholders. Smith (n.d.) emphasizes this in her work, as does Ayal (1986). Bryson (2004) reflects a number of authors who rightly emphasize that understanding ones stakeholders is necessary for any organization to understand plan and assess its own successes. "If an organization does not know who its stakeholders are, what criteria they use to judge the organization, and how the organization is performing against those criteria, there is little likelihood that the organization (or community) will know what it should do to satisfy those stakeholders" (Boschken, 1994, 2002; Rainey and Steinbauer, 1999; Rainey, 2003, as cited in Bryson, 2004, p. 107).

"Strategic planning is iterative, flexible, and action-oriented" Bryson (2004) contends (p.52). Rogers et al (2001) provide some better practices when they state that "by continuously asking questions and assessing the answers, an organization is able to pinpoint where incremental improvements can be made in its services and the processes and systems related to the delivery of those services. Organizations that routinely go through self-evaluations of this nature will discover that they can identify and readily eliminate unneeded activities," (p. 45).

Updating a strategic plan

The discussion thus far has included the full strategic planning cycle in a somewhat ideal state, where an organization starts the process and proceeds without incident to the final stage, so that the process can be repeated in an ongoing and iterative fashion. As important as it is to see strategic planning as iterative and ongoing, an organization cannot spend all its time planning and evaluating. It must determine when best to interrupt its ongoing activities to undertake a planning process. When then to do so?

Baker (1989) suggests that an association may need to update its long-range plans if it is not making significant progress, or if it needs to re-think the assumptions that led to the original strategic plan. In his example, an association "spent considerable energy over three years, first creating the initial five-year plan, then updating that plan in succeeding years" (p. 200). The association reviewed and updated its strategic plan two years prior to its planned renewal because they felt "that we were not making significant progress" (Baker, 1989, p.200).

Bryson (2004) notes that in his experience, “the process does not always begin at the beginning” (p. 52). Strategic plans may be started or updated at various places in the planning cycle. In his model, more than half of the ten steps are potential starting points. Using Bryson’s 2004 steps, let us take a look at what may trigger a review and update of a strategic plan. For Bryson, the most common instances when organizations would start a strategic plan, other than step 1, are when organizations “find themselves confronted with a new mandate (step 2), a pressing strategic issue (step 5), a failing strategy (step 6 or 9), or the need to reassess what they have been doing (step 10), and that leads them to engage in strategic planning” (Bryson J. M., 2004, p. 52).

In Bryson’s second step *identify organizational mandates* (2004, p.99), a change in the organizations formal and informal mandate or a change in what is required as a result of the mandates would be a trigger for a review and update of an organizations strategic plan. In step five, *identify the strategic issues facing the organization* (2004, p153), a review and update would be triggered by a perceived change or need to redefine a strategic issue. (By strategic issue, he means a “fundamental policy question or critical challenge affecting an organizations mandates, mission and values, product or service level and mix, clients, users or payers, cost, financing, structure, processes or management” (p. 153)). In step six, *formulate strategies to manage the issues*, instances where the strategies designed are not linking the “organization (or community) to its environment” would be a trigger. Similarly, in step nine, *develop an effective implantation process*, poor or ineffectual implementation would trigger a review and update of a strategic plan. Bryson’s tenth step is itself a scheduled opportunity to *reassess the strategies and the strategic planning process*. In this step, “the organization should review the strategies and the strategic planning process, as a prelude to a new round of strategic planning” (2004, p. 51).

Strategic planning and management considerations in volunteer associations

It is difficult to determine whether planning and managing a volunteer run, nonprofit, professional associations would be easier or more difficult than doing so for any other organization. As noted above, there is a dearth of literature and research related to these kinds of professional associations. Fewer authors have researched the specific challenges, opportunities and solutions for these organizations. There are characteristics specific to volunteers, particularly to those who choose to commit long term to managing and operating the association to be considered. There are some ideas available to support those who undertake to plan for and manage such a group, there are also some risks and cautions to be considered.

Before we look at solutions, let us review the risks and cautions specific to volunteer associations. While the association benefits from uncoerced activity and work without pay in all aspects, Harris (1998) reminds us that “voluntarism underlies many of the organizational challenges that associations face.” Specifically, she reminds us that “members can vote with their feet if they are not *totally happy* [italics added] with their association” (pp. 154-155). Total happiness is a very high standard. Having volunteers leave, particularly long term volunteers who have memories of past rationale, actions, and inactions, can be a significant loss, more so in smaller organizations. Leaving is not the only risk inherent in volunteer

members' behaviour. Harris goes on to caution that if volunteers fail to complete a task they've committed to, or if they do a poor job, the implications for their associations' reputation and its overall functioning can be imperiled.

This ability of volunteers to simply walk away may have a greater impact on a volunteer association, particularly if it is relatively small. Referencing the work of Pearce (1982), Kreutzer and Jäger (2011) note that a volunteer association experiences a "unique type of pressure for an organization that depends on volunteer work because of the association's awareness that its members could abandon the organization at any time" (p. 637). "Volunteer loyalty" Wisner et al remind the reader "is critical to many not-for-profit service organizations since volunteers ensure the continued sustainability of the not-for-profit" (p. 137); maintaining that loyalty will be an ongoing concern for the volunteer association.

Volunteer members in associations are somewhat unique among other volunteers and other stakeholders. They "perform several roles at the same time, which puts them into an accentuated position compared to other stakeholders. Specifically, members are the legitimating body, contributors, volunteer members, clients of services, and beneficiaries of public goods provided by the association" (Schwarz, 2005 as cited in von Schnurbein, 2009, p. 97).

When we consider our long term volunteers, (those who've committed to governance and management of the association), there are two further risks to be considered. While following the earlier advice implied by Kreutzer & Jäger (2011) and giving volunteers leeway to develop and implement their ideas, there is the risk that some volunteers may become entrenched and treat their volunteer jobs as their own personal domain. Volunteer associations may find it difficult to unseat or control these volunteers.(Harris, 1998, p. 152) This is further complicated by the reality that "many associations face recruitment difficulties and are thus continuously understaffed" (Pearce, 1993 Kreutzer, 2009, p. 124). It is not difficult to imagine a small volunteer association being ineffective because a competent volunteer leaves and a less competent one refuses to do so.

Barr and Imagine Canada (2006) note that "...few organizations can afford the time or money to properly manage or train their volunteers. This means that many volunteers are doing tasks that are not well-suited to their skills, abilities, or interests. Both of these problems can cause volunteers to stop volunteering" (p. 4).

A further challenge for our small volunteer associations relates to the selection of volunteers. Knowing that long term positions may be understaffed, "selection criteria for volunteer board members in many organizations are very low or do not exist at all" (Pearce, 1993 Kreutzer, 2009, p. 124). Matching the needs of the association to the capacity of its volunteers is harder when there are few volunteers from which to choose. For truly small volunteer associations, the planning and management of the association may then need to start with the capacity and interests of the volunteers. This would not be unusual, as von Schnurbein (2009) quotes Schwarz (1996), "associations tend to formulate their strategy according to their governance structure rather than vice versa" (p.98). This is in direct contradiction to the recommendations

made by McClintock (2004) who suggests that “when thinking about volunteers, the wrong question to ask is, “What can volunteers do to help us?” The right question, she suggests, is “What needs to be done around here?”(p. 11). It would seem there is little consistency in the guidance for our volunteer associations.

If, as was posited earlier, a given volunteer association had members with varied contexts and interests, than the association must be sure to establish a consistent organizational identity. Regardless of how much capacity a given volunteer has to commit to the organization, they must have a shared understanding of what the organization is and where their efforts fit. They must take the time to confirm the volunteers share an understanding of what the organization is, what it does and how it does it. An inconsistent understanding of the mission of the organization is a significant risk to the volunteer association. Kreutzer & Jäger (2011) found that “conflicting beliefs among members about their organization’s identity can have significant negative impact.” Kreutzer & Jäger go on to cite Jehn, Northcraft, and Neale (1999), who “examined members’ perceived disagreement about what their group’s real mission or goal should be, found that it is the diversity associated with values . . . that causes the biggest problems . . . in work group performance and morale” (p. 758) Disagreement about organizational identity “is a struggle . . . over the very soul of the institution” (Albert & Whetten, 1985, p. 272)as found in Kreutzer & Jäger, p. 637. Divergent understanding could lead to conflicting efforts, or an undermining (purposely or not) of efforts on one volunteer by another. This could lead to conflicts between volunteers or loss of motivation. Conversely, a consistent organizational identity supports volunteers’ motivation and loyalty.

Parent identified a tension that exists between the short term motivation of individual volunteers and the longer term needs of the professional associations in question, “Instead actions are occasionally pursued because they respond to pressures from a relatively few vocal and outspoken groups. Sometimes actions are pursued because they are simple and can be accomplished easily within the constraints of a volunteer’s term of office, usually one or two years. These simple actions give a sense of immediate accomplishment” (1988, p. 343).

Given these challenges, the question arises of whether or not a small volunteer association should simply hire paid staff to maintain standards and support the productive volunteers. This is an option for our target, but one that should be undertaken carefully. As noted earlier, larger nonprofit organizations typically have staff who manage volunteers. This is not the case in volunteer associations. “As members, the volunteers owned the association. Thus, the volunteers felt that they were employing paid staff to help them [achieve the mission of the organization]. They expected staff members to act as their assistants and facilitators” (Kreutzer & Jäger, 2011, p. 647). Where a volunteer association has paid staff, the expectations of both volunteers and staff need be consistent and paid staff must share a consistent vision of the role of the organization. There is an additional consideration;” when payment is instituted for the work done within associations, it implicitly undervalues work that does not pay” (Harris, 1998, p. 153).

It is Harris again who identifies the risk of transitioning to paid staff, “[volunteer] members perceive a fundamental difference between ‘by some for us or for all for us’ and ‘by them for us’”(p. 153).

It can be a challenging state for our small volunteer associations. “Association leaders... [must] pay close attention to motivation and managing [volunteer] members to ensure that tasks essential to organizational survival are accomplished” (Bettencourt, Dillman, & Wolman, 1996 and Harris 1996, as cited in Harris, 1998). At the same time, and herein lies the challenge, association leaders “have at their disposal only weak instruments for convincing other members to follow their suggestions... members seem largely motivated to take on voluntary work within associations because of the opportunities it provides for autonomy, self-fulfillment, and expressive relationships (Mason 1995, as cited in Harris 1998)... [and] do not generally expect to be managed, controlled, monitored, or subjected to the norms or hierarchical bureaucratic structures (Rothschild-Whitt, 1979 as cited in Harris 1998, p. 151).

A solution offered by Harris is “the need to pay close attention to [volunteer] members’ motivations and sociability needs, to strive to reach consensus in decision making, and to *avoiding upsetting them in any way* [emphasis added] – even when this is at the expense of meeting longer term or broader goals or of enacting organizational change”(Harris, 1998, pp. 154-155). This is a pretty severe position, but not the only solution for our volunteer associations.

A good practice in soliciting and managing volunteers is to design “volunteer positions that meet the organization’s needs while ensuring that volunteers understand exactly what is required of them, both in terms of their assignments and the time involved, and that they have support to carry out those assignments” (McClintock, 2004, p. 11). McClintock goes on to enunciate a process to support this development of volunteer positions:

- “Review the mandate or mission of your organization.
- Review the various functions or tasks that must be carried out to achieve the mission or mandate.
- Establish the qualities that are needed to perform the various components or tasks.
- Identify and describe discrete volunteer assignments, i.e. Develop position descriptions.
- Match volunteers to positions or assignments”(p. 11)

Wisner, et al (2005) remind us that “volunteers who are satisfied are more likely to be loyal to the organization by contributing more time, contributing financially, and by recommending the organization to other potential volunteers. These contributory actions on the part of the volunteer help add to the sustainability of the not-for-profit organization by increasing the amount of volunteer hours and financial donations available to the not-for-profit” (p. 146). An association can “get the best effort from their volunteers when those volunteers have clearly defined roles, understand those roles, and feel a sense of confidence in their ability to fulfill their roles” (McClintock, 2004, p. 11).

Having clearly defined roles, that continue to be clarified as the organization grows, is one of three strategies that Buchanan (2005) identifies to improve the effectiveness of nonprofit organizations. The

second is finding the “right” capabilities in volunteers (such as a history nonprofit management, an understanding of the organizations strategy, program areas, and target populations, and having useful contacts). The third is utilization - best using your volunteers’ skills and abilities. He recommends drawing these skills out through formal, in-person orientation sessions and ongoing training of volunteers (pp. 9-12).

Recognizing that volunteers are the life blood of our target associations, that there will undoubtedly be turnover and setbacks, and that volunteer positions may be unfulfilled, volunteer recruitment appears to be an ongoing concern in the planning and management of a volunteer association. Barr et al (2006) compiled recommendations for nonprofit and voluntary organizations to improve volunteer recruitment and retention, most of which are applicable to smaller, volunteer associations, namely:

- “Develop strategies to accommodate volunteers who can only make short-term commitments
- Develop skill assessment procedures so that volunteers’ skills can be better matched with positions
- Minimize volunteer turnover by recognizing that some volunteer positions are very demanding, and attempt to limit the amount of pressure that volunteers experience by providing support and supplementary training
- Establish volunteer management programs
- Develop volunteer recognition programs
- Offer training to volunteers
- Validate volunteer positions by writing clear position descriptions,
- Incorporating volunteer contributions into organizational mandates [by] providing certificates for training and reference letters”(p. 5)

Barr et al touch on an important tool that can be overlooked. In Kreutzer and Jäger’s 2011 work, they reinforce a seemingly obvious solution to many challenges; everyone (paid or volunteer members) “reported how important it was to thank the volunteers and to acknowledge their achievements on a regular basis. It seems to be part of the volunteer organizational culture to continuously ensure volunteers of their importance for the organization,” (Kreutzer & Jäger, 2011, p. 644). Regularly contact (quarterly), including thanks and ongoing clarification of roles correlates with volunteer retention (Leviton, Herrera, Pepper, Fishman, & Racine, 2006, p. 203). It is likely, Leviton et al note, “that regular contact with volunteers engenders satisfaction and loyalty to the program and, as a consequence, a willingness to continue to serve” (p. 206).

Summary discussion

1. How can volunteer-run organizations (in particular, nonprofit, professional associations) match capacity and interests of the volunteers with the expressed needs of the organizations?
2. What can we (CESBCY) learn from the literature on effective strategic planning and implementation that could apply to the mid-term update to the CESBCY Strategic and Marketing Plan?

Our research target (volunteer run, nonprofit, professional association) is nearly totally dependent on its volunteer-members for all of its planning, ongoing management, and evaluation. In similar organizations, there is often a core group of volunteers that complete most of the associations' activities and have developed expectations for the future of the organizations and their own roles in them. Organizations benefit from the free time and effort provided by these individuals, and face the reality that volunteers may leave if they aren't completely satisfied with their experience. The smaller the organization, the more dramatic the loss of an existing volunteer. Volunteers' loyalty is an ever-present concern for a volunteer association.

Matching volunteers to the needs of the association then begins with an understanding the interests of existing volunteers. As much as possible, the idiosyncrasies of existing volunteers' motivations, skill levels, and availability need to be accommodated (Wisner et al as cited by Harris, 1998). Ongoing volunteer recruitment, management, and recognition are critical to supporting these volunteers.

The association then identifies the range of potential opportunities starting with the association's mandate and its strategic priorities, going on to describe the tasks and available resources along with the qualities needed for each task. Selection criteria including volunteers' relative interests, availability, motivation and goals, and work style preferences can then be used to match or reshuffle tasks to the individuals who step forward.

A volunteer professional association may experience tensions between the professional standards they employ in their own working life and the basic democratic structures of a peer managed organization (i.e. the time needed for consensus-based decisions and the pace of effort in a volunteer run association). This should be recognized in the identification of volunteer opportunities and in a written description of the roles assumed by volunteers.

For volunteer associations, strategic planning must include the variability in current and future volunteers' skills and capacity, alongside its financial resource planning. As goals are developed care must be taken to identify existing and potential volunteers who could reasonably be expected to undertake the associated activities. Priorities may need to change to accommodate the capacity of those who come forward to volunteer.

Once volunteers have stepped forward an intentional effort to provide training to volunteers will make their association more effective. This includes in-person orientation to the association, written roles for all volunteers, and which resources are available (or not) to support their efforts. Volunteers benefit from being needed without being over burdened, from having autonomy to undertake and complete clear tasks, from ongoing contact between volunteers and opportunities to work with other volunteers, and from doing so on a flexible schedule. These characteristics engender commitment to the association. Proactive recognition of the efforts and achievements volunteers have made engenders loyalty.

Research process

Research for this literature review was limited to online research. The initial research questions identified in the proposal and Terms of Reference (ToR) for this literature review were, "Is the SMP a useful tool for Chapter management and planning?" and "What can we (CESBCY) learn from the literature on effective strategic planning and implementation?" The first step for research was Google Scholar. An initial online search for reference materials related to these broad research questions resulted in huge numbers of potential sources, as noted in Figure 25.

Figure 25 Online search results for initial research questions

Search terms	Number of results
strategic plan* + implementation	1,510,000
strategic plan* + evaluation	1,500,000
strategic plan* + implementation +effective	1,270,000
strategic plan* + implementation +effective +professional association	232,000
strategic plan* + evaluation + nonprofit	42,800
strategic plan* + implementation +evaluation +effective +professional association +volunteer	30,300

Based on this initial breadth of responses, I returned to the project steering committee to further scope the literature review to address issues of pressing need for the CESBCY. The research questions were then recast and additional details discussed. This resulted in the following research questions:

1. How can volunteer run organizations (in particular, nonprofit, professional associations) match capacity and interests of the volunteers with the expressed needs of the organizations?
 - a. Which organizations are we discussing? How do we define them?
 - b. How do smaller volunteer-run organizations compare with other, larger organizations?
 - c. Are there characteristics of volunteers that should be considered?
 - d. What about the long term volunteers, who commit to their associations and act as a volunteer Executive, how might they be most effective?
 - e. What challenges do volunteer associations face?
 - f. Are there specific planning and management considerations?
2. What can we (CESBCY) learn from the literature on effective strategic planning and implementation?
 - a. What are the typical processes - steps - for drafting and renewing a strategic plan?
 - b. What role is a strategic plan meant to play, or better said, 'how should an organization use a strategic plan?
 - c. Under what conditions should an organization (nonprofit, professional association) seek to update their strategic plan?
 - d. What are the benefits / risks of changing a plan before its planned end point? Are there any?

e. Is there a checklist for a 'good' strategic plan?

This led to a more manageable list of sources returned through Google Scholar, as noted in Figure 26. For each of these results, a given number of pages on online results were then reviewed.

Figure 26 Online search results for defined literature review questions

Search terms	Number of results	Pages reviewed
strategic plan + renewal	147,000	3
processes for making a "strategic plan"	110,000	5
how to make a "strategic plan" ^{since 2009}	19,300	2
processes for making a "strategic plan" ^{since 2013}	8,670	4
volunteer organizations" + volunteer capacity + organizational needs	3,650	3
"strategic plan*" + evaluation + not-profit	388	6
volunteer interests meeting organizational needs in "volunteer run organizations"	44	All
volunteer interests matching organizational needs in "volunteer run organizations"	28	All
"nonprofit", "professional association" when to "update" "strategic plan"	93	All
"nonprofit", "professional association" when to "strategic plan update"	1	All

Relevant sources available openly through Google Scholar were downloaded from that site. Sources (books and journal articles) that appeared to be relevant, but were not available through Google Scholar were then searched for by name and/or author in the University of Victoria online library system. All but one of the sought for sources was retrieved through these means. Further searches were then conducted in through Google.ca. A small number of grey literature sources were identified through this process, although none further proved useful in the discussion and analysis of the issues included in this literature review.³¹

Each downloaded source was reviewed to determine its relative relevance and, where applicable, themes and useful passages were identified. A large number of the resources identified in this literature review focused exclusively on large, nonprofit organizations with a separation between volunteers, paid staff, Boards of Director, Trustees of the organization and Chief Executive officers (for example, (Miller-Millesen J. L., 2003), (Buchanan, 2005) and (Stone & Ostrower, 2007)). Many of these articles were excluded from this review, for as Harris notes, "findings from studies of more formalized nonprofits that employ substantial numbers of paid staff cannot be assumed to apply necessarily or equally to voluntary associations." (1998, p. 154). Given the limited research on small, volunteer run, nonprofit associations, identifies sources were reviewed for even the briefest of ideas and findings that could be useful to the

³¹ Resources identified in this search of grey literature were applicable to other issues identified by respondents during consultations. These resources were set aside for use during other stages of the review and update of the SMP.

Chapter and its onward evaluation and planning. The remaining identified passages were then separated and sorted by themes. The findings and discussion presented above follow this order.

Internal document review

An internal review of available Chapter documents was implemented to address the evaluation questions: In particular, the 2008-2012 SMP itself, available CESBCY Executive Meeting Minutes, CESBCY Annual Reports and additional documents made available by the CESBCY Executive and found on the Chapter's or CES National's website were reviewed.

Has the environment changed?

Internal documents touch on a number of the changes to the Chapter's operating environment in the years following the adoption of the SMP; in particular, the changes within CES itself. While some of these changes were anticipated, not all were foreseen when the SMP was being drafted.

The earliest internal document reviewed was the CES National 2007-2008 Annual Report. The completion of the SMP is noted in this report, along with a small number of other activities (Canadian Evaluation Society, 2008). This report indicates a relatively consistent number of CES members in the Chapter (145 members in 2007, 142 in 2008). This provides a partial baseline to the SMP objective 'CESBC membership is growing and satisfied' (Canadian Evaluation Society - British Columbia Chapter, 2008).

Starting in 2009, CES experienced structural changes. The Northern Chapter dissolved, its Yukon-based members joining their colleagues in British Columbia (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009). That same year, the cost of membership in the CES increased substantially (i.e. from \$125 for an individual to \$165, an increase of roughly 30%), (Canadian Evaluation Society, 2008). While successful on a number of fronts (see below), the 2010 Conference highlighted exiting administrative and financial challenges that existed between the Chapter, as organizer and manager of the National Conference, and with CES National and in particular its then-Secretariat service provider. This contributed in large part to a delay in the finalization of the financial accounts for the Conference until over past the end of the Conference (Canadian Evaluation Society, 2011). By the beginning of 2013, the national secretariat service-provider had changed.

Subsequently, CES National developed a 2012-2015 Canadian Evaluation Society Strategic Plan, (2013). The Plan states that CES National Council has leadership responsibility, in coordination with Chapters on the needs, design and delivery of CES programs in the Chapters. Each Chapter has an obligation to ensure that the programs are consistent with the mission and goals of CES, and meet any standards that may be established by the National Council. Access to Directors' Liability Insurance, CES courses, and usage of the CES logo and name are agreed upon aspects of this relationship. Within CES National, there were efforts to streamline its administrative processes. This included changes in committee structure, including some rationalization, but also loss of advocacy committee (Canadian Evaluation Society, 2013).

In January 2012, CES adopted the Program Evaluation Standards developed by the Joint Committee on Standards for Educational Evaluation (JCSEE), "These standards guide and inform the practice of evaluation and deal with the utility, feasibility, propriety, accuracy and accountability of evaluation and evaluators' (Canadian Evaluation Society, 2013).

New values were developed for CES, along with strategic issues for the Society nationally; see Figure 27 (Canadian Evaluation Society, 2013).

Figure 27 Canadian Evaluation Society Values and Strategic Issues (2012-2015)

VALUES

Inclusiveness – Members value the diversity inherent in the communities in which they work and strive to ensure their methods are appropriate to the culture and context of these communities. As an organization, CES reaches out to ensure the diversity of the Canadian population is reflected in its membership.

Social Commitment – Members participate on a voluntary basis and choose to give freely of their time and knowledge as a positive and essential expression of social commitment to evaluation and societal benefits from evaluation.

Accountability – Members accept responsibility for her/his actions as they relate to evaluation practice and activities conducted on behalf of CES.

Transparency – Members openly disclose values, purposes, expectations, actions and conclusions while providing complete and honest information. (PDP Report Jan'12)

Wisdom – Members respect the ability to make good judgments based on what is learned from experience.

STRATEGIC ISSUES

Issue 1: *Organizational Infrastructure*

Goal: By June 2015, CES will have completed infrastructure improvements to support the future sustainability of the Society and its contribution to the field of evaluation in Canada and internationally.

Issue 2: *Professional Learning*

Goal: By June 2015, CES will have processes in place to report on member, Chapter, national, and international involvement in professional development and the PDP program and the extent to which the field of evaluation has changed.

Issue 3: *Advocacy*

Goal: By June 2015, CES will have promoted evaluation for the betterment of program sponsors, program beneficiaries, and society

Issue 4: *Strategic Partnerships*

Goal: By June 2015, CES will have developed strategic partnerships and networks, such that purposeful working relationships are established and leadership momentum is maintained.

Programs and services offered to the Society's membership changed since the SMP was developed. In some cases these options were CES programs and services. In other instances separate organizations developed programs and services, later partnering with the CES. The CES Education Fund (CESEF) is a charity that had previously separated from the CES. By 2009, CES finalized a structural relationship with the CESEF that supports the joint offering student oriented programs (Canadian Evaluation Society - British Columbia and Yukon Chapter). This relationship grew to allow CES members to concurrently donate funds to the CESEF when renewing or beginning their CES membership.

The CES' Professional Designations Program, which oversees the Credentialed Evaluator designation, was approved in 2009 (Canadian Evaluation Society - British Columbia and Yukon Chapter). The associated Competencies for Canadian Evaluation Practice were released concurrently (2009). That same year, the Canadian Journal of Program Evaluation (CPJE) ceased to be a member-only benefit and became available free online to all (Canadian Evaluation Society, 2013).

The Consortium of Universities for Evaluation Education (CUEE) formed in 2008 to "increase opportunities for current and prospective evaluation professionals to acquire the knowledge and skills required to become evaluation practitioners" through cross-accreditation and coordination of university-level evaluation training (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2009). In 2009, the CES provided financial support to the CUEE.

The Chapter provided significant support to a grassroots initiative to develop a mentoring program for evaluators in Canada (Evaluation Mentoring Canada, 2011). Evaluation Mentoring Canada subsequently received additional financial support from other chapters and CES National (2011).

Which activities has the Chapter undertaken?

A review of available internal documents provides additional details to the events and activities described online; in particular, the Chapter's significant efforts to host the 2010 CES National Conference in Victoria (May 2-5, 2010). The Conference facilities were secured in May 2007 and planning began in earnest in the Spring 2008, just as the SMP was coming into force (Canadian Evaluation Society, 2011). Nineteen volunteer members worked together to manage the Conference Organizing Committee (COC) of nearly forty volunteers, in addition to those who volunteered their time as part of the Volunteer Chapter Executive.

Also in 2010, a survey of the Chapter membership was released to determine the professional development needs of the Chapter. Respondents provided ideas and feedback on desired training topics, potential trainers, costs, timing and training duration, willingness to travel, and preferred delivery method for professional development.

A year following, the Chapter committed significant support to an independently developed mentoring initiative. The Chapter's identified a convergence of goals of the Core Mentoring Working Group (CMWG,

now Evaluation Mentoring Canada, EMC) and the Chapter’s own SMP goal to support mentoring. CESBCY committed funding, provided joint banking services, record keeping, and hosted an interim webpage on the Chapter website.

What successes have been achieved by the Chapter since 2008?

The Chapter identified 53 actions to be undertaken in its 2008-2013 Strategy, “set out in detail, on a goal-by-goal basis” (Canadian Evaluation Society - British Columbia Chapter, 2008, pp. 13-27). While many of these are noted in the above themes, it is useful to consider the collection of actions in their totality to get a sense of the breadth of effort undertaken and significant number of successes achieved.

The Chapter assigned a relative priority level (urgent, high, medium, low, desirable) to each of the 53 planned actions in the SMP. Where applicable, the need to have activities completed in advance of the 2010 Conference was also identified. In summarizing these activities, the proportion deemed to be high or urgent priorities (nearly two-thirds) is noticeable, (see Figure 28). Half of the identified actions are high priorities, while a further six of the 53 are urgent.

Of the 53 actions, there is good evidence that more than half (n=28) were completed in full. A further nine (17%) have been started and/or are partially complete. In total, the Chapter volunteers were able to complete or partially complete 70% (n=37) of the identified actions, most of these within the first two years of the SMP.

Figure 28 Number of planned actions completed

	Action complete and/or ongoing	Partially complete	No action taken / no evidence thereof
6 actions (11%) Urgent	4	2	
28 actions (53%) High + High 2010	14+2	4+1	4+3
14 actions (26%) Medium + Medium 2010	7+1	1	4+1
6 actions (11%) Low + Desirable		0+1	1+2
53 actions (100%) Total	28 (53%)	9 (17%)	15 (28%)

The individual actions are not small tasks. Appendix C Annotated SMP Performance Framework has an annotated description of which actions were fully or partially completed, and which remain.

What barriers have the Chapter faced? Were / how were these overcome?

Documents described challenges related to the volunteer effort to host the 2010 National Conference. “The 2010 volunteer corps on site at the conference was about half the number recruited for the 2009 conference in Ottawa (84)” (2010 Annual Conference, Report of the Conference Organizing Committee).

There was an “unanticipated level of effort on behalf of the conference organizers and the committee of volunteers... those particular volunteers have by and large stepped back from the Chapter” (2011). Similarly, the “relationship between the Chapter and CES National/its Secretariat” were identified and resulted in “significant delays in reconciling financial records, managing budgets and expenses, accounting for undefined fees (2011).

Is the SMP a useful tool for Chapter management and planning? How do we know we were successful? Are the measures being used?

The Chapter has feedback tools included as part of its website (Report to National Council, 2009), including whether the Chapter has a full slate of officers. These details are then reported to Chapter members and CES National (Report to CES National from the BC/Yukon Chapter, 2012). A survey of Conference participants and a review of registration details were used by the Chapter to identify related successes. This included provincial members’ participation (105 of 422 registrants, including 37 new registrations) and whether participants’ expectations were met (87.5% of the respondents indicated that their Conference experience met or exceeded their expectations), (2010 Annual Conference, Report of the Conference Organizing Committee, 2011). Evaluation Mentoring Canada identified the support received to date in its 2011 poster presentation (Mentoring Evaluators : What's Happening in Canada (Poster presentation from AEA and CESBCY AGM)).

The Chapter reports on the number and responsibilities of its volunteers (2007-2008 Annual Report).The Chapter uses and reports on membership figures, separating out CES members in good standing and individuals made up of event attendees and mailing list recipients. CESBCY also reports on the additional efforts of its volunteer members, e.g. Chapter members volunteering with CES-CESEF Case Competition organizing committee (Report to CES National from the BC/Yukon Chapter, 2012).

Research process for internal document review

Documents were identified through consultations with the representatives from the CESBCY Executive, through a review of the website, and through a review of the Chapter’s forum system. These documents were sorted by year and topic. Each document was then reviewed against the evaluation questions identified, in a matrix format and then summarized here.

Online research

Has the environment changed?

Federal evaluation

When the Chapter’s SMP was drafted, federal policy required that all ongoing Grants and Contributions (Gs&Cs) programs be subject to evaluation at least every five years. In the intervening period the context of federal evaluation policy changed. A new federal *Policy on Evaluation* came into force in 2009 (Treasury

Board Secretariat of Canada, 2009). Based on the *Financial Administration Act* (Justice Laws Website, R.S., c. F-10, s.42.1), this federal policy went on to increase the evaluation coverage to add all other types of ongoing direct program spending, also at least every five years. This represents a significant amount of government spending that is subject to evaluation each year, i.e. in 2010–11, \$5.53 billion³² of government spending was evaluated (Treasury Board Secretariat, 2011, p. 3).

Heads of evaluation in large federal departments and agencies (LDAs) report to their “deputy head either administratively (51 per cent) or functionally (31 per cent),” (Treasury Board Secretariat, 2011, p. 3). Further, these heads of evaluation are supported by teams of evaluation specialists and support staff. As reported in the 2011 Annual Report on the Health of the Evaluation Function, the federal government employed 497 full-time (or equivalent) people in the evaluation teams of the LDAs. These teams averaged slightly more than thirteen evaluation specialists, support staff and Executives (p. 2). In addition to these internal evaluators, the federal government contracts out to external evaluators. “In 2010–11, 73 per cent (99 of 136) of evaluations conducted by LDAs involved the use of contractors for at least some part of the work, whereas the remaining 27 per cent did not use contractors at all” (pp. 15-16).

In addition to the 2009 Evaluation Policy, the federal Treasury Board Secretariat (TBS) has collected together a number of ‘working tools’ for evaluators in the federal government or contracting to complete a federal evaluation. This includes the Evaluation Policy Suite (e.g. the Policy and related), Evaluation Guidance (e.g. on measurement tools or program theory), Annual Reports, Reference Material and Other Tools and Resources (Treasury Board of Canada Secretariat).

While federal programs in British Columbia and the Yukon are evaluated to the federal standard, it is difficult to determine from online resources how many of these are led and/or managed by locally-based internal or external evaluators as compared to evaluators based in Ottawa or elsewhere.

Yukon evaluation

A search of the Yukon government website does not lead to a specific evaluation policy. An online search for Yukon government evaluators found very few hits from the prior dozen years. Nonetheless, and likely as a result of federal influence, it is relatively easy to find published evaluations with Yukon organizations, e.g. [Health and Social Services](#), [Women's Directorate](#), [Tourism and Culture](#), and [Education](#).

Evaluation in the Yukon government is changing. In April of 2012, the Deputy Ministers Human Resource Committee (DMHR) of the Yukon government initiated a process to study and report on “creating a culture and consistent practice of adaptive planning and evaluation in the Government of Yukon” (Yukon Government, 2012). The goal of the program is limited. As noted online, the program is “not to produce certified or component evaluators, but to provide participants with the confidence and skills they need to be successful in planning, managing and overseeing ongoing evaluation in their respective program

³² This includes \$1.83 billion of Grants and Contributions funding and a further \$3.70 billion of non-Gs&Cs direct program spending.

areas.” A pilot project within the program is scheduled to run from May/June 2013 until January/February 2014(Yukon Government, 2012).

In addition to the evaluation work underway within the territorial government, the Yukon volunteer sector has evidence of ongoing evaluative practice. Volunteer Yukon, a nonprofit organization that supports other nonprofits, has a list of professionals willing to volunteer their time. This list includes eight professionals willing and able to provide evaluation services (Volunteer Yukon, 2013). Interestingly, not all evaluators listed on this site are on the Chapter members or mailing list contacts.

British Columbia evaluation

As with the Yukon, a search of BC government websites does not lead to a specific evaluation policy.

There are examples of evaluation use in the British Columbia. In reviewing a small sample of evaluation reports for programs based in British Columbia, I found federally funded programs evaluated for the federal government, nonprofit organizations’ evaluation reports and a small number from the [BC Ministry of Health](#), and other ministries and agencies, notably in the [Ministry of Forests](#). The BC Forest and Range Evaluation Program includes tools for staff and evaluators, as well as completed reports and papers related to evaluation. FREP has links to outside evaluation resources, including a link to the Chapter website in its list of resources for its own website visitors.

The BC government provides an online directory of its staff and positions (Government of British Columbia, 2013). Searching for the term ‘evaluation’ results in 36 people in 12 ministries, (see Figure 29).

Figure 29 Number of evaluation personnel in BC government

Ministry of Jobs, Tourism and Skills Training	8 people
Finance, Administration & Performance Evaluation (1)	2 vacant
Labour Market Programs Branch (1)	
Policy, Evaluation and Planning Unit (5 + 2vacant)	
Tourism Strategy, Policy & Research (1)	
Ministry of Justice	8 people
Police Services Division (7)	
Strategic Information & Business Applications (1)	
Ministry of Health	6 people
Drug Use Optimization (3)	1 vacant
Emergency Medical Assistants Licensing Board (1)	
Health Outcomes and Economic Analysis (1)	
Program Evaluation (1)	
Policy, Outcomes Evaluation and Research people (vacant)	

Forests, Lands and Natural Resource Operations Sustainable Forest Management (2) Stewardship – Nadina(1)	3 people
BC Public Service Agency Business Performance Division (1) Hiring Centre (1)	2 people
Ministry of Citizens' Services Customer Service, DCV (1) Managed Inventory Unit, DCV (1)	2 people
Ministry of Transportation and Infrastructure Bridge Engineering Section (1) Traffic/ Electrical, Safety & Geometric Engineering Section (1)	2 people
Ministry of Agriculture Program Performance and Evaluation Unit (1)	1 person
Ministry of Education Office of the Inspector of Independent Schools (1)	1 person
Representative for Children & Youth Office of the Representative for Children and Youth (1)	1 person
Ministry of Environment Compliance Policy and Planning Section (2 vacant)	2 vacant
Ministry of Children and Family Development people IQA - Research, Evaluation & Accreditation – XCE (vacant)	vacant

Volunteer support

The literature review highlights the need to prioritize and appropriately train volunteers. Volunteer Canada and its local partners have developed a number of resources available to nonprofit organizations, e.g. Canadian Code for Volunteer Involvement (Volunteer Canada, 2012) that includes a series of checklists on essential training for volunteers. These materials and those of their civic counterparts (e.g. Volunteer Vancouver, Community Volunteer Connections, and others) are easily found.

Research process for online research

While not specifically identified in the Terms of Reference, I undertook a small amount of online research to supplement the other data collection processes. If a given data source inspired or alluded to a separate

idea then online research was conducted to attempt to fill this gap. For example, the literature review highlights the need for volunteers to be recognized in a proactive manner. Consultations with the Executive indicated that this is not a systemic practice. Online research was then initiated to determine if there were good practices or other resources related to volunteer recognition. Similarly, federal, territorial and provincial government policy documents were sought out in a similar manner, as was information on the relative size of the evaluation function in each of these levels jurisdictions.

As needed, I used Google to query related terms in brief online searches. This process was brief and not intended to be exhaustive.

Website review

Which activities has the Chapter undertaken? What successes have been achieved by the Chapter since 2008?

The development of a new website and its use for communications and the development of a community of practice featured highly in the Strategic and Marketing Plan. In 2009, the Executive approved the redevelopment of the website and volunteers stepped forward to design and populate the site with existing and new materials. Currently, the website includes:

- A membership database that includes
 - CES members in BC and the Yukon (156 regular members, plus 14 volunteer members of the Executive).
 - Mailing list recipients for CESBCY news and event notices (423 contacts). This includes past event participants, former members who have chosen to let their membership lapse for a period of time, people who simply receive the notices, CES members from other chapters who have an interest in BCY events.
 - Administrative support (2 people).
- An events database that allows for online registrations with tiered pricing and/or limited access to events by members, non-members or other classifications (e.g. student)
- Financial reporting based on event registrations and other income (e.g. from donations and membership renewals, which are not currently recorded using this function).
- Broadcast news updates (called email blasts) to all contacts. Contacts may opt out of this at any time. These email blasts track whether the email was opened and which links were opened. Records of these blasts are retained for future review or use.
- File storage capacity for attachments to email blasts, details for events, publication of Chapter reports or updates, as well as images and graphics related to the website.
- A public face to the website that has automated language translation from Google Translate, links to the Chapter's social media (CESBCY LinkedIn group page, @CESBCY on Twitter, CES on Facebook) as well as a link to the 'Propose an event' form (Canadian Evaluation Society - British Columbia and Yukon Chapter).

A list of the pages of the website is in Figure 30 followed by a screenshot of the front page (2013) in Figure 31.

Figure 30 Pages of the CESBCY website

- Home including a list of upcoming events and a blog feature that links to the Chapter's twitter account and has a standalone RSS feed
- Events listing all upcoming events in a calendar form and the ability to see all past events and links to a *Participant Feedback Form* for past events and a *Propose an Event* form that allows page visitors to suggest upcoming events
- Opportunities that originally included stand alone notices of upcoming events and appeared in the calendar for the website. The website was later updated to include two side-by-side scrolls of upcoming evaluation contracts, jobs, or other opportunities. Using RSS feeds, these originate with the CES National opportunities website and with opportunities from colleagues at the American Evaluation Association (AEA) and the International Development Research Centre (IDRC).
- Evaluation Service Providers a voluntary list of eleven evaluation service providers (many indicating additional areas of expertise) based in BC and the Yukon who provide contact information, a brief description of their skills and expertise along with a small graphic.
- Professional Designation (CE) a description of the designation and its requirements, with links to the CES National website for registration, along with a copy of the presentation announcing the CE and a sub-page with further background on the development of the CE
- Mentoring a brief description of Evaluation Mentoring Canada program that is funded in part by CESBCY and supported by the Chapter. This includes a series of presentations from the development of the EMC
- About CESBCY a brief description of the organization, its Vision and Mission, a description of the Strategic and Marketing Plan, along with links to the Executive Summary (available to all) and the full version of the SMP (in a password protected member-only section). There are also four sub-pages
 - Join CES with rates, benefits, resources and links to the CES National Registration details. There is also a link to a Past Member Feedback form
 - Student Initiatives, where the CESEF/CES student case competition and paper contest are described, including highlights of past student participation from the
 - Volunteer with CESBCY, listing some of the benefits of volunteering with the Chapter and volunteer opportunities
 - CES National and CESEF, describing the relationship between the Chapter and these national organizations
- CES Fellowship, listing the criteria and contact details for the annual Fellowship call from CES
- Executive Committee with pictures and contact details for each member of the Volunteer Chapter Executive
- Strategic & marketing plan review a blog of the progress for this project and its report development
- Professional Development listing upcoming events and filtering out other calendar entries (the now retired opportunities). There are four sub-pages with details on the standard training packages for the

Essential Skills Series, the Logic Models, and the Survey Research course. Past presentations are also featured here

- Evaluation is... including resources and some well known definitions for evaluation targeting those new to evaluation
- Register with CESBCY Website has the entry to the member only area repeats the benefits of membership and has a general description of the details included in the member only area. There is a place for registrants to self identify as members of the CES from the Chapter or elsewhere, or to ask to be part of the mailing list
- Member Zone includes a brief description of its sub-pages
 - Featured members with short biographies of members. This is not regularly updated
 - Member Directory where members can choose to make part of their profile visible to other members. (Currently, there are no records displayed)
 - Minutes and Reports with the minutes from Volunteer Chapter Executive meetings and AGMs, including the 2010 conference development report. This section has not been updated since 2011
 - 2008 - 2012 Strategic & Marketing Plan has links to both the Executive summary and full report, along with a presentation on the development of the Chapter Strategic Plan
 - By-laws has a downloadable and on-screen version of the Chapter's By-Laws
- CES Privacy Policy that applies to the whole of CES, including the Chapter
- Chapter Finance Policy has a downloadable and on-screen version of the Chapter's Finance Policy

Figure 31 Screenshot of CESBCY website

Canadian Evaluation Society
British Columbia and Yukon Chapter

The Canadian Evaluation Society (CES) is a volunteer-driven, professional organization of members who are dedicated to the advancement of evaluation theory and practice. CESBCY serves local members in BC and Yukon.

What's New RSS

Select Language | ▾

Upcoming events

See the [Events page](#) for all our upcoming events

Latest news and updates

Add post

<< First < Prev 1 2 3 4 5 ... Next > Last >>

Call for workshop presenters - CES2013 Toronto conference (Jan 30 deadline)

17 Jan 2013 06:57 | Anonymous

Planning for the [CES 2013 conference Evaluation Across Boundaries](#) is well underway! Pre-conference workshop sessions will take place on Sunday, June 9, 2013 at the Fairmont Royal York Hotel in Toronto.

CES is seeking high quality workshop presenters and are seeking ideas from the CES BC and Yukon Chapter.

Possible workshop topics include but are not limited to:

- Developmental evaluation
- Performance measurement systems
- Cost-effective program evaluation strategies
- Empowerment evaluation
- Innovation theories & techniques

[Read more](#) • [Add comment](#)

Join us June 21 in Victoria for our next lunchtime speaking event.
<http://tinyurl.com/co7rzak>

22 May 2012 11:28 | [Lisa O'Reilly](#) (Administrator)

Canadian Evaluation Society - British Columbia and Yukon Chapter

[Read more](#) • [Add comment](#) [Edit](#) • [Delete](#)

Update to <http://bc.evaluationcanada.ca/opportunities>

18 May 2012 12:39 | [Lisa O'Reilly](#) (Administrator)

We've played a bit with the technology so that we can pull opportunities from across the country. Take a look and let us know how you like it.

If you know of good RSS feeds for evaluation related positions, let us know and we'll pull them in to the same page for easy reference.

<http://bc.evaluationcanada.ca/opportunities>

[Read more](#) • [Add comment](#) [Edit](#) • [Delete](#)

<< First < Prev 1 2 3 4 5 ... Next > Last >>

[Propose an event](#) if you'd like to add one to the calendar.

Feel free to contact any of the CESBCY [Executive Council](#)

The webmaster's email is BCY_webmaster@evaluationcanada.ca

[CESBCY LinkedIn group page](#)

Follow [@CESBCY](#) on Twitter

CES on Facebook

Powered by [Wild Apricot](#) Membership Software

Membership

The SMP notes that CESBC had 145 members at the end of 2007, which was just under 8% of CES' national membership (1823), (Strategic and Marketing Plan 2008-2012, 2008, p. A15). When developing the SMP, the Chapter's members were concentrated in the Lower Mainland and Vancouver Island (p. 8). Comparing the location of CESBC members in 2007 and Chapter members in 2013, the Chapter's concentration in its two largest centers continues. 2013 figures show that nearly 89% of the Chapter's CES members are in Lower Mainland and on Vancouver Island (p. 8). The location for the Chapter's mailing list contacts are not all known, but for those that are known the trend is consistent. Nearly eighty percent of these contacts are based in the two major centres. Figure 32 includes the concentration of members in 2007 and 2013 (CES members and mailing list contacts).

Figure 32 Number and proportion of Chapter contacts in each region (2007 & 2013)

	2007 CES Members (n=145)		2013 CES Members (n=170)		2013 Mailing list contacts with known locations (n=238)	
	Count	Proportion	Count	Proportion	Count	Proportion
Interior	14	9.7%	17	10.0%	21	8.8%
Lower Mainland	76	52.4%	81	47.6%	118	49.6%
Vancouver Island	55	37.9%	70	41.2%	72	30.3%
Yukon and Northern	--	--	2	1.2%	27	11.3%

Figure 33 is a map of the Chapter membership at the time the SMP was developed. (Note, the CES members of the then Northern Chapter not included in the 2007 map. These details were not available at the time the map was developed). Figures 34 to 42 map the 2013 Chapter contacts.

Figure 33 2007 Map: All Chapter members

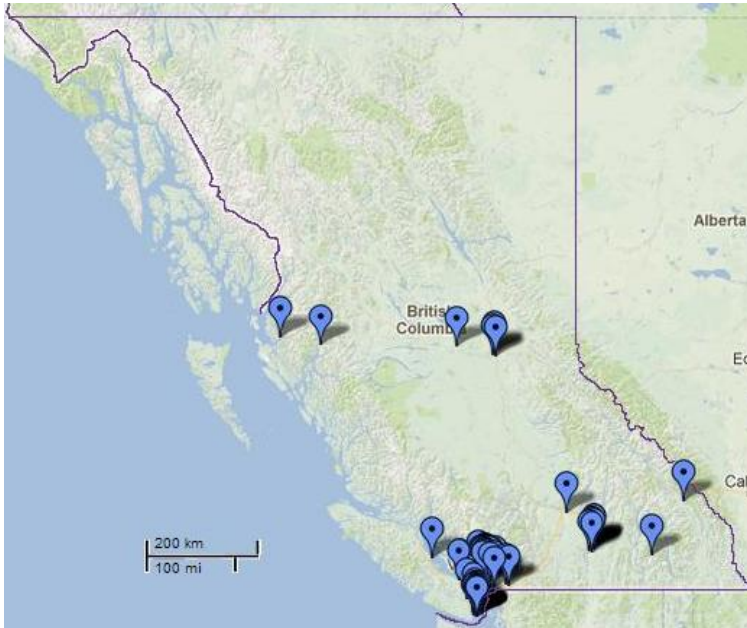
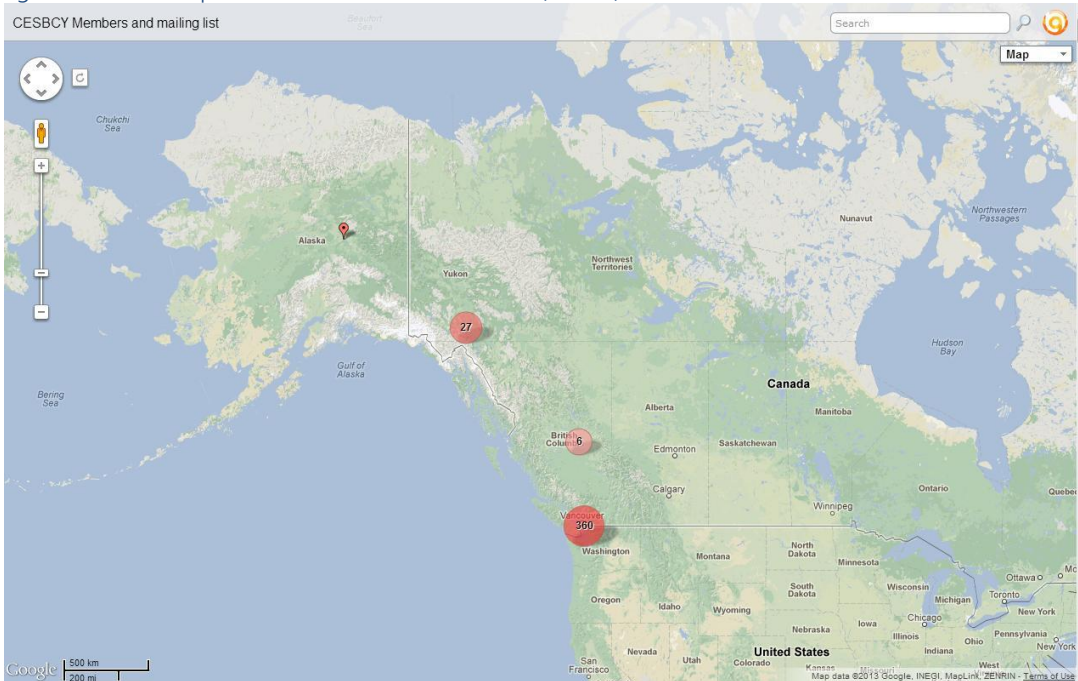


Figure 34 2013 Map: All contacts BC and the Yukon (n=394)



Not all mailing list contacts choose to include a complete address of work in their registration.

Figure 35 2013 Map: CES Members in BC and the Yukon (n=170)

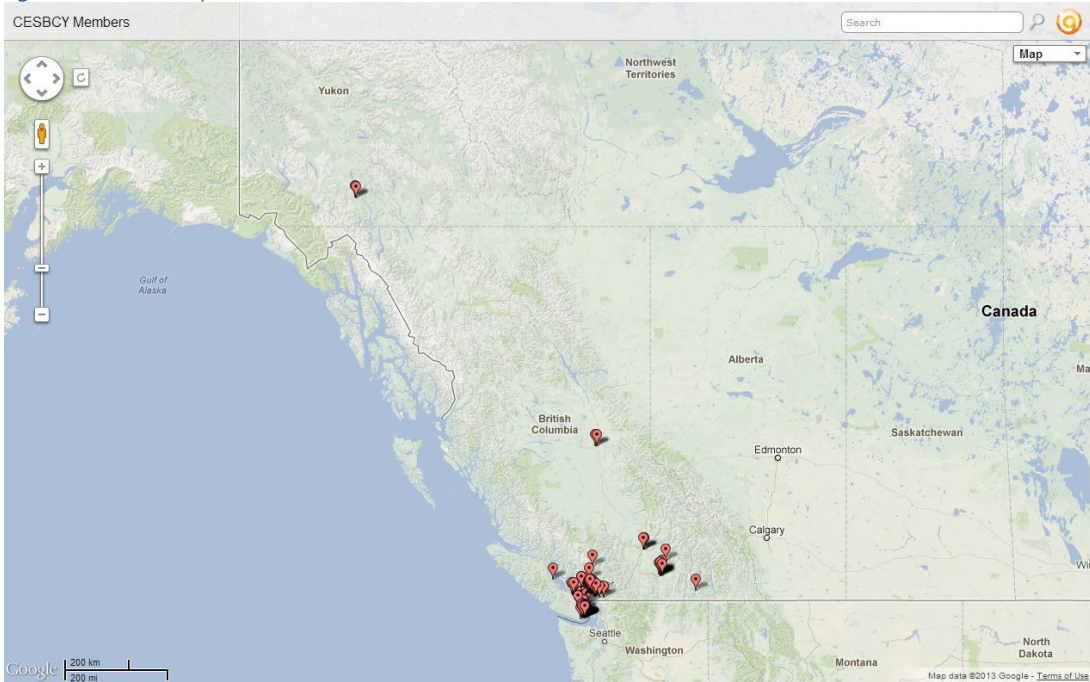


Figure 36 2013 Map: CESBCY Executive (n=14)

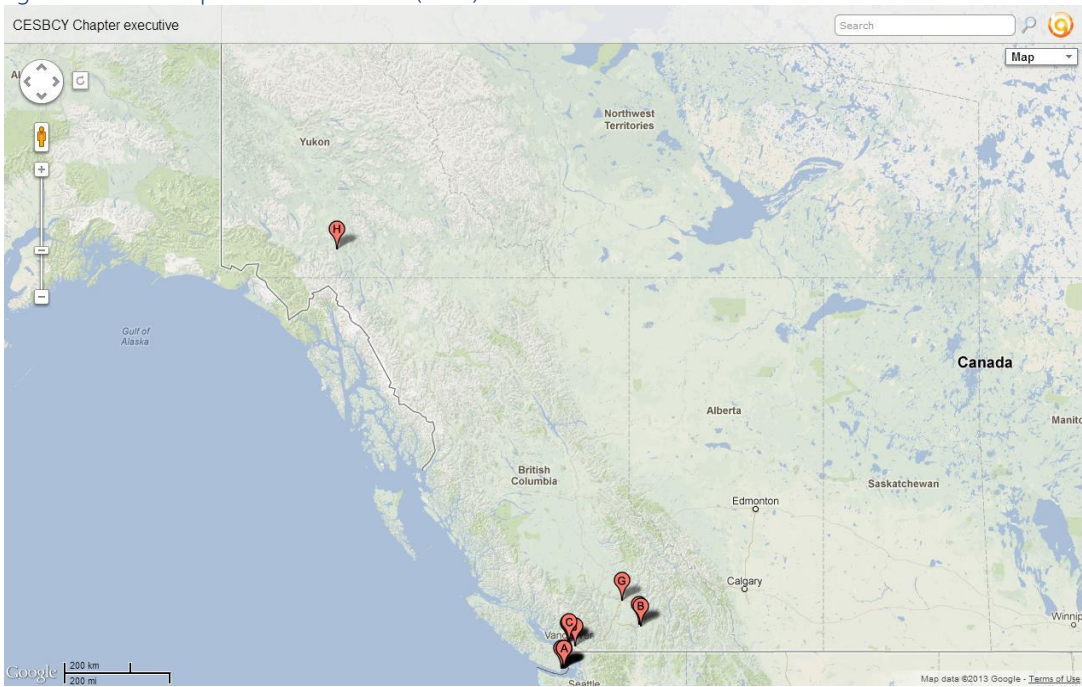


Figure 37 2013 Map: All contacts in the Yukon (n=26)

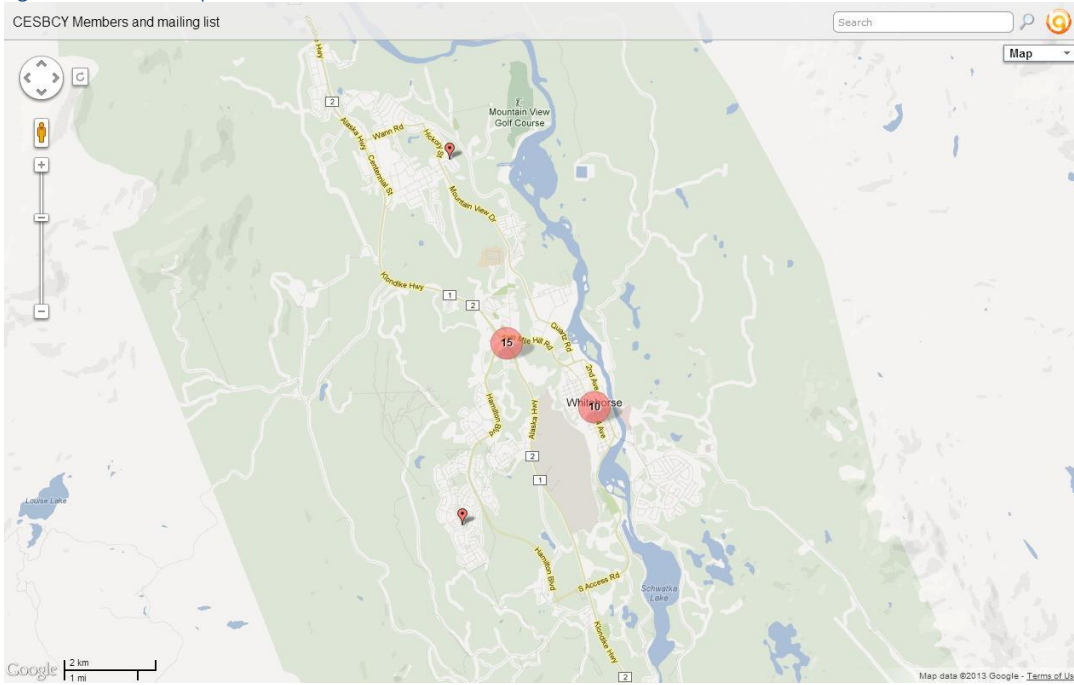


Figure 38 2013 Map: All contacts in South Western BC (n=345)

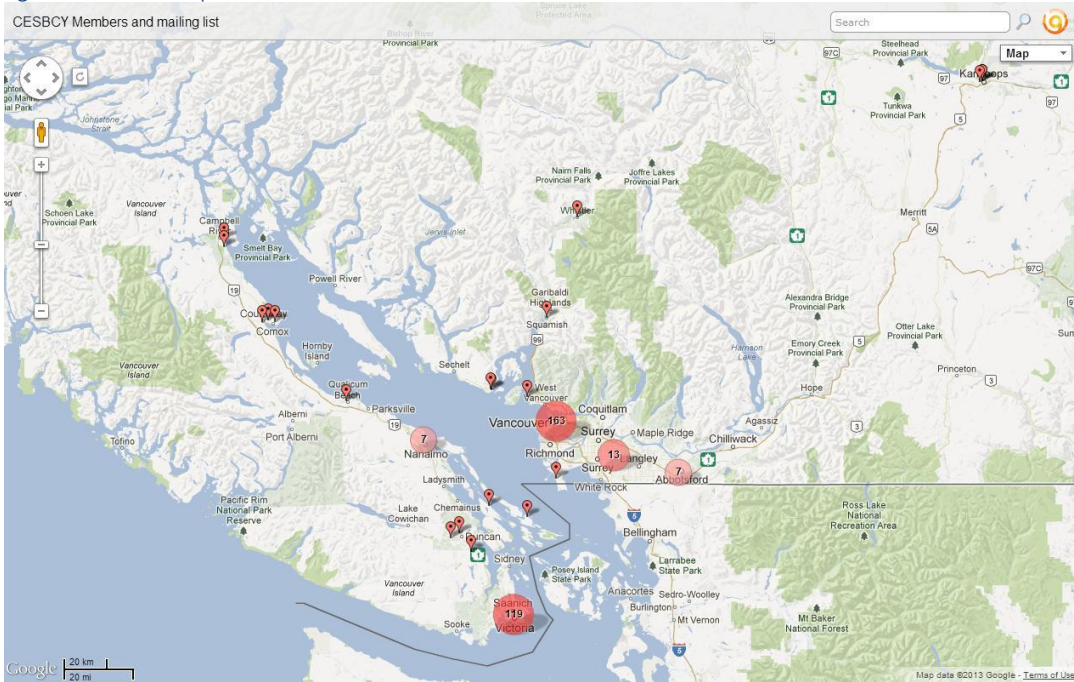


Figure 41 2013 Map: All contacts in Northern BC (n=6)

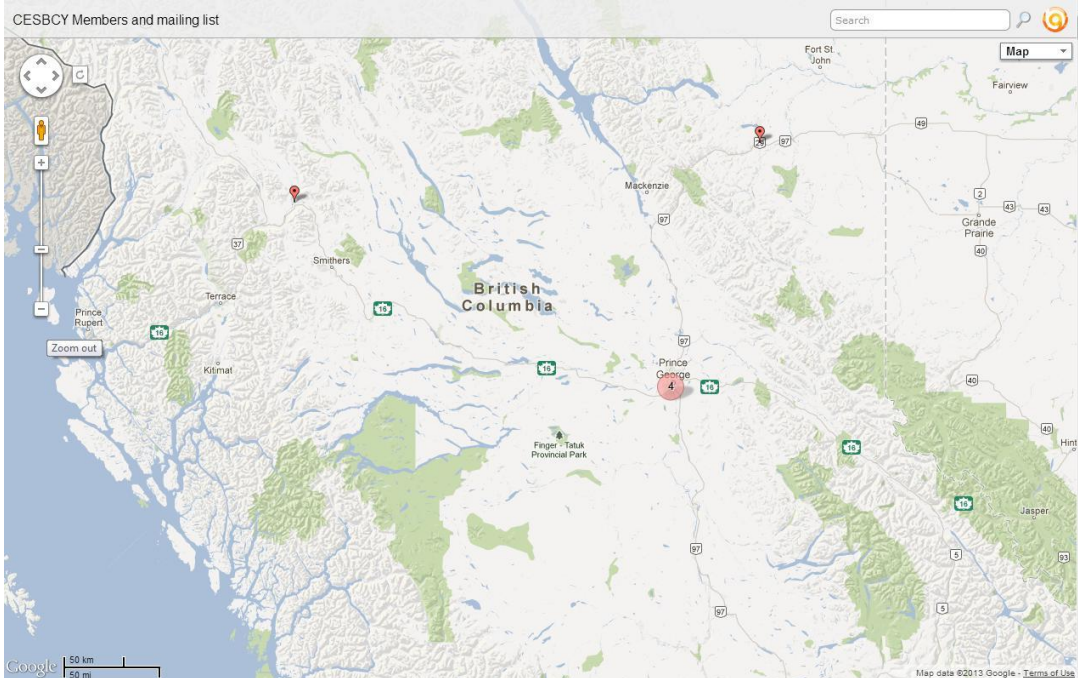
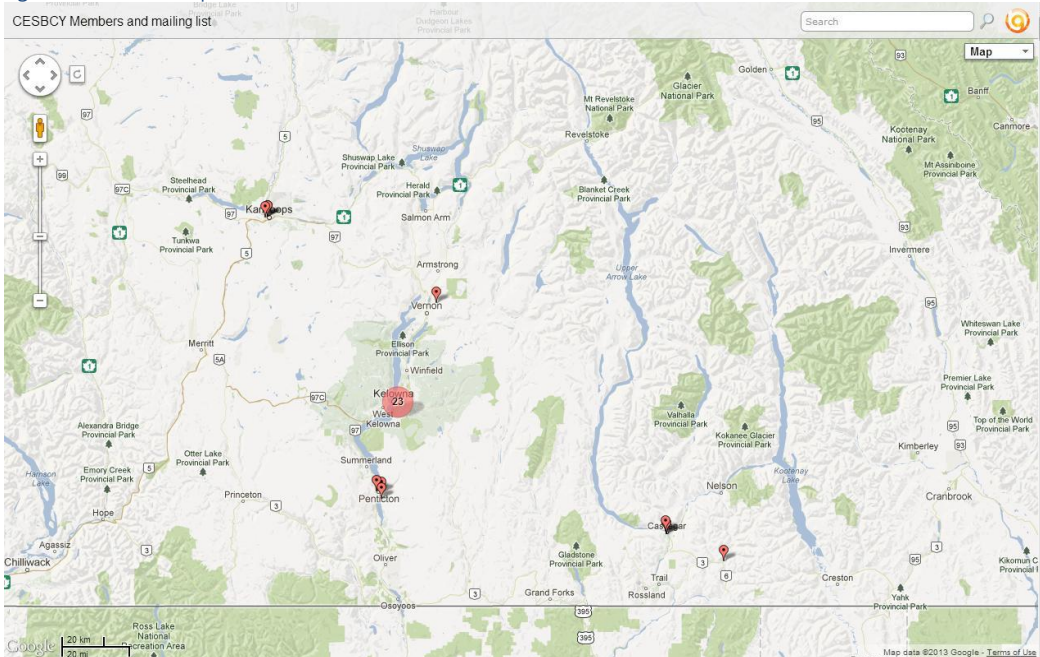


Figure 42 2013 Map: All contacts in South Eastern BC (n=33)



Events

The events database that allows for online registrations with tiered pricing and/or limited access to events by members, non-members or other classifications (e.g. student). From this database, it is possible to

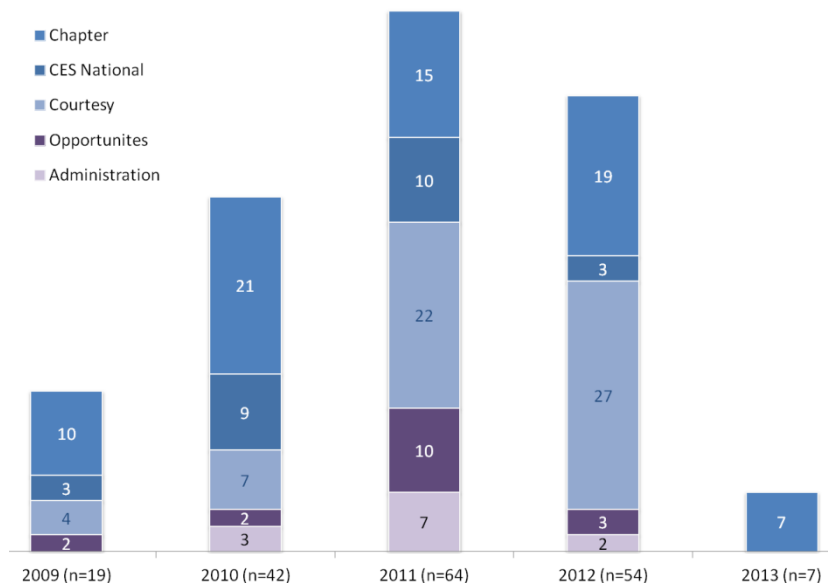
collect and compare the number of and type of events, and source of events for each year.³³ The database was downloaded for review and analysis in March 2013 and included event data beginning in April 2009, when the first events were listed.

The database includes a total of 186 events across four year, April 2009 to March 2013, including

- Chapter events: such as the lunch time events or full-day/multi-day training opportunities)
- CES National events: including the CES National Conference and online or telephone-based training
- Courtesy postings: training or other events of interest to members and Chapter contacts offered by other organizations
- Administrative posts: such as the Volunteer Chapter Executive meeting, allowing members to know when the Chapter meets and what is discussed
- Opportunities: for contracts and employment (in 2012, the website was updated to include an automated feed from the CES National opportunities list and discontinued the independent listing).

The greatest number of event posting was in 2011 (n=64). Forty-seven of these were training and networking events, including a significant number of courtesy postings (n=22). The number of training and networking events decreased the following year to forty-nine, the majority of which were courtesy events (n=27 in 2012). In 2013, the only events posted were those offered by the Chapter. Figure 43 includes a chart of event type by year (Events, 2013).

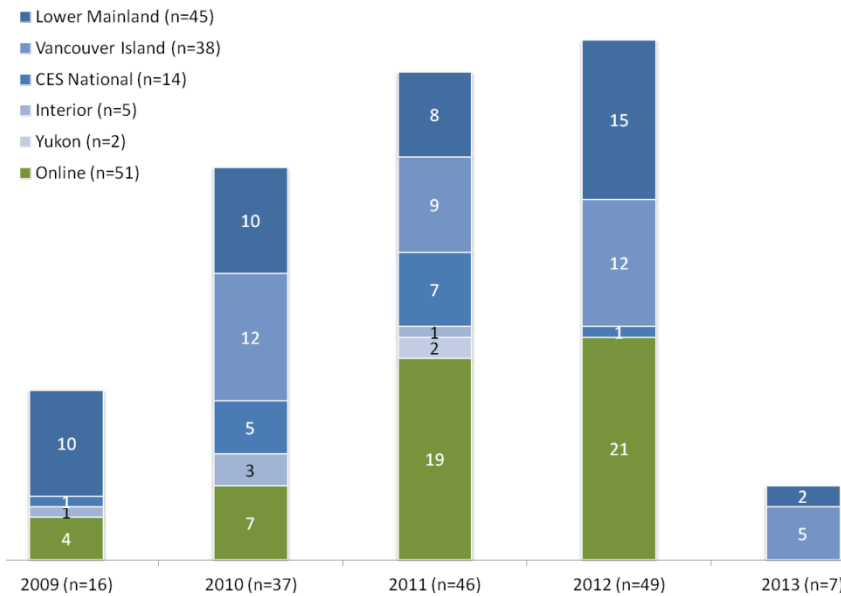
Figure 43 All events by type. April 2009 to March 2013. (n=186)



³³ While the website does allow for online registration 155 of the 186 events did not take include online registration; analyses of the type of registrants were therefore not included in this report.

Of the training and networking events listed between April 2009 and March 2013 (n=155), a third (n=51) were offered online. In-person training in Lower Mainland (n=45) and Vancouver Island (n=38) were the next most frequent, with a total of seven offered in the Interior (n=5) and the Yukon (n=2). Figure 44 has training and networking events, by year and location.

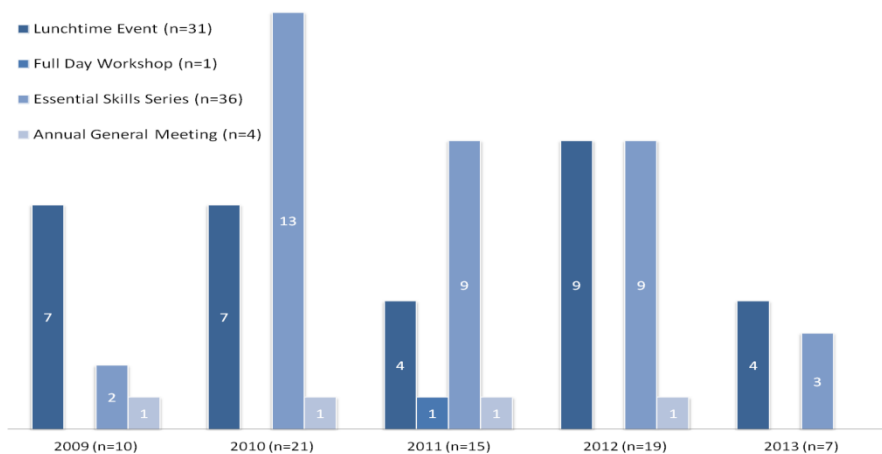
Figure 44 All events by year and location. April 2009 to March 2013



Across the four year period, the Chapter has offered a relatively consistent number of events to members and the wider evaluation community. The introductory Essential Skills Series is the most common event, making up half of the 72 events offered by the Chapter.³⁴ Figure 45 includes a breakdown of the events offered by the Chapter.

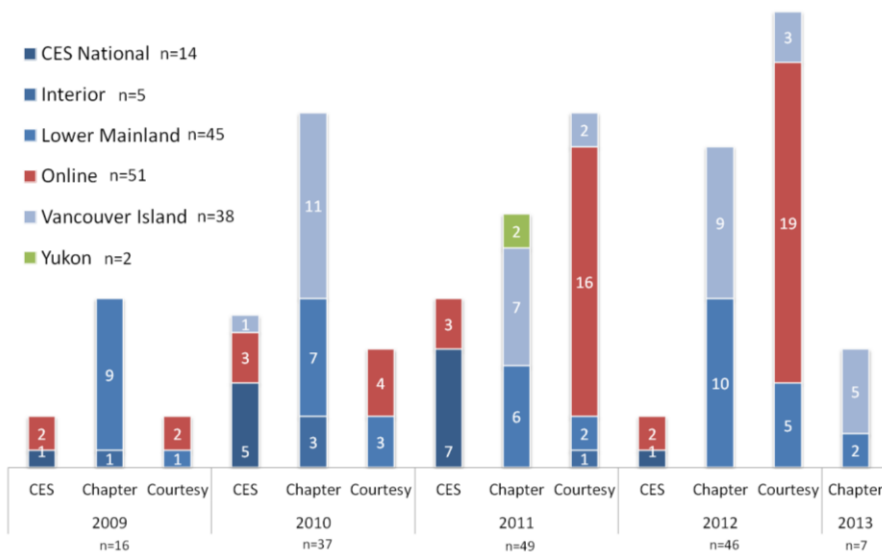
³⁴ When reporting on these, the ESS was counted to reflect the way in which it was offered, i.e. if a given four-day ESS training session was offered as a four-day event and two 2-day events, than 3 events are counted.

Figure 45 All chapter events by year. April 2009 to March 2013



Of the CES National events, some are provided online, while others are in-person across the country. The Chapter events and courtesy postings, are almost entirely in-person in BC or the Yukon or available online. In 2011 and 2012, courtesy postings make up a significant number of the events, notably a significant number of the online events. Figure 46 includes the number of events by source, year and type.

Figure 46 Number of events by location and type. April 2009 to March 2013



Is the SMP a useful tool for Chapter management and planning? How do we know we were successful? Are the measures being used?

Website Usage

The Chapter added Google Analytics to the website in September 9, 2010. The *Report of the 2010 Annual General Meeting of the Canadian Evaluation Society British Columbia and Yukon Chapter* included details

on Website analytics for the hosting website cesbc.wildapricot.org (pp. 17-18). To allow for easy comparison to this prior report, I have included the same headings here and added user types (new versus returning users), visit duration and bounce rate.

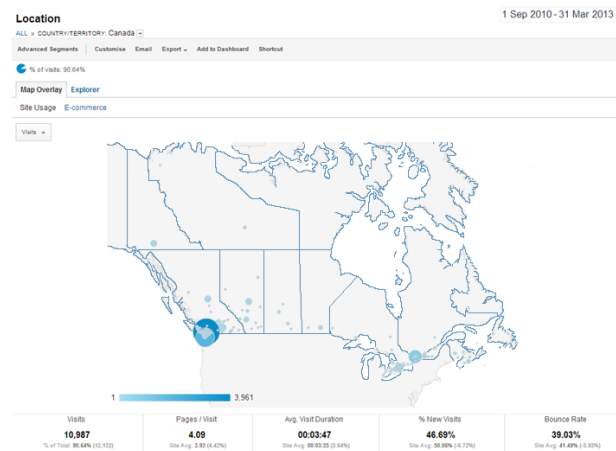
Where do our visitors come from?

About half of visitors are returning to the website (50.06%), while the remainder are first time (and potentially one-time) visitors to the website. Since September 2010, 90% of the just over 12,000 visitors to the website originate in Canada. Nearly half of these visitors are in Vancouver (32.8%) or Victoria (16.6%). Toronto and Ottawa account for just over 10% of visitors to the website. Figure 47 includes the ten most prevalent cities of origin for visitors to the website and Figure 48 maps the Canadian visitor sources.

Figure 47 Top ten cities of origin for website visitors. September 2010 to March 2013

	City of origin	Visitors %
1	Vancouver	32.88%
2	Victoria	16.60%
3	Ottawa	7.19%
4	Toronto	3.14%
5	Kelowna	2.24%
6	Surrey	2.10%
7	North Vancouver	1.96%
8	Whitehorse	1.91%
9	Edmonton	1.86%
10	Prince George	1.81%
	Total % listed	71.69%

Figure 48 Website visitors. (Canada only)



How long are visitors on the site?

Once on the website, a significant minority of visitors (41.49%) leave within moments (hit their 'back' key or close the window). On average, those visitors who remain on the website spend three and a half minutes on the site.

What are they looking at?

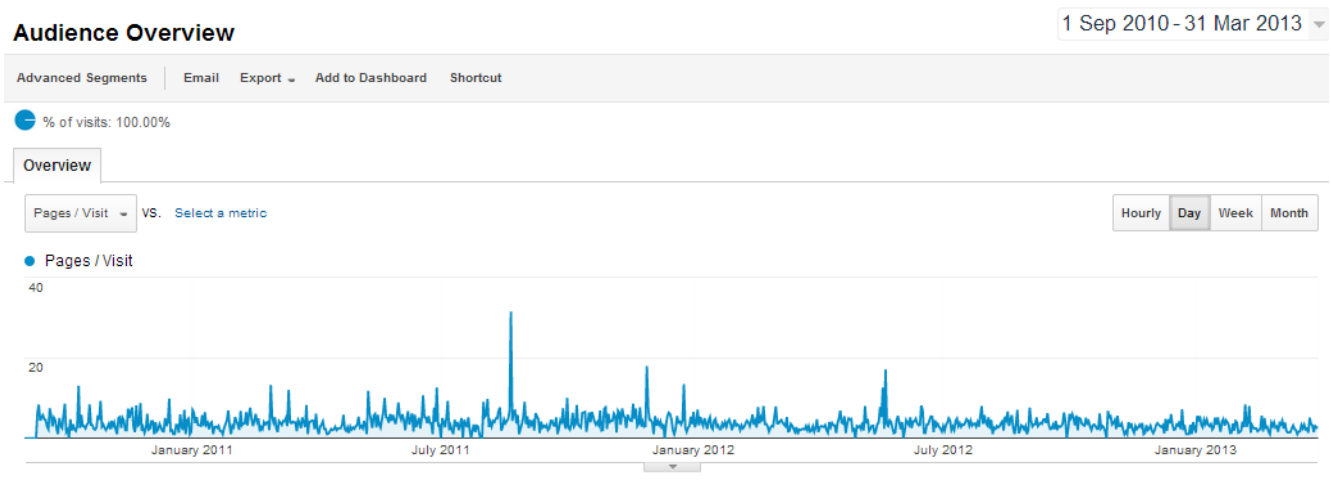
Visitors have been at least five times more likely to go to the website's home page (27% of visitors) or view events (21%), than any other information, see Figure 49.

Figure 49 Five most viewed website pages. September 2010 - March 2013

	Page Title	% Page views
1	CES BC and Yukon Chapter - What's New / Home	26.90%
2	CES BC and Yukon Chapter - Events	21.28%
3	CES BC and Yukon Chapter - Opportunities	4.29%
4	CES BC and Yukon Chapter - Evaluation Service Providers	2.86%
5	CES BC and Yukon Chapter - Essential Skills Series	2.72%
	Total % listed	65.15%

On average visitors would view four pages per visit. While relatively consistent over time, Figure 50 shows a small number of significant peaks in August 2011 (average 31 pages/visit on the day), November 2011 (18 pages/visit), December 2011 (13 pages/visit), and May 2012 (17 pages/visit).

Figure 50 Pages per visit. September 2010 to March 2013

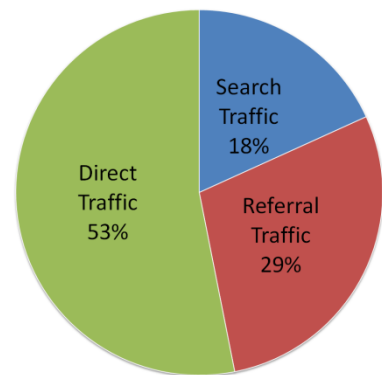


How did they find us?

More than half of traffic to the website is direct (53%); indicating visitors have bookmarked the website or typed in the website address from memory. Links from other websites (referrals) account for 29% of traffic and search engine traffic comprises the remainder of the traffic to the website (18%), see Figure 51.

In the first year of use of the tool, the data usage data was used to reorganize sub-pages on the website to highlight the pages most often used.

Figure 51 Website traffic sources. September 2010 to March 2013



Research process for website review

Using administrator access, I downloaded the contact database. The database was compared to member data collected by CES National and shared with the Chapter. Duplicate entries, out of date information, and duplicate fields were identified and shared with the current volunteer webmaster.

Events details are not available in a downloadable database. I therefore collected data from individual events to build a separate database in MS Excel. Once compiled, this information was analysed separately from the contact database.

Google Analytics was applied to the website September 9, 2010. Use of the website was summarized using the data provided by Google Analytics, specifically the bounce rate, visit duration, and new vs. returning visitors. Google defines these measures as follows:

- Whether they're coming back for more. Offer updated content based on how many new vs. returning visitors you see coming to your site.
- How long they stick around. Keep an eye on visit duration to know how long visitors stay on your site.
- How often they hit the Back button. Your bounce rate shows you how many people click the Back button on your site. Aim for lower bounce rates on your most important pages.

The online tool was then used to collect and report on usage data for the <http://bc.evaluationcanada.ca/> website.

CESBCY Volunteer Chapter Executive Consultations

Current and past members of the CESBCY Executive, including members of the 2010 CES National Conference co-chairs³⁵, were asked to comment on most of the review questions on the context within which the expanded Chapter operates, indications of success, and the utility of the SMP itself.

Has the environment changed?

These volunteer members identified environmental similarities and differences in British Columbia and the Yukon. They noted that in each jurisdiction evaluative work influenced by federal evaluation policy was ongoing. Although not as significant as work undertaken in Ottawa and its environs, federal programs in each jurisdiction, joint federal and territorial/provincial initiatives, and nonprofit organizations funded by the federal government are all bound to federal evaluation policy and subject to evaluations. These evaluations, some noted, may be undertaken by locally based evaluators or by evaluators based in Ottawa with more significant experience conducting 'federal style' of evaluation. Full time evaluation work is rare in BC and more so in the Yukon. The Executive speculated that few organizations have full time

³⁵ This collection of twenty-three people is referred to collectively as volunteer members, the executive, executive members, or Volunteer Chapter Executive regardless of whether they are currently volunteering or a past volunteer.

internal evaluators. Limited local capacity to undertake and complete a quality evaluation is supplemented by evaluation professionals from outside the jurisdictions.

Federally led evaluations have not always been a positive experience within the territory or province. The Executive commented on the lack of an evaluation policy in either the BC government or the Yukon government for their respective policies, programs, and projects. Operating without an evaluation policy in place, these volunteers noted that federal evaluation requirements have been viewed (with a few notable exceptions) as an external imposition – ‘a stick’ – and not as a positive opportunity for program improvement or internal learning within the provincial/territorial governments or the respective communities. They similarly noted that the capacity to plan for an evaluation, to hire an external evaluator or undertake an evaluation internally, and to identify the characteristics of a good evaluation versus a poor evaluation were limited in government and many of the communities they serve.

Executive members distinguished between the province and territory in their expectations for changes in policy or evaluation practices. There was consensus that evaluation remains limited in British Columbia. Members of the Executive commented on the negative influence the BC government has had on evaluation over the past ten years. Evaluation within the provincial government exists in pockets and has some internal allies, but is generally perceived negatively. In part, this followed the use of evaluations as tools to justify unwelcome program changes, and in part this followed significant expenditures for evaluations that were done poorly or provided little value to the program in question. Executive members referenced contacts within the provincial government who needed a proactive guide to finding and managing qualified external evaluators.³⁶ Importantly, some noted that the BC government rarely uses the word ‘evaluation’, but instead identifies with ‘evidenced-based decision-making’.

The current Yukon government has ‘made positive noises’ about evaluation. Volunteer Chapter Executives noted efforts within the Yukon Public Service Commission (PSC) to investigate the benefits of evaluation, to provide training for Yukon officials, and to address the long term challenge of organizational change to include evaluation. Executives identified this work as a positive change in the recent environment in the Yukon.

The context for these positive efforts is important for understanding evaluation in the Yukon. The prior Yukon government, volunteer members noted, implemented an *Accountability Act*. This *Act*, with its use of strategic planning and performance indicators was implemented with significant upheaval and re-organization: it was immediately repealed as the first action of the current government. Accountability now has negative connotations in the Territory.

³⁶ Appendix 9: Getting Started: Communications, Section 4 of the SMP includes five desired promotional materials: A membership brochure, templates for brochures for regular professional development products and for non-standard events and courses, a one-page brief (elevator pitch) on introduction to evaluation, and standard shareable presentations to introduce evaluation and the Society that members and allies could draw upon.

Do the five goals continue to resonate with and across the membership? Are any changes to these goals sought by the membership?

Volunteer members were not consistent when commenting on the five existing goals for the Chapter. While none wanted changes made to the goals, they differed on whether the goals were 'great' and relevant for the Chapter, or were 'passive artefacts' of prior planning and not a conscious part of current thinking. There were suggestions that the Chapter should review and report on these goals annually in a more formal fashion to better inform and engage the membership and to ensure that goals and practices of the Executive were what the membership needs and wants.

Which activities has the Chapter undertaken? What successes have been achieved since 2008? How do we (CESBCY) know we're successful?

Consulted Executive members were very positive about the work undertaken since the adoption of the SMP. They highlighted the large number of successful lunch time events, the new website and social media presence, full day workshops, the ongoing popularity of the Essential Skills Series, communication between members, the expansion of the Executive itself to include the communications/marketing lead, the integration of the CE program into the Chapter's efforts (i.e. specific in-person events to assist members in completing their applications, identifying which of the Core Competencies are addressed by specific learning events), and perhaps the most significant effort, the successful hosting of the CES National Conference in 2010. The Executive members highlighted the outcomes of the activities undertaken as an improved the profile of CESBCY as an active organization in an energetic field, and the development a community of practice.

The significant efforts of the local area coordinators and the volunteers involved in the 2010 Conference organization were highly praised. Volunteer members noted the drain put of the volunteer core (Executive members and event-specific volunteers) after the 2010 Conference. The need for ongoing recognition and thanks of volunteers was highlighted among these respondents.

Past and present Executive members reported different experiences with recognition and reward. Some volunteer members reported feeling very appreciated, while others offered that they'd been thanked very few times. Related to the issue of recognition, a volunteer noted that new ideas and initiatives were frustrated by the slow pace of volunteerism and by negative feedback from fellow volunteers, thereby frustrating rather than rewarding volunteers' efforts. When advised of this finding while reviewing the draft of this report, Executive members proactively contacted me as the researcher to seek clarification and speak kindly of their fellow volunteers.

What barriers has the Chapter faced? Were / how were these overcome?

On a related note, the loss of one long time volunteer and upcoming ends of term for others led one volunteer member to raise succession planning as a pending challenge. Other challenges identified by

the volunteer Executive included the difficulty matching volunteer capacity (most notably time) with the effort required to achieve Chapter goals, and with engaging new volunteers to come forward.

The Executive noted that providing significant professional development and other benefits to non-volunteering members outside the Lower Mainland and Vancouver Island was a challenge. The part-time nature of many people involved in evaluation in BC and the Yukon, and their limited professional affiliation to the field was identified as challenges to the growth of evaluation in general and a challenge to the CESBCY on how to support these evaluators. Similarly, providing benefits that would expand the CES membership to include interested non-members (particularly event attendees) was identified.

Asked to identify past or potential strategies to address these challenges and advance the Chapter's goals, volunteer member had a number of ideas. They suggested ongoing proactive support for the CE designation and its related training supports to expand the local benefits of membership, group liability or other insurance benefits to support the wide array of consulting evaluators, and better coordination with CES National to determine the amount of uptake on webinars and other non-geographic specific supports to more remote Chapter contacts. Volunteer members also noted that the disparate nature of the membership and of the volunteers naturally led to a need for proactive, and cost-free, communication. Teleconference capacity for volunteer coordination was highlighted as an important key to ongoing consistency in volunteer efforts. More frequent communication (email, social media, and updated news items) were similarly highlighted as a means to engage the membership.

The Executive acknowledged that there has been very limited progress in advocating for an evaluation policy. Very different ideas were suggested in relation to advocacy within the BC and Yukon governments. Some volunteer members wondered if it were reasonable for the Chapter to target such a significant policy change with the existing number of volunteers and the available volunteer capacity. Given the respective positions of the Yukon versus British Columbia governments approach to evaluation, the question was asked whether advocacy and policy develop efforts should be focused on the Yukon at this stage. Volunteer members in the Yukon or with professional ties to the Yukon noted that the efforts within the Territorial Government in relation to evaluation were still in very early stages and may warrant close monitoring, but not yet proactive pursuit.

Volunteer members noted that the Territorial budgeted is expected to shrink (fewer funds transferred from Ottawa) and the current BC government is expected to fall in the May 2013 provincial election. In each jurisdiction, members identified these changes as potential opportunities for carefully planned and delicately implemented advocacy work. Advocacy efforts, Executive members noted, need to be focused differently in each jurisdiction, but be mutually aware.

In the Yukon, supporting the existing efforts of the PSC to identify benefits of evaluation and provide ongoing training opportunities were prioritizes for Executive members. The Chapter was cautioned by its volunteer members against 'rushing in' but rather providing 'touch-base' support for the current internal efforts. A recent experience was highlighted, wherein a team of people, including an evaluator from one

of the provincial governments met with their Yukon counterparts. This allowed those in the Territorial to gain an understanding of how and why evaluation was used in government outside the federal model.

Should the Chapter advocate to governments, a recommendation was made for an advocacy team made up of academics, practicing internal and external evaluators, and evaluation users. This team could then approach decision-makers (within the BC government, immediately following the next election). It was suggested that evaluation focused on internal learning and program improvement linked to the policy cycle be promoted to these decision-makers. Specific suggestions included using examples of quality evaluations that benefited policy and program managers, a briefing on the CE program as a filter for identifying qualified suppliers, as well as quality control tools and checklists that are available for those new to evaluation. They emphasized that using the existing nomenclature i.e. 'evidenced-based decision-making' would be essential in any discussions or advocacy to the BC government. Avoiding the use of the term 'accountability', but focussing on the learning and program improvement aspects of evaluation uses were similarly suggested.

Is the SMP a useful tool for Chapter management and planning? Are the performance measures being used?

As a first step in determining the usefulness of the SMP, current and past members of the CESBCY Executive were asked whether they had read the document and whether they used it in an ongoing manner. The answers covered the spectrum. Two had never read the SMP, while another had read it often and maintained a hard copy for near ongoing reference. Most responding members of the Executive have read the SMP, with some reading specific sections, as the need arose. At the same time, even those who had read the SMP were not aware of and/or not using the performance indicators included in Section 5 of the SMP.

In further discussions of performance indicators, volunteer Executive members suggested the metrics that they personally use to gauge the relative success of the Chapter, namely: event attendance, number of CES members, number of others reached through the mailing list, the number and quality of events held, the attendance at the CESBCY Annual General Meeting, and number of CES members in the Chapter who are Credentialed Evaluators. There was a desire to know how many Chapter contacts (full CES members and mailing list participants) were taking advantage of the CES National webinar series. Executive members highlighted the need to publicly report on these metrics at least annually.

Research process for consultations with past and present Volunteer Chapter Executive

Consultations with current and past members of the Volunteer Chapter Executive, including the 2010 CES National Conference co-chairs addressed all the evaluation questions, save one related to the literature review.

The planned data collection method was to be telephone or in-person conversations. This data collection method was amended to include email-based consultations to accommodate the needs of the

respondents and my own move out of province. Initial discussions took place in 2011 and consultations were finalized in February and March of 2013.

Three emails were sent to each person who had volunteered their time in 2007 and since as a member of the Executive and/or Conference Co-Chairs (n=23 people). The first was an (re)introduction to the project sent by the Chapter Secretary. This email included the project scope, an update of data collection processes to date and expected stages to completion of the project, as well as an expectation of confidentiality. The second email included questions to the current Executive, and a slightly amended version of the same questions to those who were no longer volunteering. The third email to all recipients was a reminder email to those who had not yet responded. As individuals responded with specific comments or questions, I corresponded with those people directly via telephone or email.

Of the 23 people who have volunteered as part of the Executive since 2007, two were unreachable through email. In total eight sets of responses were received. Given the relatively small number of respondents in these consultations, data is provided in aggregate without further delineation. The analysis of their responses and ideas has been grouped collectively to limit the likelihood of identifying particular respondents. This limited response included some well thought out and thorough comments, however it cannot be considered representative of the whole of the Executive. More substantive discussions within the current Executive may be of significant benefit as the Chapter moves ahead with the development of a subsequent Strategic Plan for 2014-2019.

2011 Member survey (including comparison to 2007 survey)

An online survey of all Chapter contacts (including CES members and members of the Chapter's mailing list) was implemented to address the evaluation questions: Has the environment changed? Do the five goals continue to resonate with and across the membership? Are any changes to these goals sought by the membership? What successes have been achieved by the Chapter since 2008? How do we know we were successful?

Questions for the 2011 survey were developed in consultation with the evaluation steering committee. Where feasible the 2011 questionnaire includes the same questions as those used in the 2007 Chapter member survey, thereby allowing for comparison in the analysis in demographics, priorities, and experiences with the Chapter over time. The questionnaires for both the 2011 and the 2007 surveys are included in the 'Research process for Member survey' below.

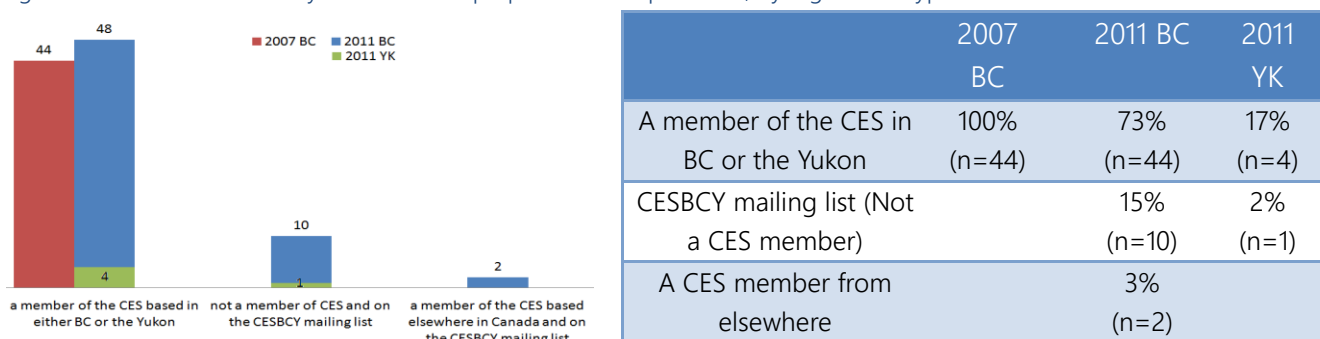
Has the environment changed?

In membership survey this question is twofold. First is the need to understand the members' assessment of evaluation in the Yukon, as the Yukon was not included in the 2007 needs assessment survey or development of the SMP. Second is the members' re-assessment of evaluation in British Columbia. The

survey is one tool to determine members' understanding of their professional environment and whether it is consistent across jurisdictions.

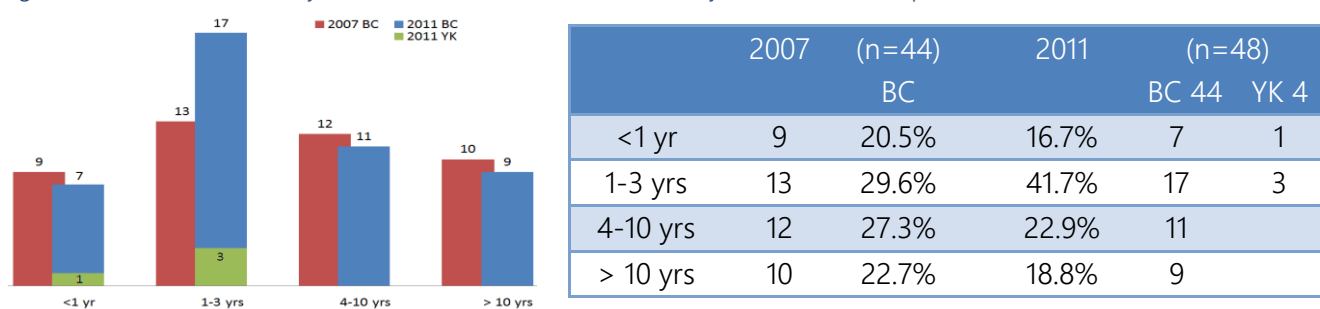
The number of responses to the Chapter's 2011 survey and garnered 60 responses, including 5 from the Yukon, from a potential 382 members of the Chapter contact list. Looking at the demographics of the survey respondents in the 2001 and 2007 surveys, the responding groups are similar in many ways. Figure 52 shows similar numbers of response rate from CES members in the Chapter. Eighty percent of respondents (n=48) were CES members in the Chapter (including 4 from the Yukon). Twelve other respondents completed the 2011 survey. These members of the wider evaluation community were on the Chapter's mailing, two of which were CES members from outside the Chapter and the remaining ten of are not CES members at all (including one from the Yukon).

Figure 52 2007 & 2001 Surveys: number and proportion of respondents, by region and type



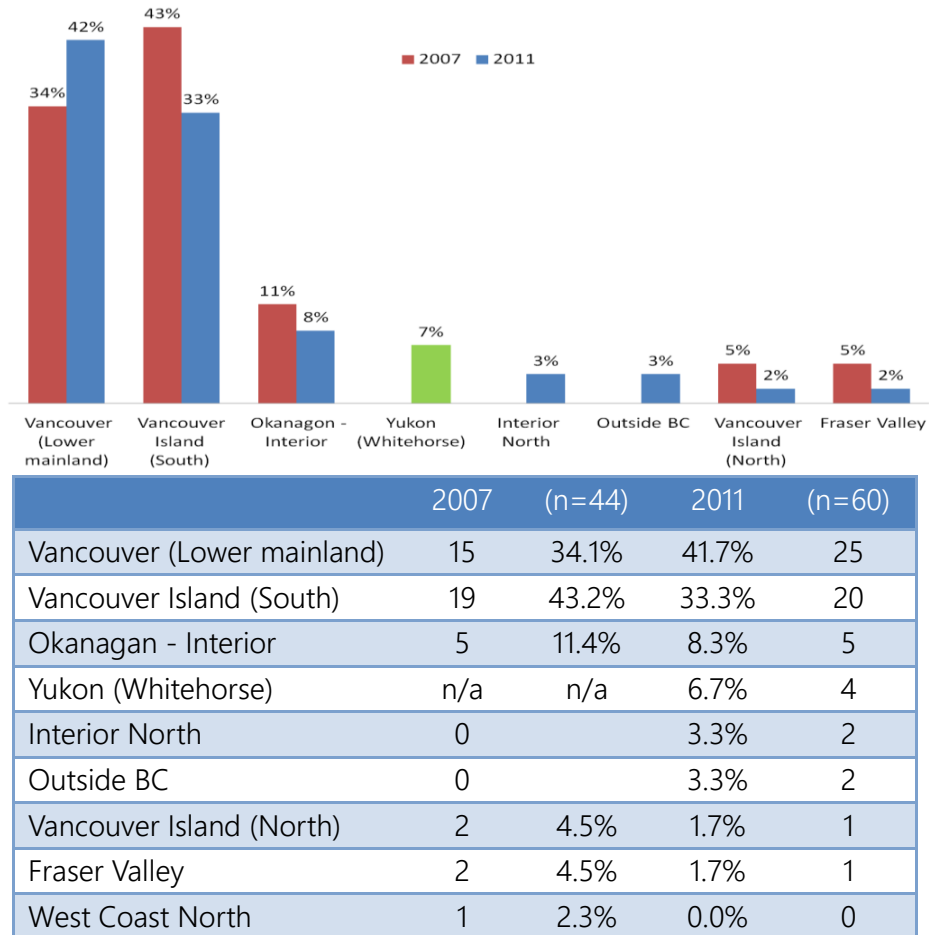
For CES members alone, respondents were asked for how long they had been a member. When compared to those from the 2007 survey, respondents to the 2011 survey were similarly distributed with an increased number of respondents who'd been members between one and three years (Figure 53). This may indicate a slightly better retention rate of new members since the SMP came into force.

Figure 53 2007 & 2001 Surveys: CES members in BC and the Yukon, years of membership



Comparing the location of respondents from the 2007 to the 2011 survey, we can see that the respondents generally reflect the general distribution of the Chapter membership, with more responses originating in the Lower Mainland and the South Island. The 2011 survey includes 5 members from the Yukon, (Figure 54).

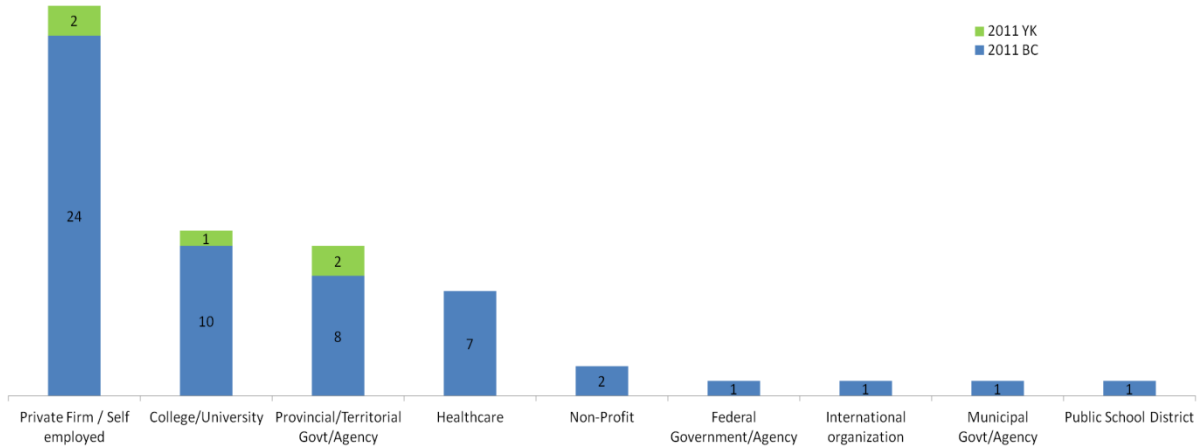
Figure 54 2007 & 2011 Surveys: respondents' location



West Kootenays and *Other (please specify)* were also options in the 2007 and 2011 surveys. *Yukon – outside Whitehorse* was included in the 2011 survey. No respondents were selected these options in either survey.

Respondents to the 2011 survey come from many areas within the industry. Many of the respondents (n=26) work in private consulting firms. Slight more (n=28) work in a public sector organization (College or university, Provincial or Territorial government, Health Care agency). The remainder of the respondents had an array of employers. Figure 55 includes a breakdown of responses by each identified employer type.

Figure 55 2011 Survey: Respondents employer type

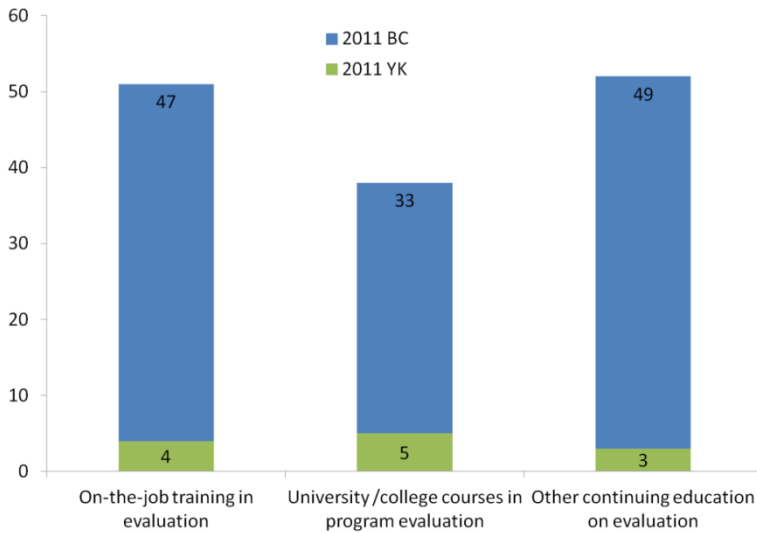


Employer type	2011 (n=60)	
Private Firm / Self employed	43%	24 2
College/University	18%	10 1
Provincial/Territorial Govt/Agency	17%	8 2
Healthcare	12%	7
Nonprofit	3%	2
Federal Government/Agency	2%	1
International organization	2%	1
Municipal Govt/Agency	2%	1
Public School District	2%	1

Some respondents delineated between sole proprietorships (self-employed) and larger firms, whole others did not. For the purposes of this analysis, it is appropriate to group all private sector respondents together

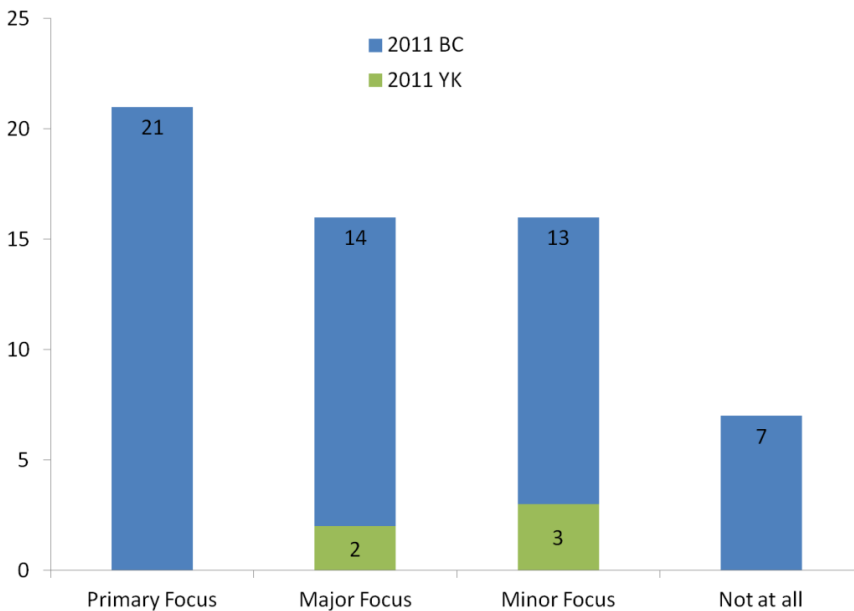
The majority of respondents to the 2011 survey have received specific training on evaluation. Two thirds of respondents have completed a university or college level course on evaluation, and an even greater proportion received on-the-job training (85%) or another form of continuing education courses or workshops on evaluation (Figure 56).

Figure 56 2011 Survey: respondents with evaluation specific training (n=60)



The 2007 SMP reported that many working in or using evaluation in the Chapter were doing so as a part-time effort. The 2011 survey indicates that this continues to be the case in British Columbia, as well as in the Yukon. Of the 60 respondents, 27 described their current professional involvement in program evaluation as minor or none at all. Figure 57 describes the distribution of respondents' involvement in evaluation.

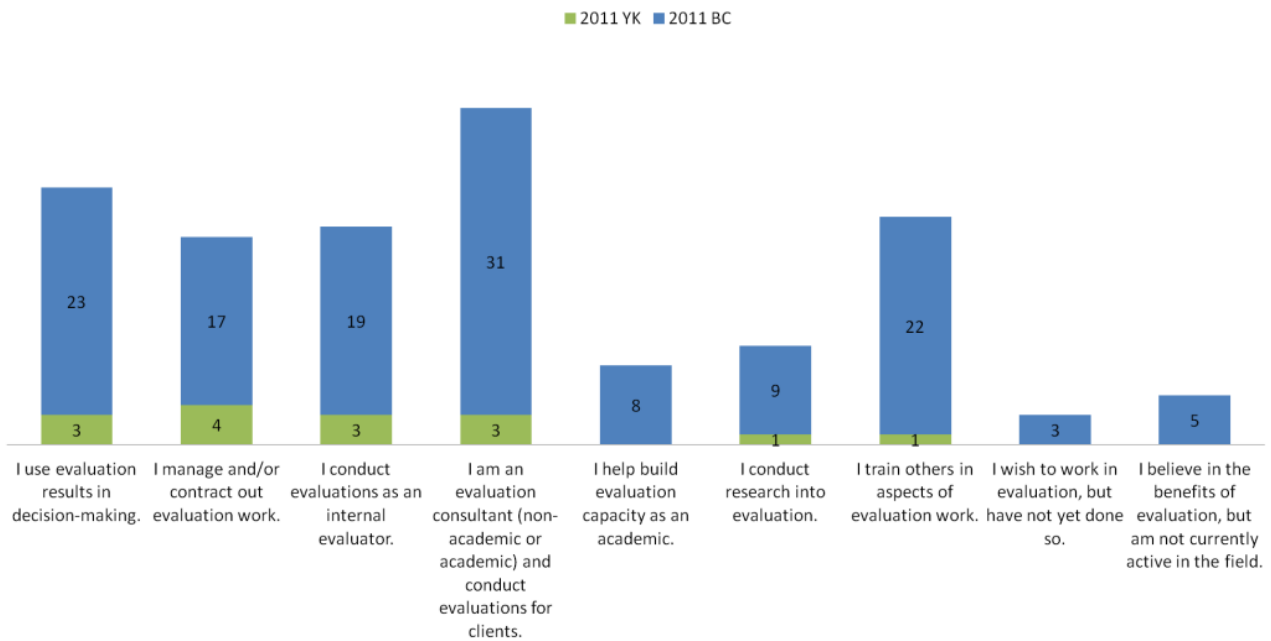
Figure 57 2011 Survey: degree of involvement in evaluation (n=60)



Responses from the 2011 survey indicate that those in both the Yukon and BC use evaluations in a breadth of ways. More than half of respondents are evaluation consultants (n=34) and just over a third of

respondents are internal evaluators (n=22). Nearly half (n=26) use evaluation results in decision making. Training others in aspects of evaluation and managing/contracting evaluations were also frequently cited by respondents as ways in which they used evaluations. A full breakdown of the ways in which respondents use evaluation is included in Figure 58.

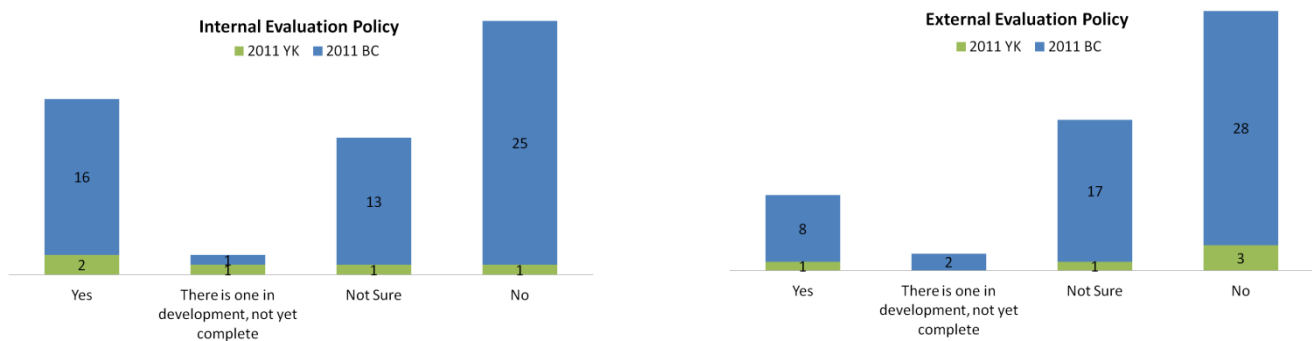
Figure 58 2011 Survey: ways respondents use evaluation (n=60)



Figures do not sum to 58, as respondents were able to select multiple answers.

One issue identified in 2007 and in preparatory discussion for the 2011 survey was the question of whether or not organizations had formal evaluation policies in place. Most often, respondents did not have, or were not aware of, either an internal or external evaluation policy. Figure 59 includes two tables displaying whether or not respondents' organizations internal or external evaluation policy.

Figure 59 2011 Survey: prevalence of Internal or External evaluation policies



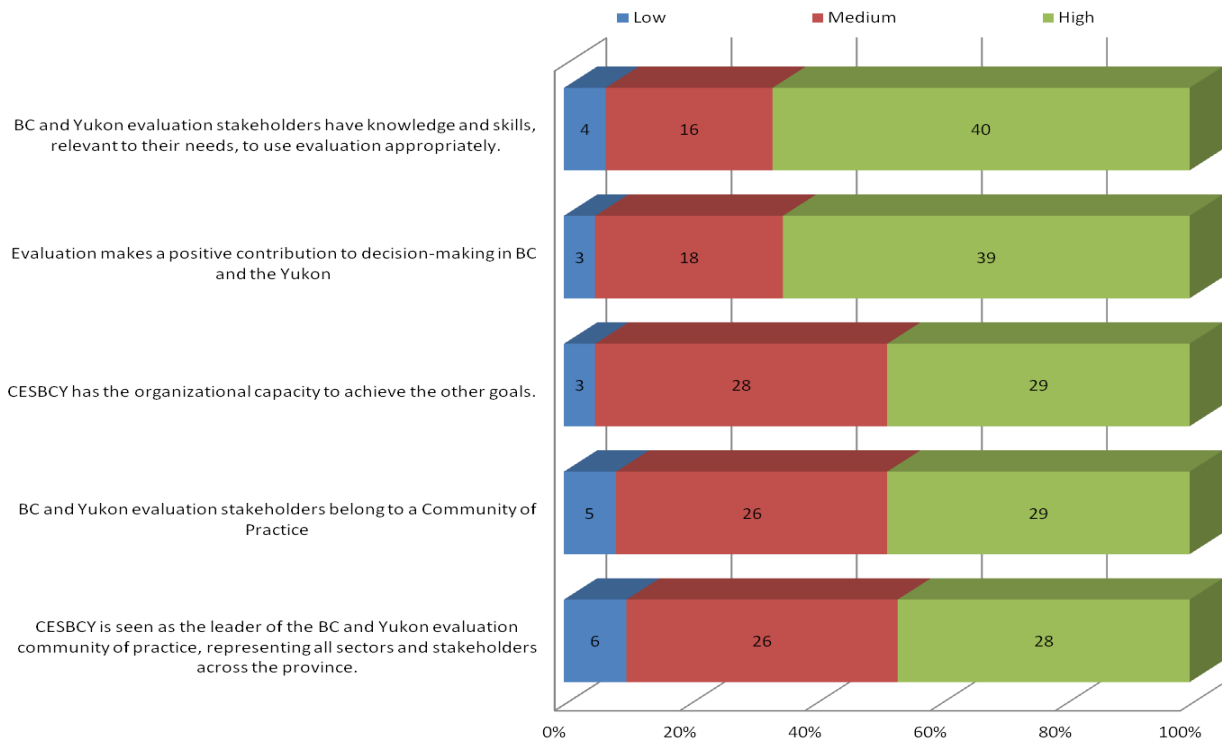
Do the five goals continue to resonate with and across the membership? Are any changes to these goals sought by the membership?

The five goals are:

- BC and Yukon evaluation stakeholders belong to a Community of Practice.
- BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.
- CESBCY has the organizational capacity to achieve the other goals.
- CESBCY is seen as the leader of the BC and Yukon evaluation community of practice, representing all sectors and stakeholders across the province.
- Evaluation makes a positive contribution to decision-making in BC and the Yukon.

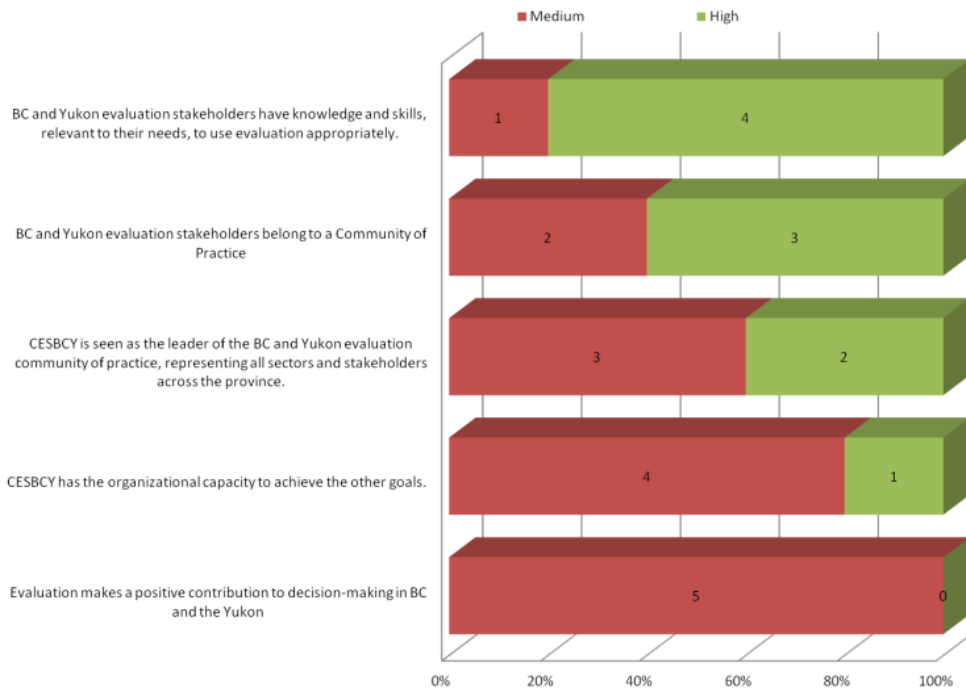
Respondents were asked to rate the importance of each goal, from low to high of the existing five goals within the 2008-2013 Strategic and Marketing Plan, specifically whether these goals continue to be important to the membership. Respondents were generally supportive of the existing goals, with only a small number rating one or more goals as a low priority (no more than 6 of the n=60 for any given goals). Respondents most frequently rated *BC and Yukon evaluation stakeholders belong to a Community of Practice* as high importance (n=40) A further 16 respondents found this goal to be of medium importance. *Evaluation makes a positive contribution to decision-making in BC and the Yukon* had nearly the same number of high importance ratings (n=39) and a fewer number of low importance ratings (n=3). Sorting the Chapter's goals by the number of 'high' importance rankings, then medium and lowest, the five goals can be prioritized across the respondents as shown in Figure 60.

Figure 60 2011 Survey: Importance of five goals for all respondents

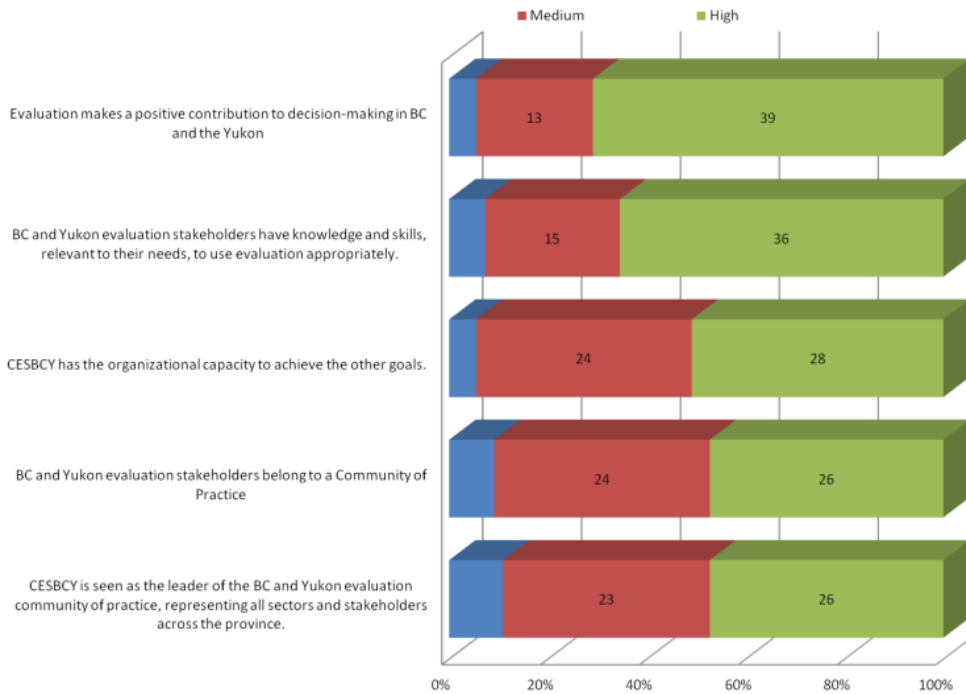


Interestingly, isolating Yukon-based respondents from the remainder of the respondents shows differences in priorities. The most notable difference being the respective ranking of the Chapter’s goal *Evaluation makes a positive contribution to decision-making in BC and the Yukon* – highest ranked by respondents outside the Yukon, lowest ranked by those in the Yukon. A comparison is available in Figure 61.

Figure 61 2011 Survey: Importance of five goals. Yukon vs. other respondents
Yukon-based respondents



Respondents outside Yukon



When asked for other issues or priorities the Chapter should focus on ten respondents offered the following overlapping suggestions:³⁷

- The Chapter should operate in a more cohesive manner, to “knit together the rural, remote and distant cities across two large geographic areas” (n=4). Respondents noted that the separation of the Chapter into smaller, local areas served to isolate members from each other and produce significant disparity in the availability of services and networking opportunities. This is particularly true outside southern Vancouver Island and the Lower Mainland. Suggestions on how do this included:
 - dispense with separate local coordination groups
 - provide teleconference or webinar tools for volunteers to plan events collectively
 - offer professional development remotely (webinars were mentioned three times)
 - rotate events throughout the Chapter
 - share presentations from in-person training with the whole of the membership
 - other online ways of communicating and receiving benefits from CES
- Communicate more openly and more frequently with non-volunteering members (n=3). This recommendation was made to address different issues.
 - Respondents called for increased transparency from the Chapter, allow members to ‘listen in’ to Executive meetings.
 - Increased transparency demonstrates the value of membership in the CES. “Members want to know that being a part of the CES BC is worthwhile.”
 - Increased frequency and promotion of the existing efforts by the Chapter may increase awareness of the Chapter, the Society and the profession.
 - Non-volunteering members, particularly those working part-time in evaluation make up a large number of CESBCY’s membership. One such respondent noted that “I just don’t have the time to be involved, unfortunately. I don’t feel like a peer with other members and it feels a little like a club. I don’t know how to fit in because I really am on the margin of the practice.”
- “Mentoring” (n=2).
- Offer events/services based on a regular needs assessment (training/education, networking, mentorship opportunities) (n=2). “Especially with the credential process, I think that the evaluation education and updating of skills requires a stronger focus that has been shown in the past.”
- Promote credentialing (n=2). CESBCY should be an active promoter of the importance of credentialing, and reaching out to decision-makers to ensure they are aware that the designation exists.

³⁷ The ten of the 60 respondents (48 members) who authored these suggestions were from Okanagan – Interior, Vancouver (Lower mainland), and Vancouver Island (South). This small number of responses cannot be considered representative of the whole of the Chapter. Nonetheless, the ideas themselves can be considered on their own merit by the Chapter as it plans for the future.

- Retain existing members, recruit new members, recruit members to volunteer (n=2).“... we need to encourage, support, and reward”

What successes have been achieved by the Chapter since 2008?

One objective of the 2008-2013 SMP to ‘ensure that CES professional designations are relevant and accessible to CESBC members’ (de Cordova & Vojakovic, Canadian Evaluation Society - British Columbia Chapter (CESBC) Strategic and Marketing Plan 2008-2012, 2008, p. 5). In 2007, the Chapter asked its members whether they supported the idea of a professional designation, and if so, what characteristics it should take. At that time, the Chapter found the majority of respondents wanted to see some form of designation, with some respondents’ support dependent upon the form of implementation. The same survey showed that half of Chapter members preferred professional credentialing and over forty percent supporting a requirement for CES membership. Figure 62 displays the related results for these questions.

Figure 62 2007 Survey: support for professional designation and preferred characteristics

Support for professional designation for evaluators		Preferred form of professional designation	
Definitely not	2.3%	membership required in CES	42.5%
Perhaps	22.7%	credentialing (based on training and experience)	50.0%
Yes, depending on how implemented	36.4%	certification (based on examination process)	27.5%
Definitely yes	29.6%	all of the above	32.5%
None of the above	9.1%	Other (please specify)	27.5%

In 2009, CES National announced that the Society was going ahead with professional designation as a credentialing system, based on training and experience, with a requirement for membership in the Society.

Following on this, the 2011 survey included questions as to whether or not respondents had considered applying to be a Credentialed Evaluator (CE) through the Canadian Evaluation Society, and if so, whether or not they had begun the application process. Over 70% of CES members in BC and the Yukon had considered applying for the CE in 2011 (30 of the 39 CES members in BC and all 4 of the CES members in the Yukon). Five other non-members (including the one non-member from the Yukon) also indicated they had considered becoming a CE. Of those 35 respondents considering an application, eight BC-based CES members confirmed that they had initiated the process for receiving their designation. Figures 63 and 64 have the breakdown of the related survey responses.

Figure 63 2011 Survey: considered applying to be a Credentialed Evaluator (n=60)

	No	Yes	Total
a member of the CES based in either BC or the Yukon	14	34	48
not a member of CES and on the CESBCY mailing list	6	4	10

a member of the CES based elsewhere in Canada and on the CESBCY mailing list	1	1	2
Total	21	39	60

Figure 64 2011 Survey: begun the CE application process (n=38)

	No	Yes	Total
a member of the CES based in either BC or the Yukon	25	8	33
not a member of CES and on the CESBCY mailing list	4		4
a member of the CES based elsewhere in Canada and on the CESBCY mailing list	1		1
Total	30	8	38

Benefits of membership

In 2007, the Chapter asked respondents to select the benefits that they received from being a member of the Chapter at that time and what they hoped for in the future. These same questions were asked of respondents to the 2011 Chapter survey. In each case, respondents were asked to rate eight potential benefits of CES membership on a three point scale: minimal – somewhat – considerable. Overall, the survey respondents from the 2011 survey were less enthusiastic about the suggested benefits than the 2007 counterparts.

Going forward, 2011 survey respondents were most likely to find ‘professional credibility’, and ‘awareness of contracting and employment opportunities’ to be somewhat of a benefit of membership. This was somewhat similar to the 2007 respondents’ ratings.

‘Networking with colleagues who share professional interests’ showed a greater degree of disparity. Whereas 2007 respondents were most likely to find this a considerable benefit of membership in the future, 2011 respondents found this to be a minimal benefit.

For both the 2007 and 2011 surveys ‘opportunities to collaborate on projects’ and ‘mentoring opportunities’ were relatively unimportant benefits of CES membership.

In 2007, survey respondents were most like to find three potential benefits as ‘considerable’ benefits to CES membership for the then current time frame and future:

- Access to professional development and training opportunities
- Understanding of current practices and the state of research for evaluation in Canada
- Affiliation with a professional association

In each instance, 2011 respondents found these to be somewhat or minimally beneficial.

Figure 65 shows the rating provided by respondents for each proposed benefit by year and for current or future years. The most frequent responses are highlighted.

Figure 65 2007 & 2011 Surveys: rated benefits of CES membership

			2007	2007	2011	2011
			current	future	current	future
Access to professional development and training opportunities	considerable	#	21	30	13	2
		%	50.0%	69.8%	27.1%	4.2%
	somewhat	#	19	9	27	26
	%	45.2%	21%	56.3%	54.2%	
	minimal	#	2	4	8	20
	%	4.8%	9.3%	16.7%	41.7%	
Understanding of current practices and the state of research for evaluation in Canada	considerable	#	19	27	9	1
		%	44.2%	62.8%	18.8%	2.1%
	somewhat	#	12	15	26	25
	%	27.9%	35%	54.2%	52.1%	
	minimal	#	12	1	13	22
	%	27.9%	2.3%	27.1%	45.8%	
Affiliation with a professional association	considerable	#	21	24	8	4
		%	50.0%	55.8%	16.7%	8.3%
	somewhat	#	18	16	15	21
	%	42.9%	37%	31.3%	43.8%	
	minimal	#	3	3	25	23
	%	7.1%	7.0%	52.1%	47.9%	
Professional credibility	considerable	#	9	19	5	5
		%	22.5%	44.2%	10.4%	10.4%
	somewhat	#	20	20	26	20
	%	50.0%	47%	54.2%	41.7%	
	minimal	#	11	4	17	23
	%	27.5%	9.3%	35.4%	47.9%	

			2007	2007	2011	2011
			current	future	current	future
Awareness of contracting and employment opportunities	considerable	#	12	20	7	7
		%	28.6%	46.5%	14.6%	14.6%
	somewhat	#	16	13	24	23
		%	38.1%	30%	50.0%	47.9%
	minimal	#	14	10	17	18
		%	33.3%	23.3%	35.4%	37.5%

Networking with colleagues who share professional interests	considerable	#	13	23	15	6
		%	31.7%	54.8%	31.3%	12.5%
	somewhat	#	18	17	18	20
		%	43.9%	41%	37.5%	41.7%
	minimal	#	10	2	15	22
		%	24.4%	4.8%	31.3%	45.8%

Opportunities to collaborate on projects	considerable	#	2	13	4	12
		%	5.3%	30.2%	8.3%	25.0%
	somewhat	#	7	15	9	12
		%	18.4%	34.9%	18.8%	25.0%
	minimal	#	29	15	35	24
		%	76.3%	34.9%	72.9%	50.0%

Mentoring opportunities	considerable	#	1	11	1	14
		%	2.6%	25.6%	2.1%	29.2%
	somewhat	#	8	22	13	16
		%	21.1%	51%	27.1%	33.3%
	minimal	#	29	10	34	18
		%	76.3%	23.3%	70.8%	37.5%

How do we know we were successful?

The 2011 survey asked respondents to rate the nineteen objectives from the SMP using 'Not Successful', 'Successful', and 'Exceeded Expectations' as well as 'Cannot Comment'. While recognizing that surveyed respondents may not have all the information available to determine relative success of the objectives, the Chapter was interested to know what the relative perception of success was across its contacts.

Respondents rated the Chapter most successful in continuing to offer standard CES training (44 of 49 commenting respondents rated the Chapter 'Successful', and 'Exceeded Expectations'), and in CESBCY

members who wish to do so, can find and contact each other (rated 'Successful' by 36 respondents and 'Exceeded Expectations' by one, n=42).

The Chapter was rated to be least successful in its objective for BC to have appropriate provincial policies on evaluation (18 of 19 commenting respondents rated the Chapter 'Not Successful'), and to encourage and support junior evaluation stakeholders (14 respondents rated the Chapter 'Not Successful', while 9 rated it 'Successful'). A complete summary of respondents' ratings for the objectives of the SMP is included in Figure 66.

Respondents from the Yukon had comparatively different ratings for a number of the objection achievements. Yukon respondents all (n=5) rated the Chapter 'Successful' in developing a clear strategy for CESBCY and for continuing to offer standard CES training. A separate summary of Yukon respondents' ratings for the objectives of the SMP is included in Figure 67.

Figure 66 2011 Survey: Chapter's success in achieving SMP objectives, all respondents.

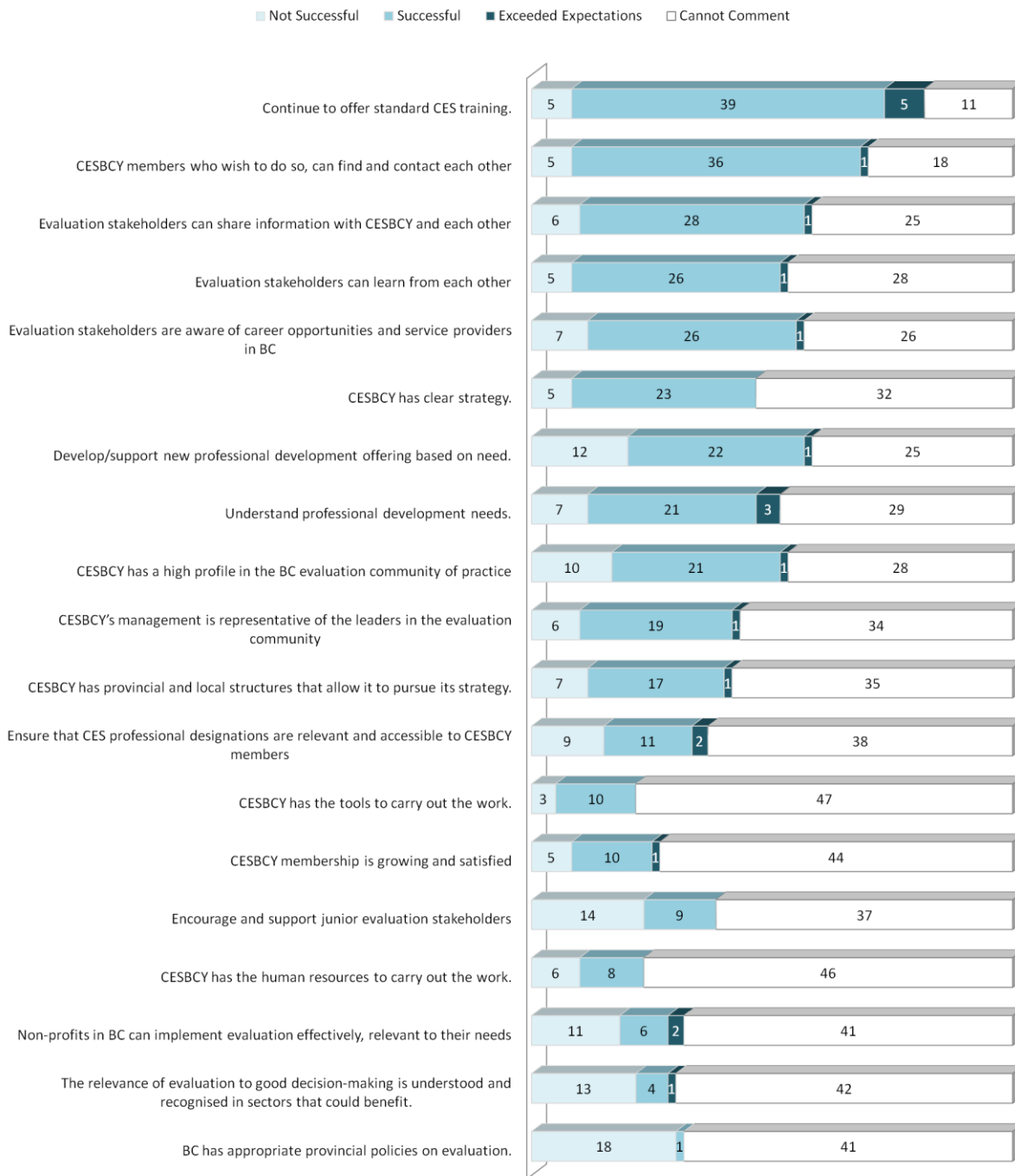
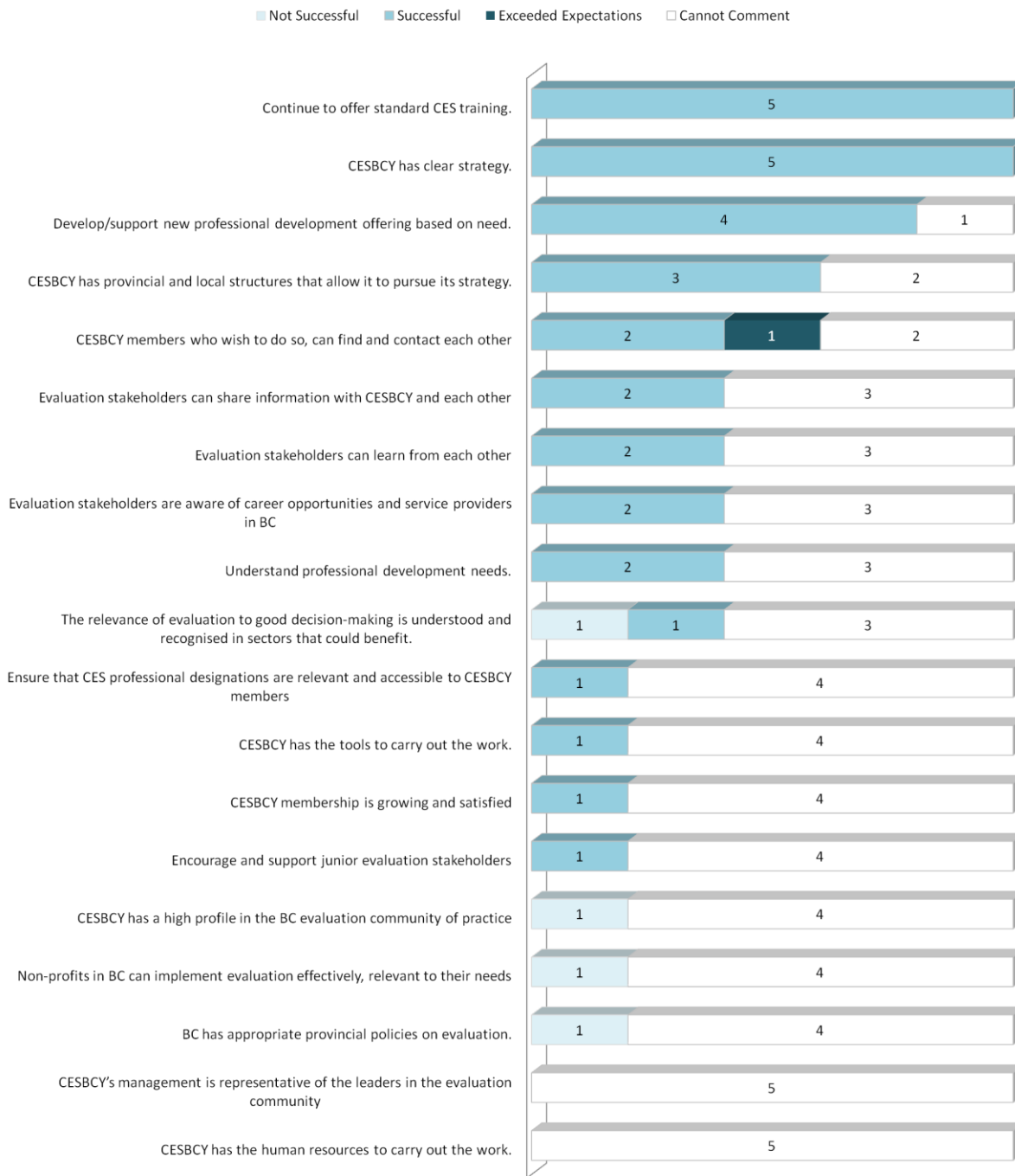


Figure 67 2011 Survey: Chapter's success in achieving SMP objectives, Yukon respondents.



Research process for member survey

An broadcast email was sent to all those in the Chapter contact list (n=382)³⁸ on September 9, 2011 This includes CES members in BCY, other CES members who had registered with the website to be kept abreast of events and news from the Chapter, and non-members who'd attended an event or registered with the website separately. An email reminder was sent out on September 26, 2011. The survey was live for four weeks, closing Friday, October 6, 2011. There were 60 completed surveys.³⁹ There were another 20 partially complete; these are not included in the analysis for the following reasons:

- The survey did not allow respondents to 'save' a partially completed set of responses. There is no way to know if the partial responses represent duplicates of later, completed surveys
- The fall off point (where individuals left the survey) was very early in the survey (primarily between questions 2 and 4), potentially indicating that respondents were not willing to participate.
- The early fall off rate did not provide useful data to analyze.

As noted in Figure 68, the response rate produced a confidence level of +/- 11.75, 95% of the time. The response rate was similar to the survey undertaken in 2007, which had a similar confidence lever +/- 12.37, 95% of the time.⁴⁰

Figure 68 Population size, response rate, and confidence levels

	2007	2011
respondents	44	60 48 CES members in BC and Yukon 2 CES members outside BC and Yukon 10 People on the mailing list
population	145 145 CES members in BC	382 179 CES members in BC and Yukon 4 CES members outside BC and Yukon 201 People on the mailing list
confidence intervals	95% (+/- 12.37)	95% (+/- 11.75) +/-12.29 CES members in BC and Yukon moot CES members outside BC and Yukon moot People on the mailing list
recommended sample size for statistical significance	106	192

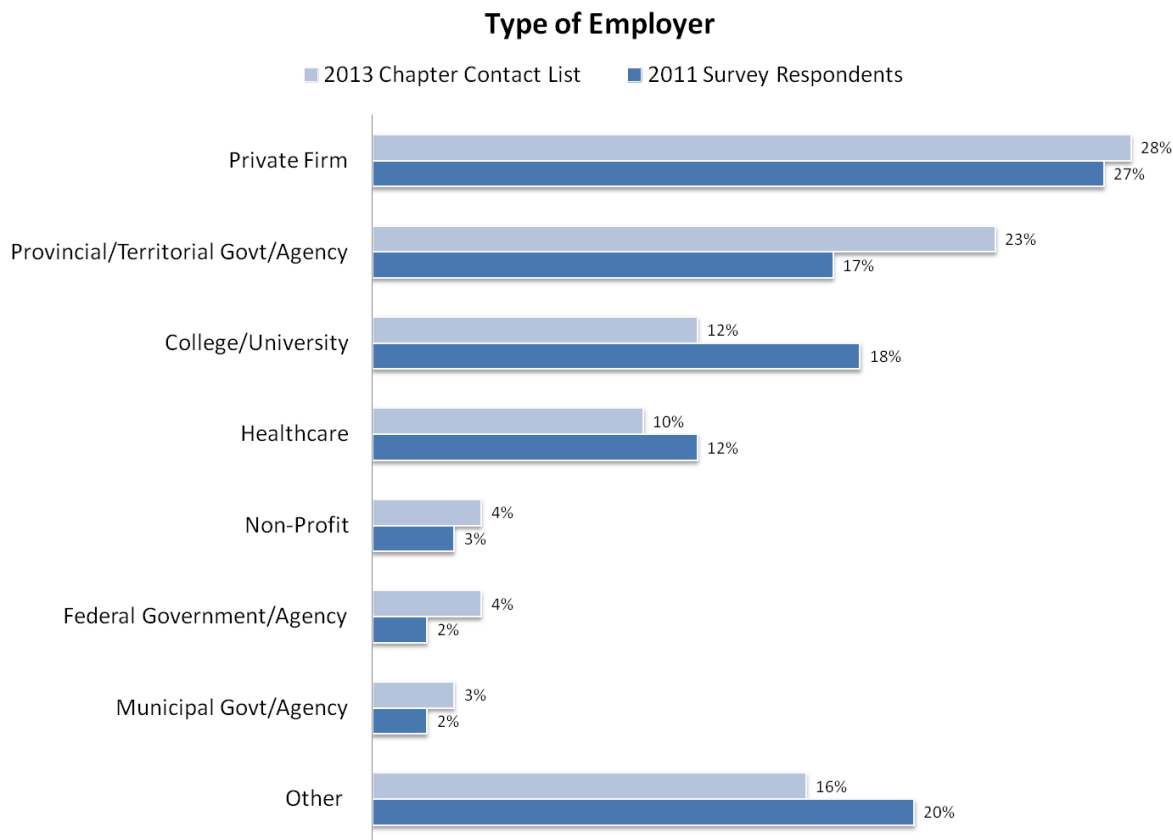
³⁸ A blog entry on the Chapter website indicated an 'n' of 410. This Figure included some duplicate emails for recipients and administrative contacts. A query of the email addresses related to completed surveys indicated that no recipient completed the survey twice. Once the duplicates were accounted for, the total number of potential survey recipients was lowered to 382. (<http://bc.evaluationcanada.ca/SMPeval?mode=PostView&bmi=697701#comments>)

³⁹ Early analysis and a blog entry on the Chapter website indicate 59 responses were received. A further respondent completed the survey as the initial data was being downloaded and was missed in these initial calculations. The calculations have been updated to include the responses from all 60 individuals. (<http://bc.evaluationcanada.ca/SMPeval?mode=PostView&bmi=723090>)

⁴⁰ Confidence intervals and the recommended sample size for statistical significance were calculated using the "Sample Size Calculator" from The Survey System at <http://www.surveysystem.com/sscalc.htm>.

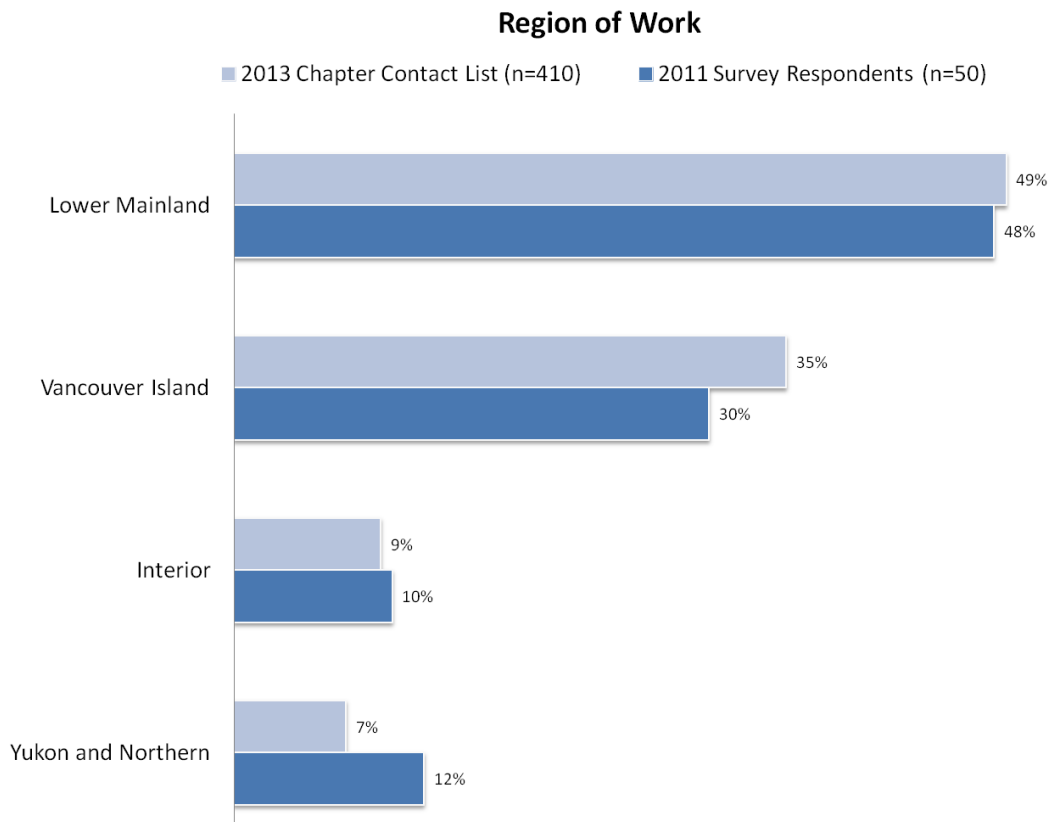
While not statistically significant, the 2011 survey respondents have a similar characteristics to the 2013 Chapter contacts. The types of employers for all respondents and the regions of work for respondents in BCY are similar to the 2013 Chapter contacts (see Figures 69 and 70).

Figure 69 2011 Survey & 2013 Contacts: compared employer type



	2011 Survey Respondents		2013 Chapter Contact List	
	Count	Percentage	Count	Percentage
Private Firm	16	27%	164	28%
Provincial/Territorial Govt/Agency	10	17%	139	23%
College/University	11	18%	71	12%
Healthcare	7	12%	61	10%
Nonprofit	2	3%	26	4%
Federal Government/Agency	1	2%	22	4%
Municipal Govt/Agency	1	2%	19	3%
Other	12	20%	93	16%
	60	100%	595	100%

Figure 70 2011 Survey & 2013 Contacts: compared region of work



	2011 Survey Respondents		2013 Chapter Contact List	
Interior	5	8%	38	9%
Lower Mainland	24	40%	200	49%
Vancouver Island	15	25%	143	35%
Yukon and Northern	6	10%	29	7%
Outside BCY	10	17%	1	0%
	60	100%	411	100%

An initial analysis of the survey data was completed in October of 2011. A brief presentation of frequencies and early analysis was prepared at that time and provided to the Chapter and the University. These results were made available online by the Chapter and can be found at <http://bc.evaluationcanada.ca/SMPEval?mode=PostView&bmi=723090> in presentation and pdf formats.

Additional analysis was completed at the end of the project, including the comparison of data to the 2007 survey undertaken by the Chapter of its then BC-only membership. Whenever possible variations between respondents in the two jurisdictions has been highlighted.

The 2011 Survey was hosted by SurveyGizmo. In addition to the questions asked, the online software collected information on the date submitted, whether or not surveys were abandoned, and city in which the survey was completed. This later information was used to supplement survey responses for six respondents in which the question 'What area of the province / territory do you live in?' was left blank. The location information was compared to the content of comment boxed, all of which confirmed that the location ascribed by the software was the one in which those respondents normally work. No other clarifications or adjustments were made to the data before analysis.

Questions from the 2011 and 2011 Surveys

Figure 71 2011 Survey questions

(★ = required)

Welcome

CESBCY has begun a review of our five year Strategic and Marketing Plan (2008-2012). The Chapter developed the SMP in 2007/2008. Since that time the Chapter has changed: our membership now includes CES members from both BC and the Yukon, we hosted a National Conference during difficult economic times in 2010 and our overall membership has increased. There are concurrent changes in the environment for evaluation, including changes in both federal and provincial policies and approaches to evaluation.

Tell me more about this survey

The review includes an environmental scan, document and literature reviews, interviews with past and present members of the Volunteer Chapter Executive and an anonymous survey of members and newsletter recipients. The review is being led by Lisa O'Reilly. She is a member of the CESBCY Executive (the Chapter's representative to national council). She has returned to school to complete Master's of Public Administration. The final report for this project will form be her final paper in that program. (For information on the program at UVic, please see is <http://publicadmin.uvic.ca/>).

If you have any questions about this review, you may contact any one of the following:

Lisa O'Reilly
(lead researcher)
loreilly@uvic.ca

Wendy Rowe
CESBCY President
(project sponsor)
wendy.rowe@royalroads.ca

Jim McDavid,
University of Victoria professor
(academic supervisor for the project)
jmcdavid@uvic.ca
250.472.4293

Importance of this Research: At this time, the SMP does not reflect any comments or input from the Chapter's Yukon membership. The review of the SMP will determine progress to date and to amend the SMP to include the needs and concerns of the whole of its membership, including its Yukon members.

Participants Selection: You are invited to participate in this research as a survey respondent to provide your insights on the past activities and successes of the Chapter, as well as on the goals and priorities for member services.

What is involved: To participate in this research, please click the link below to begin the survey.

Risks: There are no known or anticipated risks to you by participating in this research.

Benefits: The updated SMP will be provided to the CESBCY for use as a management tool and will be available to the membership.

Voluntary Participation: While you may be professionally acquainted with the researcher, this should in no way influence your decision whether or not to participate. Similarly, while your input is greatly appreciated, please remember that this invitation is completely voluntary. If you decide not to participate, or to withdraw from participation, there will be no consequences to you or to CESBCY.

Confidentiality: Your confidentiality and the confidentiality of the data will be protected. The following survey is anonymous. Responses cannot be linked to individuals.

Dissemination of Results: The resulting report will be disseminated at a paper defence at the University of Victoria and directly with the CESBCY Executive. The CESBCY practice is to provide access to members only in a password protected section of the organization's website. This report will be similarly available.

Disposal of Data: Data collected as a part of this review will be used expressly for this research. Data will be destroyed once report approved. While in use, data will be secured and access limited to investigator only.

Contacts: If you have any questions about my research project, you may contact me or Jim McDavid anytime. In addition, you may verify the ethical approval of this study, or raise any concerns you might have, by contacting the Human Research Ethics Office at the University of Victoria (250-472-4545 or ethics@uvic.ca).

That is what I needed to know

This review is designed to serve two purposes:

- To complete a mid-term review of the CESBCY's 2008-2012 Strategic and Marketing Plan (SMP), including recommendations on priorities within the SMP for the CESBCY; and,
- To revise the SMP to reflect the changes in the Chapter's membership.

This survey should take 10 minutes or less to complete. *

- ★ I agree to participate in this survey
- I will not be participating in this survey

About you

We have purposely not linked this survey to the membership data within the CES database. For that reason, we'd like to confirm some demographic data for comparison to the membership data base as a whole.

★Are you currently

- a member of the CES based in either BC or the Yukon
- a member of the CES based elsewhere in Canada and on the CESBCY mailing list
- not a member of CES and on the CESBCY mailing list

About you ... in CESBCY

★How long have you been a member of CESBCY Chapter?

- <1 yr
- 1-3 yrs
- 4-10 yrs
- 10 yrs

★What area of the province / territory do you live in?

- Vancouver (Lower mainland)
- Fraser Valley
- Vancouver Island (South)
- Vancouver Island (North)
- Okanagan - Interior
- West Kootenays
- West Coast North
- Interior North
- Yukon – Whitehorse
- Yukon – outside Whitehorse
- Other (please specify)

About you ... your background

★Type of employer:

- Federal Government/Agency

- Provincial/Territorial Govt/Agency
- Municipal Govt/Agency
- College/University
- School System
- Social Service
- Healthcare
- Nonprofit
- Private Firm
- Other (Please specify:)

- ★ Have you received any formal and specific academic training in program evaluation? Yes No
- ★ Have you received any on-the-job training in evaluation? Yes No
- ★ Have you received any continuing education courses/workshops on evaluation? Yes No

★To what extent are you involved in program evaluation in your present position?

- Primary Focus
- Major Focus
- Minor Focus
- Not at all

★How did you find out about the CES?

- Attended an Essential Skills Series Workshop
- Attended a Chapter Event
- Attended an Annual National Conference
- Through the Canadian Journal of Program Evaluation
- From Personal Network
- From Employer or Co-Worker
- Other (Please specify:)

Evaluation in your work

★Which of the following statements are true for you? Please select as many as apply

- I use evaluation results in decision-making.
- I manage and/or contract out evaluation work.

- I conduct evaluations as an internal evaluator.
- I am an evaluation consultant (private sector or academic) and conduct evaluations for clients.
- I help build evaluation capacity as an academic.
- I conduct research into evaluation.
- I train others in aspects of evaluation work.
- I wish to work in evaluation, but have not yet done so.
- I believe in the benefits of evaluation, but am not currently active in the field.

★ Does your employer have an internal or external evaluation policy?

	Yes	There is one in development, but it is not yet complete	No	Not sure
We have an internal evaluation policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
We have an external evaluation policy.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Credentialing

★ Have you considered applying to be a Credentialed Evaluator through the Canadian Evaluation Society?

- Yes
- No

Why / why not?

If yes,

Have you begun the application process

- Yes
- No

Why / why not?

Benefits of membership

★What benefits do you *currently* derive from the CESBCY?

	Minimal	Somewhat	Considerable
Understanding of current practices and the state of research for evaluation in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional credibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affiliation with a professional association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to professional development and training opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with colleagues who share professional interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to collaborate on projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentoring opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of contracting and employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Chapter goals

★Looking forward, please rate how important the following benefits of CES membership are to you:

	Not important	Somewhat important	Very important
Understanding of current practices and the state of research on evaluation in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional credibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affiliation with a professional association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to professional development and training opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with colleagues who share professional interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to collaborate on projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentoring opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of contracting and employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What do you see as the three most important issues that currently impact the CESBCY?

First

Second

Third

The Chapter developed a strategic and marketing plan in 2007. Five goals were developed under this plan. We would like to know whether these goals continue to be important to the membership. Please rate the importance of each goal, from low to high.

	Low	Medium	High
★ BC and Yukon evaluation stakeholders belong to a Community of Practice.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ BC and Yukon evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ CESBCY has the organizational capacity to achieve the other goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ CESBCY is seen as the leader of the BC and Yukon evaluation community of practice, representing all sectors and stakeholders across the province.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ Evaluation makes a positive contribution to decision-making in BC and the Yukon.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Are there other issues or priorities that you believe the Chapter should focus on now and into the future? Do you have advice on when and how to go about this?

Goal achievement

The objectives of the workplan associated with the SMP are the following, please rate how successful you feel we have been in achieving these outcomes?

	Not Successful	Successful	Exceeded Expectations	Cannot Comment
★ The relevance of evaluation to good decision-making is understood and recognised in sectors that could benefit.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
★ BC has appropriate provincial policies on	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

evaluation.

- | | | | | |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| ★ Nonprofits in BC can implement evaluation effectively, relevant to their needs | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY members who wish to do so, can find and contact each other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Evaluation stakeholders can share information with CESBCY and each other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Evaluation stakeholders can learn from each other | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Evaluation stakeholders are aware of career opportunities and service providers in BC | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY has a high profile in the BC evaluation community of practice | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY's management is representative of the leaders in the evaluation community | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY membership is growing and satisfied | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Understand professional development needs. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Continue to offer standard CES training. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Develop/support new professional development offering based on need. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Ensure that CES professional designations are relevant and accessible to CESBCY members | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ Encourage and support junior evaluation stakeholders | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY has clear strategy. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY has provincial and local structures that allow it to pursue its strategy. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| ★ CESBCY has the human resources to carry | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

out the work.

- ★ CESBCY has the tools to carry out the work.



Please tell us why you think that

You have indicated that we have exceeded expectations in [piped answers]. Please tell us why you think that?

You have indicated that we were not successful in [piped answers]. Please tell us why you think that?

Final thoughts

Any final thought on either CESBCY or the future of evaluation in this region of Canada?

Figure 72 2007 Survey questions

2007 CESBC member survey

Q1 How long have you been a member of CESBCY Chapter?

- <1 yr
- 1-3 yrs
- 4-10 yrs
- 10 yrs

Q2 What area of the province / territory do you live in?

- Vancouver (Lower mainland)
- Fraser Valley
- Vancouver Island (South)
- Vancouver Island (North)
- Okanagan - Interior
- West Kootenays
- West Coast North
- Interior North
- Outside BC
- Other (please specify)

Q3 As an evaluation practitioner, what benefits do you derived from your membership in the CESBC Chapter?

	Minimal	Somewhat	Considerable
Understanding of current practices and the state of research for evaluation in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional credibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affiliation with a professional association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to professional development and training opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with colleagues who share professional interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to collaborate on projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentoring opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of contracting and employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q4 As an evaluation practitioner, what other benefits do you derive from your membership in the CESBC

Chapter?

Q5 Please rate how important these benefits are to you given your expectations as a member.

	Minimal	Somewhat	Considerable
Understanding of current practices and the state of research for evaluation in Canada	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Professional credibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affiliation with a professional association	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to professional development and training opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with colleagues who share professional interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to collaborate on projects	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mentoring opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Awareness of contracting and employment opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q6 As someone who uses the information resulting from or who procures evaluations, what benefits do you derive from your membership in CESBC Chapter?

	Minimal	Somewhat	Considerable	Not applicable
Access to credible evaluators	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to professional development and training opportunities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Networking with colleagues that share professional interests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Opportunities to collaborate on procurement or in the use of evaluations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Distribution of contracting and employment notices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q7 As someone who uses the information resulting from or who procures evaluations, what other benefits do you derive from your membership with CESBC Chapter?

Q8 Given your earlier responses, where should the CESBC Chapter focus its efforts in the following areas

in the coming year (s)?

	Not Important	Somewhat Important	Very Important	N/A
Introductory workshops on evaluation frameworks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Introductory workshops on logic modeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Introductory workshops on survey and data collection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The Essential Skills Series on Evaluation workshops	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advanced workshops on logic modeling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monthly or bi-monthly speaker events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monthly or bi-monthly networking events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monthly distribution of employment or contracting notices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Monthly postings of news items on the Chapter website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Allowing for service providers to advertise on the Chapter website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Provision of an electronic forum for members to dialogue on critical issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Q9 What other services or activities should CESBC Chapter provide?

Q10 What suggestions might you have on how CESBC Chapter might increase its visibility and relevance to evaluation practitioners and users of evaluation in BC?

Q11 How might CESBC Chapter promote the development of a Community of Practice among evaluators in B.C.?

Q12 There has been recent debate on whether CES should establish a system of professional designation for evaluators. Do you support this direction?

- Definitely not
- Perhaps
- Yes, depending on how implemented
- Definitely yes

Q13 What additional comment do you have regarding a professional designation for evaluators?

Q14 If you support the idea of a professional designation for evaluators, what would you like to see?

- membership required in CES
- credentialing (based on training and experience)
- certification (based on examination process)
- all of the above

Q15 Is there anything else you would like to say in regards to your needs as an evaluator practitioner or user of evaluation?

Appendix C. Annotated SMP Performance Framework

The following table includes the original performance framework from the 2008-2013 SMP. This includes fifty-three (53) actions associated with achieving the 19 objectives within the five goals. For each goal and objective, the framework includes a respective priority, timing, planned action, responsible individuals, available resources (if known) and anticipated performance indicators. Added to this framework is a comments and assessment column describing evidence found for the respective actions and a brief assessment of whether the given Action has been completed, is moot, requires additional effort, or should be reconsidered by the Chapter before additional actions need be undertaken.

Priority	When	Action	People	Resources	Indicators	Comments
Goal 1: Evaluation makes a positive contribution to decision-making in BC.						
Objective 1: The relevance of evaluation to good decision-making is understood and recognised in sectors that could benefit.						
High (2010)	2008	Develop "elevator pitches" for evaluation: basic, non-technical, BC-oriented information: <ul style="list-style-type: none"> • What is evaluation? • How does it fit with other review disciplines? • How does it support decision-making? • Publish this information on website. 	Advocacy: recruit/task experts Experts: develop information Communications: write up, publish	Page-linked visit counter (\$), feedback voting tool (\$)	Information is available Number of visitors to information web pages Number of visitors rating as useful	Aspects of this activity have been achieved. In 2008 a tri-fold information flyer was developed including a description of CES and CESBC, information on how to join, as well as details on programs offered and the then-pending 2009 National Conference. Flyer distributed at CESBC events. This information was included in the flyers for 2009 ESS sessions and then transferred to the website. ...about_cesbcy ...national-cesef Advocacy specific marketing tool remain outstanding. "Evaluation is..." page is included as a page on the CESBCY website and includes books, journals and presentations related to evaluation and other related fields (some details courtesy of ppx.ca and mymande.org) ...aboutevaluation Web-metrics, including page counts, visits, place of origin for visitors is tracked via Google Analytics and included in the 2010 Annual Reports to members. Visitors not asked to rate the usefulness of the website.

Priority	When	Action	People	Resources	Indicators	Comments
						Note: the on CESBCY's LinkedIn page identified the number of events available, the number of participants at events, and the number of unique visitors to the website were identified as measures of usefulness of the website. These measures are included in the 2010 Annual Report, partially included in the 2012 CESBCY Report to CES National.
High (2010)	2009 onwards	Conduct targeted information/ outreach work to promote evaluation in priority sectors and organizations. To enhance reach and reduce CESBC effort, use targets' own systems as far as possible (websites, meetings, publications). Start by focusing on possible 2010 conference attendees.	Advocacy: recruit/ task outreach Communications: materials Outreach workers: present/ write	Presentations , leaflets (\$)	Number of organizations/ individuals reached Number of articles published	There is no specific record of efforts undertaken on this action.
Desirable	Ongoing	Encourage members to promote evaluation in own networks and report back.	Membership			There is no specific record of efforts undertaken on this action.
Medium (2010)	2009 onwards	Collect case studies of evaluation supporting decision-making in BC. Disseminate by website/ information/ outreach work. Develop 1 case in time for 2010 conference.	Advocacy: collect cases Communications: write up, publish	Case studies		Action not undertaken.

Priority	When	Action	People	Resources	Indicators	Comments
High (2010)	2010	Use CES 2010 conference to attract mainstream media to value of evaluation.	2010: press work	Media pack	Coverage in media	No indication of any mainstream media attention. Implications of this are unclear.
Objective 2: The BC government adopts an appropriate evaluation policy						
Urgent	2008	Coordinate with identified BC government evaluation champions to identify roles/ action for CESBC in current initiatives.	Advocacy Others to be determined based on discussion	To be determined	To be determined	<p>A number of champions were identified in the original SMP. Discussions were held with champions prior to the 2010 Conference, but no substantive relationship was established. There are existing provincial government contacts and pockets of evaluation are continuing.</p> <p>Resources and indicators have not yet been identified. Was this really a priority for the Chapter or was this either (a) a 'nice-to-have' goal or (b) sought after too soon in the life of the Chapter? If this were to be renewed, which resources and indicators would be committed?</p>
High (2010)	2009 onwards	Develop strategy to advocate for BC evaluation policy, with advice from members/ friends in government. Initial focus on using 2010 conference to advantage.	Advocacy Others to be determined based on discussion	To be determined	To be determined	<p>No specific advocacy strategy was previously developed. Consultations with volunteer members resulted the suggestion that an advocacy team made up of academics, practicing internal and external evaluators, and evaluation users. This team could then approach decision-makers (within the BC government, immediately following the next election). It was suggested that evaluation focused on internal learning and program improvement linked to the policy cycle be promoted to these decision-makers (potentially referencing the CUEE).</p> <p>Specific suggestions included using examples of quality evaluations that benefited policy and program managers, a briefing on the CE program as a filter for identifying qualified suppliers, as well as quality control tools and checklists that are available for those new to evaluation.</p> <p>Importantly, such an advocacy team should use existing nomenclature i.e. 'evidenced-based decision-making' would be</p>

Priority	When	Action	People	Resources	Indicators	Comments
						essential in any discussions or advocacy to the BC government. Avoiding the use of the term 'accountability', but focussing on the learning and program improvement aspects of evaluation uses were similarly suggested.
Medium	2009 onwards	Encourage (if necessary support) BC government CESBC members to establish an evaluation network within government.	Advocacy Communications	To be determined	Number of network member Level of activity	Evaluation within the BC provincial government exists in pockets (36 positions) and has some internal allies, but is generally perceived negatively. Outside of healthcare, there are no records of specific efforts to develop an evaluative community of practice in the public sector (there was one specific concurrent session in the 2010 Conference focused on developing a health-care centred community of practice).
High (2010)	2009-2010	Use 2010 conference to showcase evaluation in government, and recruit participation of key BC officials and decision-makers.	2010		Key players participating/ sending messages to conference	The Conference included a small number concurrent sessions that specifically promoted successful evaluation practices in healthcare and education. No specific recruitment of BC officials and decision-makers is identified in the Conference Report or other sources.
Objective 3: Nonprofits in BC can implement evaluation effectively, relevant to their needs						
High	2008	Coordinate with identified nonprofit evaluation champions (donors/ support organizations) to identify roles/ action for CESBC in current initiatives.	Advocacy Others to be determined based on discussion	To be determined	To be determined	There have been some limited efforts made, notably connections the Michael Smith Foundation that presented at an AGM and Community Volunteer Connections that jointly hosted an event linking evaluators with nonprofits. These efforts were early in the life of the SMP.
Medium		Help recruit members to nonprofit boards by publicizing vacancies.	Communications		Number of members on boards	Action not undertaken.
High		Provide and publicize free advertising space	Communications	Online space	Number of RFPs advertised	Opportunities were originally included in the events calendar of the website. As of 2011, an automated online tool is used to pull

Priority	When	Action	People	Resources	Indicators	Comments
		for nonprofit evaluation RFPs.				"information from the Opportunities page on CES' national website, and from colleagues in two other organizations, AEA Career Center New Job and RFP Postings and International Development Research Centre Job Feed."(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2013)
High (2010)	2009-2010	Include sessions targeted to BC nonprofits in 2010 conference program (with advice from contacts).	2010		Nonprofit registrations	<p>Nonprofits registrations were not reported on in the 2010 Conference Report.</p> <p>The 2010 Conference Program had a range of concurrent sessions that were generally useful (e.g. on data collection techniques), and a small number delivered by professionals associated with nonprofits, as well at four that specifically mentioned nonprofits in the description.</p> <p>There were no nonprofit specific workshops or poster presentations (Conference Organizing Committee (COC) for the 2010 CES National Conference, 2010).</p>
Goal 2: BC evaluation stakeholders belong to a Community of Practice.						
Objective 4: CESBC members who wish to do so, can find and contact each other						
High	2008	Provide password-protected online facility for CESBC members who wish to do so to share profiles and contact information, enabling independent networking.	Communications	Profile facility (\$)	<p>Number of profiles</p> <p>Number of members making contact</p>	<p>The CESBCY website offers a member-only area, including member directory. There are 11 members listed.</p> <p>In 2008, the Chapter established a page on LinkedIn. The LinkedIn site has provided the service originally envisioned. 262 people, over 60% of which are in BC and the Yukon, participate in or monitor the discussions and events. (CESBCY on LinkedIn, 2013).</p>
Objective 5: Evaluation stakeholders can share information with CESBC and each other						
Medium (2010)	Mid 2009	Establish and promote regular free CESBC e-publication to circulate information about evaluation in BC among stakeholders.	Communications Editor Marketing	Publishing and subscription facility (\$)	<p>Number of non-member subscribers</p> <p>Level of reader input</p>	<p>The Chapter issues irregular email updates to announce news and upcoming events. Between April 2009 and March 2013, twenty-nine (29) email blasts with news from the Chapter were sent to contacts, an average of one every five and a half weeks.</p> <p>The email updates go out to 593 contacts, 170 are identified as</p>

Priority	When	Action	People	Resources	Indicators	Comments
						<p>CES members, the remaining 423 are Chapter contacts, but not CES members (other members of the evaluation community).</p> <p>Starting in 2008, the Chapter established a social media presence, using LinkedIn, Twitter and linking to the Society's Facebook page (http://www.linkedin.com/groups/Canadian-Evaluation-Society-British-Columbia-93729, https://twitter.com/CESBCY, and https://www.facebook.com/ces.sce).</p> <p>The front page of the website and the events page auto-generate RSS feeds that go to the CESBCY LinkedIn page, the Chapter twitter account, and the CES National page on Facebook.</p> <p>By 2013, the Chapter had eighty followers on Twitter, including individuals, organizations and other professional associations (@CESBCY, 2013).</p> <p>The LinkedIn group page had 262 members, over 60% of which were in BC and the Yukon (CESBCY on LinkedIn, 2013).</p> <p>While the Society's Facebook page has nearly 500 'likes', many of whom are CESBCY contacts, this is not a measure of Chapter success.</p> <p>The website and social media sites are providing the communication updates envisioned by the Action.</p>
Medium	Ongoing	Review viability of EDE-L for seeking member input and for member networking/ info exchange. Promote EDE-L to members or	Communications	Alternative tool (\$)	Number of members using EDE-L or alternative system	<p>CES National retired EDE-L in 2011. At the same time a CES Facebook page was created.</p> <p>The CES National page has 441 'Likes' There are 233 members of the LinkedIn page, 150 of whom are members of the Chapter.</p>

Priority	When	Action	People	Resources	Indicators	Comments
		explore alternatives.				Facebook and LinkedIn provide venues for information exchange envisioned by the Action.
Medium	Ongoing	Ensure that all events (including training) include networking time.	PD Area Coordinators			No specific measure or reporting of this action has been found. No evidence one way or the other.
Objective 6: Evaluation stakeholders can learn from each other						
Medium	2010	Run events (online, teleconference or live) where stakeholders can share experiences through presentation and thematic discussion. Bring together evaluation professionals who share sectoral interests.	PD Area Coordinators Marketing	Webinar and teleconference hosting, rooms, refreshments (\$)	Number of participants (disaggregate for members and non-members) Event evaluation	Lunch time event have specific and targeted themes that have become more specific over time and include <ul style="list-style-type: none"> • Speaker Series with guest speakers • Evaluation theory • Practicum and experiences CES specific initiatives (i.e. the development of the CE designation) have also been offered. Member-only events (or events that include the cost of membership) include the CEC meetings, ESS, and the AGMs. Of thirty lunch-time or full-day Chapter events included in the Chapter calendar (starting in April 2009), 27 were member-only or reduced rates for members. The remaining three included a reduced rate for early booking, but not for CES members.
Objective 7: Evaluation stakeholders are aware of career opportunities and service providers in BC						
High	Early 2009	Provide and promote online space to advertise evaluation services of CESBC members.	Communications Marketing: promotion	Online space Page hit counter (\$)	Number of members using service Number of page hits	Evaluation Service Providers in BC and the Yukon page (http://bc.evaluationcanada.ca/providers) includes eleven service providers – seven from organizations who have personal that have volunteered with the Chapter. Email blasts have included offers to include service providers on the page. Four service providers have shared their information this way.
High	Early 2009	Provide and promote free online advertising space for evaluation RFPs and jobs.	Communications Marketing: promotion	Online space	Quarterly trends in jobs/ RFPs posted	Opportunities were originally included in the events calendar of the website. As of 2011, an automated online tool is used to pull "information from the Opportunities page on CES' national website, and from colleagues in two other organizations, AEA

Priority	When	Action	People	Resources	Indicators	Comments
						Career Center New Job and RFP Postings and International Development Research Centre Job Feed."(Canadian Evaluation Society - British Columbia and Yukon Chapter, 2013)
Goal 3: CESBC is seen as the leader of the BC evaluation community of practice, representing all sectors and stakeholders across the province.						
Objective 8: CESBC has a high profile in the BC evaluation community of practice						
High	2008 onwards	Promote CESBC as authority on evaluation: <ul style="list-style-type: none"> • Initiate/ maintain contacts with evaluation stakeholders in different sectors and locations • Seek information from contacts on evaluation initiatives in BC and ensure CESBC is invited to relevant events. • Explore partnership possibilities. 	Presidency Area Coordinators Advocacy Marketing		Number of generated leads Frequency of contacts Number of invitations issued to CESBC Number of requests for CESBC advice	There are no specific reports related to this Action. Some partnered events have been planned / hosted and a small number of industry or field specific events have been held (i.e. nonprofits, government).
High	From 2009	Support every CESBC-organized event with a targeted marketing campaign.	Marketing Area Coordinators PD	Database	Participation from target groups	Chapter organized events are all promoted on the Chapter website on the CES National website, and as of 2009 via the RSS feed from the Chapter that feeds the LinkedIn page, the @CESBCY Twitter account, and the CES page on Facebook.
High (2010)	2009-2010	Use marketing for CES 2010 conference to market CESBC as BC evaluation champion.	2010		Number of registered participants from BC	The Conference attracted 422 registrants, including 105 BC registrations, of which 37 were new to CES.
Objective 9: CESBC's management is representative of the leaders in the evaluation community						
High	2008	Recruit a student member to PEC.	Membership		Student PEC member	While students have participated in the CES/CESEF case competition (see below), there are no student members on the CEC, nor is there an outstanding position to be filled.
Medium	2010	Recruit PEC candidates from different sectors,	Membership		PEC diversity compared to	The vast majority of the Volunteer Chapter Executive are/were from the private sector. The other volunteer members are/were

Priority	When	Action	People	Resources	Indicators	Comments
		professional backgrounds and regions.			segmentation.	from education, health, and the provincial government. This is reflective of the Chapter's traditional membership demographic, but not of its planned increase in membership scope.
Objective 10: CESBC membership is growing and satisfied						
High	2008 Ongoing	Create standard materials to promote membership (web content, leaflets), and distribute at every event or meeting organized/attended.	Communications Event organizers Outreach	Leaflet printing (\$)	Materials exist and are available	Individual promotional materials have been produced for specific events. Promotional materials for the 2010 Conference were produced and distributed at the 2009 CES National Conference and Chapter events preceding the 2010 Conference. The Chapter website is promotional. There are no standard printable materials available online or to the CES members of the Chapter to promote membership.
Medium	Ongoing	Encourage members to recruit members, and make promotional materials accessible.	Membership		Trends in word-of-mouth recruitment (This information is collected through membership application forms, which ask applicants how they heard about CES)	The data from the membership application forms is provided to CES National. Neither CES National, nor its prior Secretariat service provided any summary of the results of those application forms. Following the change in Secretariat services, it is unclear whether that data will be onward collected and/or shared with the CES membership, its volunteer-members.
High	2008 ongoing	Every new/departing member gets personal contact (at least phone call) from CESBC to discuss needs/reasons for leaving. Information is collected and collated to improve	Area Coordinators: calls, reports Marketing: standard questions, information collation	SkypeOut accounts (\$)	All new/departing members are contacted and report is made to Marketing	No specific reporting is done in relation to this Action. Consultations indicate that by and large this has not been the practice of the CEC to telephone incoming or departing members. Irregular email blasts were delivered to departing members to confirm that they were departing and including a link to a Past

Priority	When	Action	People	Resources	Indicators	Comments
		performance.	Secretariat: member info for Area Coordinators			Member Feedback form (http://bc.evaluationcanada.ca/PastMemberFeedback). Only one such form has been completed since implemented in 2009 (which indicated that the individual was changing careers).
Medium	2010 & 2012	Survey membership needs and satisfaction (about every 2 years): - in 2010 after National Conference - in 2012 in preparation for SMP.	Marketing All coordinators (content)	Survey consultant (\$)	- Survey results - Changes based on results	A survey of the attendees to the 2010 CES National Conference was conducted as part of the Conference evaluation. The results were included in the 2010 Conference Report. A survey of all contacts was included in late 2011 for this review and is discussed in Appendix B
Goal 4: BC evaluation stakeholders have knowledge and skills, relevant to their needs, to use evaluation appropriately.						
Objective 11: Understand professional development needs						
Medium	See above	Include professional development needs in regular membership survey.	PD		PD questions in survey	Membership surveys were conducted <ul style="list-style-type: none"> • in 2007 in advance of the SMP, • in early 2010 specifically focusing of PD needs • in late 2011 for this review, which did not specifically touch on PD needs
Desirable	Ongoing	Use other opportunities (e.g. events) to sound out the membership in between surveys.	Event organisers: report to PD			No specific records include this measure.
Objective 12: Continue to offer standard CES training (ESS, Logic Models, Survey Research)						
High	2009	Promote standard training more widely.	Marketing	Database	Participation levels	The stand alone Logic Models and Survey Research courses have not been offered by CESBCY, 2008- 2013 ESS was offered in the fifteen (15) times between January 2010 and January 2013 <ul style="list-style-type: none"> • 6 times jointly offered with Royal Roads University • 5 times in Lower Mainland (LM) • 1 time in the Interior (Kelowna) • 1 time in the Yukon <ul style="list-style-type: none"> • 2 times 'in-house' • 1 time for the Yukon government

Priority	When	Action	People	Resources	Indicators	Comments
						<ul style="list-style-type: none"> • 1 time for the LM United Way (Other than the in-house offerings) each time these events for promoted via the Chapter website, on the CES National website, and as of 2009 via the RSS feed from the Chapter that feeds the LinkedIn page, the @CESBCY Twitter account, and the CES page on Facebook. None of these offerings lost money and most were sold out, allowing the Chapter to use the revenue to support other offerings.
Medium	2010	Explore how standard training can be tailored to BC context and specific sectors.	PD Trainers			No specific records relating to this Action is recorded. Consultations indicate that trainers provided written and in-person feedback to CES National on the ESS curriculum. Event descriptions indicate that in-person training events offered by CESBCY members as Courtesy Posts focus directly on the Chapter's context.
Objective 13: Develop/support new professional development offering based on needs						
Medium	2010	Explore market and potential partners for new PD content (especially advanced and sectoral content).	PD Marketing	Trainer fees (\$)	Participation levels	In addition to Conferences, 90 in-person and online were offered, including: <ul style="list-style-type: none"> • 41 online UNICEF IDEAS webcast • 31 Lunchtime events (Speaker series / lunch and learn) – averaging 80% participation rates, some waitlisted • 15 in-person training events offered by CESBCY members as Courtesy Posts from: <ul style="list-style-type: none"> • (Community Solutions Planning & Evaluation www.communitysolutions.ca, • Demonstrating Value www.demonstratingvalue.org, • PME Inc. www.pmeinc.ca/ and Tindall Consulting http://atrimonta.ca/index.htm • 2 CES National webinars • 1 full-day advanced event (Practical (progress) measurement and (impact) evaluation for initiatives in complex environments, a workshop with Steve Montague, CES Fellow) – Sold out

Priority	When	Action	People	Resources	Indicators	Comments
						Attendance rates for courtesy posts and CES National webinars are unknown.
Desirable	2011	Trial new PD delivery methods that could increase accessibility (e.g. webinars, teleconferencing).	PD Communications	Trainer fees (\$) Hosting (\$)	Participation levels (by delivery method)	Chapter events were provided in-person. Consultations indicate that one in-person event in Vancouver trialed a means to deliver the event in-person and via teleconference, the trial was unsuccessful. The volunteered technology was insufficient to handle the need. Ten online offerings from the Chapter and 41 courtesy postings for webinars were promoted to members between 2009 and 2013.
Objective 14: Ensure that CES professional designations are relevant and accessible to CESBC members						
High	2008	Ensure BC realities and CESBC member needs (across the community segments) are represented and understood in credentialing committees. Ensure progress is shared with community and views are solicited.	National Council PD		Credentialing decisions reflect needs/ situation of BC community	<p>The Chapter hosted 3 concurrent discussion forums available to all members Consultations on CES National development of Professional Designation Program – Credentialed Evaluator designations (webinar) in April 2009. Additional members dialled in to the webinar. These consultation mirrored the 2007 member survey: Chapter members expressed interest in a credentialing process and preferred one that required CES membership and based on training and experience. When the PDP program was announced later in 2009, these ideas were incorporated into the parameters of the CE designation (Canadian Evaluation Society, 2010).</p> <p>As of March 2013, there were 204 Credentialed Evaluators, of these 21 (10%) were from the CESBCY Chapter (Canadian Evaluation Society, 2013). At that point, there were 170 (8.8%) CES members in BC and the Yukon, out of a total of 1930 CES members(Canadian Evaluation Society, 2012).</p> <p>In further discussions of performance indicators, volunteer Executive members suggested including the number of CES members in the Chapter who are Credentialed Evaluators.</p> <p>Over 70% of survey respondents in 2011 had considered</p>

Priority	When	Action	People	Resources	Indicators	Comments
						applying to be a CE, over 20% had begun the application process.
Objective 15: Encourage and support junior evaluation stakeholders						
High	2008	Establish a student section and promote CESBC membership to students.	Student		Number of student members	While students have participated in the CES/CESEF case competition (see below), there are no student members on the CEC, nor is there an outstanding position to be filled.
High	Ongoing	Promote CES Case Competition to BC students.	Student		Participation of BC teams	<p>Teams for BC participated in the Case Competition each year from 2009- 2012. 17 different students and six different coaches participated. (CES/CESEF Student Case Competition, 2013)</p> <p>2012 University of Victoria, Public Administration, Graduate Studies</p> <ul style="list-style-type: none"> • Suman Budhwani • Dulcie Fernandes • Naomi Jehlicka • Keith Williams (Thea Vakil-coach) <p>2011 Royal Roads University, Faculty of Management</p> <ul style="list-style-type: none"> • Michael Anderson • Diana Claxton • Rodson Garcia • Devin Rose (Don Prescott-coach) • Jennie Straughan (Lane Sherman-coach) <p>2010 University of Victoria, Public Administration, Graduate Studies</p> <ul style="list-style-type: none"> • Frances Bryan • Theresa Hunter (Jim McDavid-coach) • Jane Vermeulen (Lisa O'Reilly-coach) <p>2009 University of British Columbia and Simon Fraser University, Interdisciplinary Graduate Studies Program & Health Sciences</p> <ul style="list-style-type: none"> • Ipsita Banerjee

Priority	When	Action	People	Resources	Indicators	Comments
						<ul style="list-style-type: none"> • Hannah Moffat • Kristen Stewart • Jennifer Terpstra • Meredith Woermke (Wendy Rowe-coach)
Medium	2011	Assess willingness of established professionals to act as mentors, to determine feasibility. If feasible, develop outline of mentoring responsibilities, and pilot with initial group of mentors and mentees. If successful, launch and promote scheme to junior CESBC members, students and universities.	PD Student Marketing		Number of mentors Number of relationships Mentee feedback	The Core Mentoring Working Group formed in 2009 as a partnership between some West Coast evaluators and others in the National Capital Area. Rather than duplicate, the Chapter provided online and administrative support of this group's effort. As of 2011, the Chapter has been providing banking support and financial resources. (The group subsequently received additional support from other CES Chapters and the CES National Council). The group developed what is now 'Evaluation Mentoring Canada' (www.evaluationmentoringcanada.ca). The Mentoring Program was in beta testing in March of 2013 and plans to have a full launch in time for June 2013 to coincide with the annual gathering of evaluators at the CES National Conference.
Goal 5: CESBC has the organizational capacity to achieve the other goals.						
Objective 16: CESBC has clear strategy						
Urgent	2008	Develop 2010 conference plan.	2010		Plan approved by PEC	Plan was developed by the Conference Organizing Committee (COC). Regular updates on Conference development were provided to all contacts a dozen times during the 2010 Conference planning period. These remain available on the Chapter website in the 'Member Zone' along side the Conference Report.
High	2008	Develop area plans.	Area coordinators		Plans approved by PEC	Consultations indicate that area plans were produced in 2008 and 2009. Some are available to the CEC in the CESBCY Forum (not open to all members, only those volunteering). Consultations also indicate that this additional level of formal planning may drain rather than focus volunteer capacity.

Priority	When	Action	People	Resources	Indicators	Comments
High	Annually	Produce annual CESBC plans and reports.	Presidency Treasurer		Publication to members	<p>Minutes from the Annual General Meetings from 2007-2010 are available on the Chapter website in the 'Member Zone'</p> <p>The Minutes from the 2011 AGM are not online, although consultations indicate that these have been prepared in draft form.</p> <p>There are no Annual Plans.</p>
High	2012	Evaluate progress, prepare new situation analysis and new SMP.	Presidency	Consultant (\$)	New SMP in place	<p>This Review and update was identified and begun in 2011. The Report was delayed until later than the planned 2012 renewal date. Preparation of the subsequent SMP is outstanding.</p> <p>Using the data in this report, CESBCY can develop a subsequent SMP. Recommended next steps would be to review the objectives and goals in the 2008-2012 SMP and determine whether there is the volunteer capacity to undertake related initiative, proactively engage with the Society's National and communicate any related future plans to the Chapter, conduct a needs assessment and SWOT analysis based on those details, and engage with the membership through webinar and/or in-person meetings to determine priorities for the Chapter for the next five year period.</p>
Objective 17: CESBC has provincial and local structures that allow it to pursue its strategy						
Urgent	2008 (after SMP)	Assign PEC portfolios.	Presidency	SMP	Balanced portfolios assigned	<p>The following portfolios identified in the SMP (pp.32) were assigned to volunteer members as follows</p> <ul style="list-style-type: none"> ✓ Presidency (President, Vice President, Past President) ✓ Treasurer ✓ Secretary ✓ National Council Representative ✓ Marketing & Communications (originally separate, these two portfolios are managed by one volunteer member) ✓ 2010 Conference (shared between 2 co-chairs) ✓ Ideas for paid Secretariat tasking

Priority	When	Action	People	Resources	Indicators	Comments
						<p>~ Advocacy joined with Presidency-related roles, this became part of 2010 Conference organization and then later dropped as an explicit group of tasks due to limited volunteer capacity.</p> <p>~ Professional Development (inc. Area Coordinators), the local coordinators continued to organize local PD events with varying degrees of coordination.</p> <p>✘ Student Section, remains unfilled ✘ Membership, not explicitly assigned</p> <p>The SMP called for the VP to “assists the President in the carrying out of her or his duties”</p> <ul style="list-style-type: none"> • Constitutional responsibility • Project and program development • Maintenance and development of membership • Strategic planning (e.g., regarding issues of ethics and accreditation) • Raising funds • Coordinating special projects <p>The SMP identified the Membership role as responsible for recruitment and retention of CESBC volunteers</p> <ul style="list-style-type: none"> • Managing advertising of volunteer positions • Recruiting volunteers (in-person contacts.) • 2008 Recruit a student member to PEC • 2009 Develop PEC succession strategy (identifying and encouraging candidates) • From 2010, Recruit PEC candidates from different sectors, professional backgrounds and regions • Focal point for volunteer retention: <ul style="list-style-type: none"> • monitoring tasking of individual volunteers • monitoring satisfaction of volunteers (type and level of tasking)

Priority	When	Action	People	Resources	Indicators	Comments
						<ul style="list-style-type: none"> • Encouraging members to recruit new members <p>Given that the VP role includes an aspect of membership maintenance, that the VP is relatively vague, and that the Membership role remains unfilled, it would make sense for the VP role to focus nearly exclusively on membership, with an emphasis on volunteer support. This could include providing ongoing support to volunteers, ensuring regular and repeated thanks to members (privately and publicly), assisting members to find discrete roles in which they can volunteer their services, tracking the needs of members to ensure that their needs are being met by the volunteers</p>
Urgent	2008	Build 2010 committee.	2010 Membership		Committee in place	<p>The initial members of the COC, including one of the co-chairs, was in place in late 2007. The COC grew as volunteers came forward to culminate in a committee of eighteen people who managed and coordinated with a larger volunteer pool of forty volunteers.</p> <ul style="list-style-type: none"> • Co-Chairs – Reed Early & Sandra Sellick • CESBC President – Wendy Rowe • Treasurer – Russell Graham • Secretary – Tammy Bennett • Evaluation – Diana Tindall • Program – Yvon Dandurand • Workshops – Bill Reid • Local Arrangements – Lori Berndt • Program Advisor – Betty-Ann Lee • Volunteer Coordinator – Beth Snow • Thematic Events – Kylie Hutchinson • Sponsorships, Marketing & Promotion – Brian McGowan • Student Case Competition – Helen Hsu • Translations – Jacynthe Bouchard • Eco-Advisors – Karen Truesdale & Kim Walker

Priority	When	Action	People	Resources	Indicators	Comments
						<ul style="list-style-type: none"> Hospitality Suites – Donna Carrigan (Conference Organizing Committee (COC) for the 2010 CES National Conference, 2013)
Low	2011	Review constitution for fit with strategy.	Presidency			At the 2010 CESBCY AGM, the By-laws were formally updated to include the membership of the Yukon (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2010). This Review of the SMP, specifically the internal document review, found that the positions outlined in the SMP were not separately included in the Chapter By-laws, but rather implemented under the provision of 'Any other position which may be created by CEC from time to time, (Section 5.7.1.), (Chapter Bylaws revised October 2010, 2010). The two documents do not otherwise conflict.
Objective 18: CESBC has the human resources to carry out the work						
Urgent	2008 Ongoing	Recruit volunteers (after PEC portfolios are assigned). Maintain overview of all volunteers.	Membership All coordinators	SMP	Number of positions filled	<p>Consulted Executive members highlighted the expansion of the Executive itself to include the communications / marketing lead, as well as the dozens of volunteers who stepped forward to organize and host the 2010 Conference. In 2012, the Chapter had a full slate of established officer positions for its volunteer Executive Committee.</p> <p>While this is an overall success, the breadth of volunteering members is heavily focused on private sector consultants, with few or no government or nonprofits volunteers. The exact number of volunteers is not known.</p> <p>Missing from the CEC are advocacy, membership, and student positions. (Canadian Evaluation Society - British Columbia and Yukon Chapter, 2012).</p>
High	2008 Ongoing	Recruit student volunteers.	Student	SMP	Number of student volunteers	<p>Connections with the Student Case Competition (CES-CESEF joint program) resulted in some connections to students, however not as volunteer members of the Executive.</p> <p>As of March 2013, there was no student representative, nor was</p>

Priority	When	Action	People	Resources	Indicators	Comments
						there a specific student position on the CEC.
Urgent	2008	Organize management protocol for paid Secretariat. Evaluate after trial.	TBD		Coordinators know when/how they can use System continued or ended after trial	A paid secretariat service was established with in 2009 to support both the Conference preparation and the Chapter management with Daphne Rintoul VOA Services. Her role has varied depending on volunteer capacity and needs. The connection was made through the professional network of volunteer member Wendy Rowe as they both have connections to Royal Roads University. To date, no formal review of services has occurred and the relationship continues. A formal review of the needs of the Chapter and services provided should be considered by the Chapter.
High	2009 (or as soon as possible)	Develop PEC succession strategy (identifying and encouraging candidates).	Membership		Number of vacancies Number of contested elections	Full slate of listed officers every year since 2008. Elections were contested in 2011 and 2012 for available positions. Advocacy, Student, and Membership positions remain outstanding.
Objective 19: CESBC has the tools to carry out the work						
High	2008 ongoing	Develop and maintain constituent database.	Marketing	List of data fields, Database tool (\$)	Database exists, regularly updated	The website includes a database that is updated roughly monthly The included fields are: - Volunteer Chapter Executive - Current CES Member - Mailing List - CES Member from outside BC & Yukon - Other contacts (admin) As of May 2013, there were a total of 563 contacts in the Chapter database. Each one of these contacts include - First and last name - Email address - Any event that they may have attended - Which of the broadcast emails or administrative emails they

Priority	When	Action	People	Resources	Indicators	Comments
						<p>have received.</p> <p>The database records for CES members also includes all of the associated member data. Further, members are also asked to self-identify whether they have received any awards or designations, namely:</p> <ul style="list-style-type: none"> - CES Fellow - Credentialed Evaluator - CES Award Winners (Contribution to Evaluation in Canada, Service to the CES, Canadian Journal of Program Evaluation Award) - Public Sector Award - Private Sector /Not For Profit Award
High	i2008 ongoing	Maintain files on key issues accessible to all PEC members.	Secretariat	Shared online drive (\$)	Files exist	<p>Minutes and reports are included in the Forum and on the website in the member only area.</p> <p>Chapter By-laws, the SMP, and the Chapter's financial policy are published on the Chapter website, as is the Society's Finance Policy</p> <p>Additional Society-wide policies and by-laws are not currently listed nor linked to on the Chapter website (although a motion had been past to do so, volunteer capacity to do so remains outstanding).</p> <p>Some volunteer time is needed to upload outstanding Society documents to Chapter website.</p>
High	2008-2009	Upgrade basic communications infrastructure.	Communications Secretariat		Infrastructure in place	<p>Members of the CESBCY Executive have ongoing access to the Chapter Forum. A guide on how to use the Forum was developed for new members in 2011. Email communication with Volunteer Chapter Executive is facilitated through the Forum. CESBCY has email communication with members and with the Executive through the CESBCY website.</p> <p>Starting in 2008, the Chapter established a social media presence, using LinkedIn, Twitter and linking to the Society's</p>

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						<p>Facebook page (http://www.linkedin.com/groups/Canadian-Evaluation-Society-British-Columbia-93729, https://twitter.com/CESBCY, and https://www.facebook.com/ces.sce). By 2013, the Chapter had eighty followers on Twitter, including individuals, organizations and other professional associations (@CESBCY, 2013). The LinkedIn group page had 262 members, over 60% of which were in BC and the Yukon (CESBCY on LinkedIn, 2013).</p>