



Strategic Planning 2018

Stakeholder Consultation Background Document

June 6, 2018

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snmanagement

An Introduction:

The Canadian Evaluation Society – Ontario Chapter (CES-ON) is one of the largest provincial chapters of the Canadian Evaluation Society (CES), a not-for-profit, national, professional association of evaluators committed to advancing evaluation theory, knowledge and practice through leadership, advocacy and professional development. CES-ON has over 375 members, representing different sectors including the provincial and municipal governments, non-profit organizations, health care and social service agencies, school boards, colleges and universities, and private sector consultants. CES-ON supports its members through professional development, standards, member support, education and the promotional activities.

Why We Are Reaching Out:

The CES-ON Board of Directors is currently undertaking a planning process to develop a comprehensive and sustainable integrated strategic-operational plan (ISOP) that will anchor and guide the organization over the next five years. We are reaching out to CES-ON's different stakeholder groups as part of the planning process. Our aim is to foster the sharing of perspectives and ideas which will help to guide us with our next steps in the planning process. CES-ON has contracted with SN Management to support us with the planning process.

ISOP Goals

Our objectives for the planning process include:

- Reflect the input of diverse stakeholders
- Take into account the internal and external environment
- Capitalize on CES –ON strengths, competencies, and aspirations
- Provide a compelling vision, mission and values to ground the organization
- Identify clear strategic directions and goals, implementation plans, performance targets and process monitoring to guide the organization decisions and activities over the next 3-5 years and ensure it is relevancy and sustainability
- Identify diverse potential revenue sources for the chapter
- Develop a strategic marketing framework for CES-ON in support of the ISOP

What We Have Done To Date:

To date, SN Management has reviewed internal and external documents, conducted semi-structured telephone interviews with key stakeholders and facilitated a focus group session with the CES-ON Board of Directors. The lines of questioning have focused on:

- Strengths
- Areas of differentiation
- Challenges and risks
- Opportunities
- Partnerships

What We Learned:

Results have been analyzed, presented and discussed by the Board of Directors, CES-ON and have helped us to better understand our strengths, challenges, risks and opportunities. These are presented below:

Strengths	<ul style="list-style-type: none"> • Well documented policies and processes • Dedicated president and executive team members • Credibility; a leading chapter within CES National; flagbearer for evaluation in Ontario • Professional development offerings • Regular engagement with members (i.e., member surveys) • Effective membership committee and professional development committee • Risk taking and innovative culture
Challenges	<ul style="list-style-type: none"> • Lack of human resources; Board and committees are highly operational • High board turnover and small number of active Board members • Limited collaboration among CES National and other chapters • Limited revenue model hampered by lack of capacity to test, implement and market new service offerings • Membership structure is managed by CES National • Limited presence outside of GTA and success with training delivered outside the GTA • Limited capacity to advocate/further evaluation with government, funding bodies, non-profits such as Ontario Non-Profit Network
Risks	<ul style="list-style-type: none"> • Limited organizational capacity and infrastructure – CES-ON's opportunities to advance evaluation (provincially, nationally, internationally) may be missed • Technology – advances in remote learning; long term impact of CES National e-Training Institute <ul style="list-style-type: none"> • Other membership-based organizations that compete for potential members or who are engaged with potential partners (Project Management Institute, Social Value Canada)
Opportunities	<ul style="list-style-type: none"> • Build system wide evaluation capacity: <ul style="list-style-type: none"> • Convene critical discussions across diverse stakeholder groups to build excitement about useful evaluation, social impact of evaluation • Nonprofit capacity building initiatives • Develop and deliver robust knowledge sharing and professional development opportunities <ul style="list-style-type: none"> • Training, mentoring, coaching, cafes, networking etc. • Develop and offer training on leading issues: modeling, power relationships, privacy, ethics in evaluation, rapid impact evaluation, network evaluation, indigenous frameworks, big data, etc. • New governance, organizational and operating model <ul style="list-style-type: none"> • Revenue generation via funding proposals and other revenue streams

In addition, we have identified three emerging themes as described below:

Capacity Building:

- There is growing interest and excitement in evaluation to advance equity, quality and population outcomes (i.e., evaluation can advance the public good)
- There is an increasing need for rigorous evaluation to demonstrate return on investment, and to report on quality and outcomes
- There is limited and highly variable capacity for evaluation across the province and across sectors (i.e., GTA and health are best resourced)
- Funders are investing in organizations across the province and across human service sectors to build evaluation capacity (i.e., Ministry of Citizenship & Immigration Partnership Grant Program)
- There is interest among policy and decision makers to collaborate with CES-ON (i.e., Embracing Diversity and Evaluating Inclusion-focused Initiatives Panel with Ontario Trillium Foundation)
- CES-ON is well positioned to be the provincial convener of critical and emerging discussions in evaluation (diversity, Indigenous evaluation, ethics, big data)

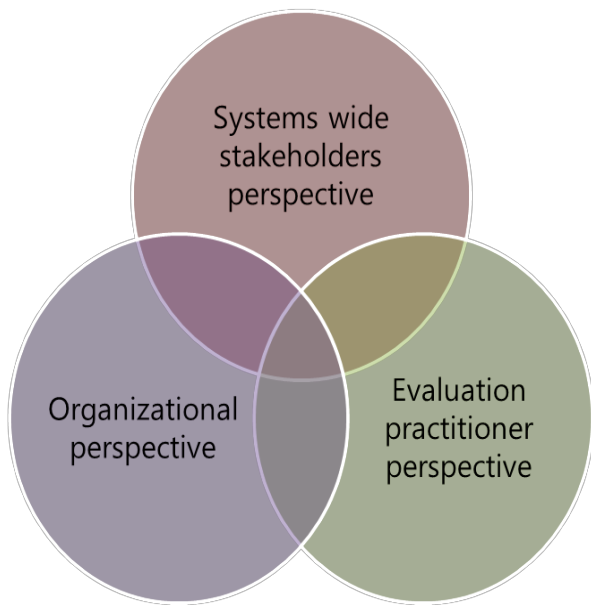
Professional Development

- The delivery of professional development training and courses is CES-ON's "bread and butter"
- Existing training fees (i.e., Essential Skills course) may be prohibitive for new practitioners and may be a barrier to participation in CES – an important issue to consider given that only 12 of 344 members are new practitioners (practicing for less than 2 years)
- Social and technological change is driving PD: privacy and ethics, principled evaluation and community-based evaluation, artificial intelligence and big data, data visualization
- There is an increasing focus in on-line/remote training, including CES National's e-Institute
- CES-ON's PD is face to face and its provincial reach is limited primarily to the GTA
- Credentialing is not top of mind as it is seen as restrictive by stakeholders consulted

Sustainability

- CES-ON will not be able to address core limitations with its current organizational model (i.e., volunteer based)
- There are different perspectives as to the need to be incorporated and/or whether charitable status is needed to develop a robust financial model
- There is agreement that CES-ON should staff up; however, there are different perspectives regarding the role that is needed (i.e., project manager(s), Executive Director)
- There is a need for more integrated PD, membership and financial planning
- There is an interest in expanding the membership model and service offerings to build revenues
- There is an obligation to demonstrate that diverse perspectives are being taken into account at CES-ON and that Indigenous people are included in this work (i.e. CES National has a public statement valuing reconciliation in evaluation)
- There could be greater collaboration between CES National and the chapters; CES-ON often drives change (i.e., piloting membership categories, new PD courses)
- There is brand confusion among stakeholders who express difficulty differentiating between CES-ON and CES National; between CES-ON and National Capital Region

Overall the findings align with one more of the areas of overlap as shown below.



Systems Wide Stakeholders:

- Increasing need for rigorous evaluation to report on quality and outcomes
- Limited & highly variable capacity for evaluation across the province and across sectors
- Funders are investing to build evaluation capacity in non-profits
- Interest among policy and decision makers to collaborate with CES – ON

Evaluation Practitioners:

- Diverse stakeholder group
- Evolving and specialized training and PD needs
- Increasing focus in on-line/remote training

Organizational:

- Governance and organizational structure limits capacity to advance training, PD, knowledge brokering, capacity-building and revenue generation
- Limited presence beyond GTA
- Obligation to demonstrate diversity
- Obligation to be inclusive of Indigenous peoples
- Limited collaboration with CES and challenges with membership structure

Our Next Steps:

Over the coming months, CES-ON will be checking in with our diverse members and stakeholders. On June 19th, we will host a session that will be facilitated by SN Management during which members will have an opportunity to provide their feedback to inform a draft vision, mission and set of values and to obtain input on key considerations and future directions and strategies for change. In addition, we will be reaching out to stakeholders and members via email. We will be asking stakeholders to consider and provide input on some of the issues and questions that are central to CES-ON's relevance and sustainability into the future:

- What is the theory of change for CES-ON? What are our end goals?
- Who are our key stakeholders and what are their different needs?
- What is CES-ON's role and value add for each of these groups given our strengths and the competitive landscape?
- How can CES-ON engage with our diverse members and stakeholders across the province to ensure that we are an inclusive organization and board?
- What kind of creative revenue generation options can we consider to increase our sustainability?
- What kind of creative ways can we use to strengthen our organizational agility and capacity?

A final report that summarizes key points from the stakeholder consultations and proposed future directions and priorities for CES-ON will be made available to members.

We thank you in advance for your time, support and creativity!