

# 2021 ACTION PLAN



**2021 BOARD OF DIRECTORS**

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***Washington Evaluators Purpose Statement***

The purpose of Washington Evaluators is to: (a) Promote scientific and educational purposes, as those terms are used in Section 501(c) of the Internal Revenue Code, in connection with the science and practice of evaluation in both the public and private sectors of society; and (b) Provide a regional, interdisciplinary forum for professional development, networking, and exchange of practical, methodological and theoretical knowledge in the field of evaluation.

*Washington Evaluators 2021 Annual Action Plan*

Dear Washington Evaluators,

Following the approval of the Washington Evaluators Strategic Plan for 2021-2024, the 2021 Board of Directors outlined an Action Plan to include a series of items to be implemented throughout this year. In this 2021 Action Plan, the Board has outlined specific action items (✓) and targets (❖), and identified who among the Board is responsible (\*), indicating how we intend to make progress toward each goal and objective. At the end of this year, we will provide an update to our members, illustrating the progress we have made on these items.

In January 2021 we committed to spending this year building on the strengths of the past while also finding new ways of engaging and creating value for our membership and our community. We wanted to focus on inclusivity and access and to develop a strategic plan that would help guide us for the years ahead.

This 2021 Action Plan, shaped by our overarching [diversity, equity, inclusion, and antiracism](#) framing a guiding principle, outlines our deep commitment to achieving the broader objectives of the organization, ensuring that we operate efficiently and for the benefit of our members and the broader evaluation community in the Washington, D.C. area.

We are excited to continue our association's strong tradition of promoting the field of evaluation in the Washington, D.C. area (and even beyond) in 2021, and we thank our members for supporting and sustaining a strong community of local evaluators.

Regards,

Beeta Tahmassebi  
2021 President  
Washington Evaluators

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### **Diversity, Equity, Inclusion, and Antiracism Framing**

Diversity, equity, inclusion, and antiracism are key concepts used to frame the [Washington Evaluators 2021-2024 Strategic Plan](#) and this Action Plan. These concepts, collectively referred to in this plan as diversity, equity, inclusion, and antiracism, are defined below to clarify the intent and direction of Washington Evaluators' plans.

**Diversity:** Diversity includes all the ways in which people differ, and it encompasses all the different characteristics that make one individual or group different from another. It is all-inclusive and recognizes everyone and every group as part of the diversity that should be valued ([Racial Equity Tools](#)).

**Equity:** The condition of fair and just opportunities for all people to participate and thrive in society regardless of individual or group identity or difference. Striving to achieve equity includes mitigating historical disadvantage and existing structural inequalities ([American Evaluation Association](#)).

**Inclusion:** Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy making in a way that shares power ([Racial Equity Tools](#)).

**Antiracism:** Active process of identifying and eliminating racism by changing systems, organizational structures, policies and practices and attitudes, so that power is redistributed and shared equitably ([Washington Evaluators](#)).

### **Guiding Principle**

*Ensure WE operates in alignment with our commitments to antiracism, integrating diversity, equity, and inclusion into all elements of our work by being consistently intentional in our approach to the following:*

- *Exploring our identity in terms of our membership profile and in response to our members' needs.*
- *Evaluating and assessing language, content, and access related to communications, programming, and community engagement. WE will commit to using inclusive and antiracist language.*
- *Promoting, uplifting, and learning from the experts who are doing similar work on a daily basis.*
- *Sponsoring accessible programming and content that resonates with the full range of our membership, and nurturing community engagement that is representative and mutually beneficial.*

**Strategic Goal #1:**

Increase key audience (i.e., emerging, new & experienced evaluators, university ambassadors, and nonprofits) engagement and sense of belonging through outstanding diverse, equitable, and inclusive programming.

**► Objective 1.1: Enhance Community Engagement (CE) and Programs outreach and program structure to increase volunteer and participant engagement.**

- *Develop and activate outreach protocols that welcome and ensure a diverse and robust volunteer pool.*

✓ **In 2021, the Board will provide guidance and tools to members and volunteers to support volunteer/participant recruitment such as WE digest blurbs and letters that can be tailored or personalized. Guidance also includes the hosting of events, e.g., a Board Fair, Meet and Greet, and one-on-one meetings to facilitate Board and committee recruitment.**

\* All Board members

❖ Action to be measured by number and type of tools created in 2021 and number and type of Board and committee recruitment events.

- *Build on WE programming efforts to increase volunteer engagement to both present available opportunities and connect with members about how else they would like to engage with WE.*

✓ **In 2021, the Board will continue to hold at least 3 events that focus on volunteer engagement opportunities with the CE Committee to both present available opportunities and connect with members about how else they would like to engage with WE.**

\* Community Engagement Chair and Coordinators, Program chair lead

❖ Action to be measured by holding three themed virtual dinners in 2021.

- *Explore further engagement with university and college students in the Washington, DC region from colleges and universities with degree programs in evaluation, in coordination with efforts to strengthen the University Ambassador (UA) program.*

✓ **In 2021, the Board will explore creation of a CE Co-Chair position that would have the responsibility of coordinating the UA program. Alternatively, the Board could establish a CE committee member role responsible for coordinating the UA program.**

\* All Board members

❖ Action to be measured by the creation of this CE role in 2021.

✓ **In 2021, the Board will assess the opportunities and barriers to designing a stronger UA program. The New Professional Scholarship Co-Coordinators will administer a brief survey to the current UAs and the 2021 NPS recipients to inform this assessment.**

- \* Scholarship Coordinators, Community Engagement Chair
- ❖ Action to be measured by submission of key assessment findings to the Board in 2021.

✓ **In 2021, the Board will begin the process of designing a stronger UA program. Using data and insights from the UA and NPS recipient surveys, the CE committee will develop a draft revised UA program design. This design will be reflected in a revised “Starting a Campus Ambassadors Program” document and shared with the Board.**

- \* Scholarship Coordinators, Community Engagement Chair
- ❖ Action to be measured by creation of draft revised UA program design in 2021.

- *Develop plans to make access to these opportunities more equitable, regardless of “location”, and welcoming evaluators at all career stages.*

✓ **In 2021, the Board will encourage more 2022 scholarship applications by implementing an outreach protocol featuring past awardees and targeted to current UAs and other dissemination channels. This outreach will be informed by the UA and NPS recipient brief surveys.**

- \* Scholarship Coordinators, Community Engagement Chair
- ❖ Action to be measured by creation of outreach messaging and number of outreach communications emailed in 2021.

✓ **In 2021, the Board will rebrand MM as Career Consultation for member evaluators at all career stages (and locations) with the option of pairs being able to continue in mentoring relationships as they desire. The MM Co-Coordinators will revise the design of MM and the MM webpage will be updated with Board approved revisions.**

- \* Mentor Minutes Coordinators, Community Engagement Chair
- ❖ Action to be measured by revised MM webpage that reflects rebranding by first quarter of 2022.

✓ **In 2021, the Board will explore new strategies to increase members’ access to volunteers who provide Career Consultation. The MM Co-Coordinators will brainstorm new strategies for the Board to consider (e.g., when people join WE have an automatic opt-in to be mentor; send an email to all current members recruiting mentors; and/or regularly include requests for mentors in Weekly Digests and social media.)**

- \* Mentor Minutes Coordinators, with Membership Committee, Community Engagement Chair
- ❖ Action to be measured by number and type of strategies submitted for consideration in 2021.

✓ **In 2021, the Board will explore producing the DC Student Conference on Evaluation and Policy (SCEP) Conference in 2022.**

\* Program Chair, Student and New Professional Task Force Chair

❖ Recommendations and a proposal submitted to the Board for decision. If approved by the Board, completion of this action will be further measured by successful production of the conference in 2022.

- *Enhance maturity of systems and processes to align with best practices in operating mentorship and Evaluation Without Borders programs, while at the same time keeping quality control procedures, oversight, and administration burden manageable given WE is volunteer led.*

✓ **In 2021, the Board will begin planning the pilot of a system for tracking performance measures and/or evaluation of CE programs giving attention to reducing administrative burden. Coordinators will provide a list of priority performance measures as described in the action item of Objective 1.4.**

\* Community Engagement Chair, Evaluation Without Borders and Mentor Minutes coordinators

❖ Action to be measured by creation of performance measures document in 2021.



► **Objective 1.2: Increase engagement of nonprofit leaders and staff to increase the number of partnerships for Evaluators Without Borders and other programs.**

- *Using a diversity, equity, inclusion, and antiracism lens, identify underrepresented nonprofits and develop and activate outreach protocols focused on these nonprofits.*

✓ **In 2021, the Board will create a 2021 Evaluation Without Borders Lessons Learned brief to include lessons about identifying and engaging underrepresented nonprofits that can inform 2022 planning and outreach.**

✓

- \* Evaluation Without Borders coordinators lead, Community Engagement Chair
- ❖ Action to be measured by creation of 2021 Lessons Learned brief in 2021.

- *Support new and emerging evaluators engagement in pro bono evaluation service and create synergies with Mentor Minutes, the New Professional Scholarship, and other programming.*

✓ **In 2021, the Board will explore designating a small number of Evaluations Without Borders teams to also provide a mentorship opportunity for new and emerging evaluators. The 2021 Lessons Learned brief will inform this exploration.**

- \* Evaluation Without Borders coordinators lead, Community Engagement Chair, All Board members
- ❖ Action to be measured by creation of 2021 Lessons Learned brief in 2021.

► **Objective 1.3: Increase the number of WE activities that directly support the professional development of new and emerging evaluator WE members from two (i.e., New Professional Scholarships and Mentor Minutes) to 5.**

- *Support students and other new and emerging evaluators in obtaining meaningful professional development experiences through CE and other programming.*

✓ **In 2021, the Board will explore producing the DC SCEP Conference in 2022.**

- \* Program Chair, Student and New Professional Task Force Chair
- ❖ Recommendations and a proposal submitted to the Board for decision. If approved by the Board, completion of this action will be further measured by successful production of the conference in 2022.

- *Develop defined pathways for new and emerging evaluator engagement and leadership in Evaluation Without Borders, University Ambassadors, and WE Board committees.*

✓ **In 2021, develop a menu of leadership roles for students that can be recommended to institutions that join the UA program (e.g., Student Ambassadors who work in collaboration with the faculty Ambassador). These roles will be described in the UA program design documentation.**

- \* Scholarships coordinators lead, Community Engagement Chair
- ❖ Action to be measured by creation of a draft revised UA program design that includes leadership roles for students in 2021.

**► Objective 1.4: Implement a process to track progress and success across all Community Engagement programs to inform improvement efforts and share lessons learned with the field.**

- *Develop and implement a tracking system across all CE programs that is low burden and easy to sustain over time.*

✓ **In 2021, the Board will begin planning the pilot of a system for tracking performance measures and/or evaluation of CE programs. CE program coordinators will provide a list of priority performance measures for their respective programs. Using this information, the Board will consider whether a uniform reporting system or program specific reporting system should be developed. In the latter case, the procedures should be easily replicable for future CE teams (e.g., evaluation forms programmed in the Google forms on the CE Google drive).**

\* Community Engagement Chair, All CE Coordinators, All Board Members

❖ Action to be measured by development and approval of performance measurement system by December 2021.

**Strategic Goal #2:**

Diversify professional development opportunities and expand access and belonging for the Washington Evaluators community.

**► Objective 2.1: Create opportunities for the entire Washington Evaluators community to develop professional skills.**

- *Promote WE volunteer opportunities more broadly in order to encourage all members and potential members to take advantage of this professional development opportunity*

**✓ In 2021, announce all events in the Member Digest and also by separate email.**

- \* Program Chair, Communications Chair lead
- ❖ Action to be measured by review of Communications outreach in 2021.

- *Develop, curate, and share professional development and dissemination opportunities that offer a range of activities/ opportunities to meet prospective participants needs related to timing, topic, format, etc.*

**✓ In 2021, Washington Evaluators will host at least 4 virtual networking events and 4 virtual skill-building events over the year. Topics events will vary across Evaluation topics.**

- \* Program Chair, Communications Chair lead
- ❖ Action to be measured by review of 2021 event schedule.

- *Solicit input and feedback to ensure that offerings meet WE members' professional development needs and interests.*

**✓ In 2021, conduct a brief, end-of-year survey with all members via the Digest to understand if their needs were met this year and how to approach programs in the future.**

- \* Membership Chair, Communications Chair lead
- ❖ Action to be measured by review of 2021 end-of-year survey results.

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- *Provide diverse opportunities for members to lead learning/networking events.*

✓ **In 2021, ensure speakers, panelists, etc. are representative of the variety of evaluation topics, themes that are of interest to WE's membership.**

\* Program Chair leads

❖ Action to be measured by review of the 2021 event schedule.

► **Objective 2.2: Expand access to and belonging in professional development events/activities.**

- *In addition to offering members-only programming, be sure to organize some events that are open to the public to ensure access and inclusion for those who may not be able to join the WE community, as well as expand outreach to potential members.*

✓ **In 2021, offer at least 4 programs that are free and open to the public.**

\* Program Chair leads

❖ Action to be measured by review of the 2021 event schedule.

- *Proactively assess the need for and offer captioning, American Sign Language (ASL), and other adaptive support for WE programs, in order to include a broader audience.*

✓ **In 2021, consider options for how to increase awareness of the accessibility needs of program/event participants.**

\* Membership Chair, Program Chair lead

❖ Action to be measured by the suggestions provided to the incoming 2022 Program Chair.

**Strategic Goal #3:**

Structurally embed justice, equity, transparency, accessibility, and belonging in Washington Evaluators' leadership and Board operations.

**► Objective 3.1: Accelerate efforts to engage, recruit, and retain diverse volunteers and leaders of Washington Evaluators.**

- *Accelerating recruitment of new leaders from underrepresented groups for positions of service in Washington Evaluators will help ensure the organization's sustainability and continued ability to serve all evaluators in the community when implementing the goals and objectives outlined in this Strategic Plan. Diversity and equity are critical to the leadership pipeline in the long term, especially since a member must serve as a Board member for 9 months prior to running as President-Elect for a 3-year term on the Board.*

✓ **In 2021, Examine bylaws for possible changes that increase equity and transparency, particularly revisiting the language granting extensive power to the President-Elect to recruit candidates for appointment to the Board.**

\* All Board members

❖ Action to be measured by the submission of nominations and recruiting conversations in 2021.

✓ **In 2021, the Board will hold widely announced recruiting seminars and events for potential new leaders, will hold a President's Dinner for Board recruitment, and announce nominations call to all AEA members in the DC metropolitan area. These events will be publicized in August to ensure sufficient time to gather a full slate of candidates.**

\* Secretary, Program Chair, Communications Chair lead

❖ Achievement of this action will be determined by completion of events, attendance at recruiting events and holding an organizational election in October or November, including candidates for all positions vacated by the end of 2021.

- *The Washington Evaluators committee infrastructure can provide meaningful opportunities for leadership development for individuals while leveraging their perspectives and contributions to engage and attract more and diverse members to the organization.*

✓ **In 2021, the Board will review Standard Operating Procedures and monitor distribution of tasks to ensure that coordinators and committee members have opportunities for leadership, beyond administrative duties.**

\* All Board members

❖ Action to be measured by review of Board minutes where this discussion takes place and any changes to SOPs and distribution of tasks.

✓ **In 2021, the Board will formalize a Co-Coordinator model for CE programs (including a Co-Chair role for the Community Engagement Chair role) which will both provide additional WE member volunteer opportunities and provide additional capacity to facilitate enhanced CE outreach and execution of innovative ideas. Give CE Co-Coordinators the flexibility to establish ad hoc or standing sub- committees when feasible, to provide additional volunteer opportunities for WE membership including new/emerging evaluators and provide the additional capacity to advance innovative ideas.**

\* Community Engagement Chair leads

❖ Action to be measured by review of Board minutes from motion to formalize the Co-Coordinator model for CE programs.

- *All Board members, in addition to the President-Elect, will proactively recruit individuals to serve on or chair committees and task forces with the strong intention of expanding diversity of perspective and representativeness of the Board.*

✓ **In 2021, All Board members suggest at least 3 people during the nominations period and have a conversation with at least one person.**

\* All Board members

❖ Action to be measured by the submission of nominations and recruiting conversations in 2021.

✓ **In 2021, the Board will plan for baselining and tracking recruitment processes at each stage. The Board will fully consider the impact on membership of collecting (optional) demographic information on a member survey or at member registration and renewal.**

\* Membership Chair leads

❖ Action to be measured by the submission of a proposal for Board consideration and decision in 2021.

- *Washington Evaluators will accelerate efforts to transparency, accessibility, and inclusivity during recruitment for Board positions, including extensive outreach and providing clarity on roles, responsibilities, competencies, and level of effort.*

✓ **In 2021, the Board will assess progress and document actions that work in the Elections Standard Operating Procedure.**

\* Secretary

❖ Action to be measured by the submission of nominations and recruiting conversations in 2021.

- *The Board of Directors will create a culture of belonging, trust, and acceptance where individuals feel valued, supported, and heard. The Board will examine organizational norms and behaviors to identify, acknowledge, and remedy practices antithetical to an inclusive environment. The culture of belonging will be enabled by*



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*Board members truly listening and understanding others' perspectives, encouraging openness to change and learning, and promoting individual and collective accountability.*

✓ **In 2021, the Board will hold a feedback discussion with Board members on the culture of the Board.**

\* President leads, Secretary documents, All Board members

❖ Action to be measured by holding one Board feedback discussion in December 2021 or January 2022.

► **Objective 3.2: Maintain the financial sustainability of Washington Evaluators and use funds to redress structural inequities.**

- *A strong financial situation for Washington Evaluators ensures the organization will continue to provide quality programming that is also equitable to its members. The Board of Directors strives to exercise in good faith its fiduciary duty to the members of the organization and to be transparent about financial decisions.*

✓ **In 2021, Washington Evaluators Board will approve an operating budget, with modification as appropriate throughout the year, and the Treasurer will provide routine reports to the Board on revenues, expenditures, and assets, and a statement for all members in the annual report.**

\* Treasurer

❖ Action to be measured through annual approved budget, published on the Washington Evaluators website, and monthly Treasurer reports.

✓ **In 2021, the Board will approve a spend plan, to ensure a proportion of funds are spent. This is to ensure that members feel that they are receiving good value for the annual dues they pay.**

\* Treasurer, with support from Committee Chairs

❖ Action accounted for in the operating budget.

✓ **In 2021, the Washington Evaluators Board will maintain a reserve funding balance of \$5,000, and the Treasurer will monitor and make recommendations about an appropriate balance for subsequent years.**

\* Treasurer

❖ Action to be measured through reserve account balance.

- *Washington Evaluators will accelerate the redress of structural inequities by redistributing financial resources to serve the marginalized and vulnerable segments of the population it represents.*

✓ **In 2021, the Board will plan to restructure the membership dues and communicate regularly with the membership about goals of (re)distributing funds and dues.**

\* Membership Chair, Program Chair lead

❖ Action to be measured by the submission of a proposal for Board consideration and decision in 2021.

► **Objective 3.3: Ensure the Board of Directors operates and makes decisions in a manner that is effective, transparent, accessible, and reaches out to marginalized groups of the population it serves.**

- *The Washington Evaluators Board will regularly examine, edit, and update the Bylaws, policies, and procedures to ensure they reflect the organization's values and priorities for advancing diversity, equity, and inclusion for both members and potential members. The Board of Directors will regularly review the Bylaws to ensure that the organization's structure continues to serve and align with the organization's and its members' needs, especially marginalized segments of the community it serves. To accomplish this, the Board of Directors will identify, acknowledge, and remedy the practices and behaviors antithetical to advancing equity and inclusion.*

✓ **In 2021, the Board will write and approve a Board Decision-making Standard Operating Procedure and post on the Washington Evaluators webpage to members.**

- \* Secretary leads with support from President-Elect by request
- ❖ Action to be measured by draft of SOP and approval by Board in 2021 or January 2022 by new Board.

- *The Board of Directors will review, edit, and update policies, procedures, meeting minutes, and other documents for transparency and accessibility, ensuring that the language is plain, inclusive, and antiracist and that materials are disseminated in user-friendly and accessible formats.*

✓ **In 2021, the Board will review meeting minutes for transparency and notify members when Board meeting minutes and key documents have been posted on the website. The Board will devise a plan for reviewing all existing SOPs.**

- \* Secretary, Communications Chair lead
- ❖ Action to be measured by review and approval of minutes and notification of minutes' posting. Development and approval of guidance for reviewing for plain language and inclusivity and a timeline for review of existing SOPs.

- *As volunteers join the Board of Directors periodically, the Board will produce and revise training mechanisms to share knowledge and ease burden on Board members. Washington Evaluators will develop and maintain appropriate training and procedural documentation. Each year, the Board will strive to distribute work equitably across Board positions and recruit volunteers as necessary to lighten individual volunteers' level of effort required.*

✓ **In 2021, the Board will review and improve Board Transition Standard Operating Procedure with the aim of reducing the level of effort for Board members to on-board.**

- \* All Board members
- ❖ Action to be measured by review, revise, and approve SOP by December 2021.

- *The culture and history of Washington Evaluators is constantly evolving, and sufficient records are needed to maintain this information over time. Washington Evaluators will strive to provide public documentation about the history of the organization and its decision making.*

✓ **In 2021, the Board will post the new strategic plan, and Standard Operating Procedures on the website, viewable to members only, while also retaining historical versions of key documents, such as strategic plans, minutes, bylaw changes.**

\* Communications chair

❖ Action to be measured by posting of documents on the website by December 2021.

- *The Board of Directors will strive to enhance and expand its communication and outreach efforts for maximum transparency and accessibility, as well as to solicit feedback from both members and non-members for continuous learning and improvement.*

✓ **In 2021, the Board will hold at least one check-in and feedback session with the membership (e.g., progress since the membership meetings in January).**

\* President leads, all Board members

❖ Action to be measured by holding one check-in meeting in the last half of 2021.