Introduction

- AES Case Study
- Details in the Paper
- Highlight some key points
- Discuss examples
Background
History of the AES

- New Zealand & Australia
- Established 1987
- a learned society.
- Dr Elaine Martin
- Founding Fellows
  - Dr Anona Armstrong
  - Dr John Owen.
  - Sue Funnell
  - Chris Milne
  - Professor Colin Sharp
  - Ian Trotman
Objectives

- establishing and promoting ethics and standards in evaluation practice as a service to the community of evaluators and users of evaluations;
- encouraging advances in the theory and practice of evaluation by publishing such advances and by recognising outstanding contributions;
- providing education and training in matters related to evaluation;
- providing forums for networking and the discussion of ideas including society publications, seminars, workshops and conferences;
- acting as an advocate for evaluation and encouraging understanding about the use and application of evaluation;
- linking members who have similar evaluation interests; and
- other activities consistent with this aim.
Membership

- 1000 members
- 38% public sector
- 36% consultants
- 12% Not-for-profit sector
- 12% Academics
CYCLES

• Case study shows cycles in AES
• All organizations - cycles of growth and renewal
• Environment also cycles and affects internal dynamics
Environment

- 2 National Governments
- NZEA
- 8 States and Territories
- My experience largely with Australian Federal Government
Australian Government Changes

- Late 1980s - Golden Age
  - Portfolio Evaluation Plans
  - Evaluations published

- 1998 Output - Outcomes Framework
  - Shift to monitoring

- Big policy review

- Intermittent efforts to increase evaluation
  - Not meeting needs of Cabinet
Current

- Some Departments strong
- Tune Talks the Talk - we’ll see
- Focus on Budget Surplus and cutting expenditure
  - Federal and 4 States
- National monitoring processes
Evolution of the AES Structure and Operations
Early Days

• **1982-1992:** Executive Committee comprising three office bearers and a general membership

• In 1992, a corporate plan “AES 2000: Leading the Society into the Future.”

• AES as a broker between “doers” and “supporters” of evaluation

• part time staff to improve services
Incorporation

• 1993 incorporated Capital Territory Association
  Incorporated Act

• Board of
  • 4 office bearers,
  • regional representatives
  • 5 elected general members
1995 New Strategic Plan

- “AES Leading Evaluation Theory, Practice and Use into the 21st Century.”

- A centralised financing model was established

- A few regions were partially funded through other organisations or by sponsors
Internal v External

• Up till 2009 largely inward focus
• Even case study talks about what we did
• Previous Board started turnaround
Restructure 2009

• New AES Constitution
• 8 Member Board
• Suite of Committees e.g.
  • Membership Services and Governance
  • Conference Organising
  • Finance and Audit
STRATEGY AND IMPLEMENTATION
Strengthening an Enabling Environment

- **AES Guidelines for the Ethical Conduct of Evaluations (1997)**
- Policy Advocacy - e.g. submission to Commonwealth Financial Accountability Review
- International support
  - e.g. PNG - Association of Professional Evaluators (AoPE)
Strategy and Plans

- AES Ten Year Strategy 2010-2020
  - Vision: “To be the pre-eminent voice and leader of evaluation in Australasia”
  - Mission: “To see rigorous evaluation as central to policy development, program design and service delivery.”
Regional Activity

- Two Countries
- 10 Regions
- Volunteer Run
- Local program
  - seminars and discussion forums
  - Book club
  - Social events
- Conference Organising committee
Special Interest Groups

- Indigenous Evaluation
- Eval-Tech
- Performance measurement
- Realist Evaluation and synthesis
Annual International Conferences

• 1982 - Melbourne (before AES)
  • Links between New Zealand and Australian professionals

• 1986 - Sydney.

• Annually on rotation since
  • 350-400 participants
  • AGM
  • Awards Presentation
Evaluation Journal of Australasia

• 1987-88  The Bulletin of the AES
• 1989 changed its name to Evaluation Journal of Australasia (EJA)
• New series commenced 2001
  • Refereed articles
  • Expanding the market reach
Other Publications

• 1977-84 an evaluation newsletter edited by Jerome Winston.

• In 1992 - Evaluation News & Comments

• On-line E-News
Indigenous Evaluation

- Priority for the AES.
- Increasing the numbers of Indigenous people in evaluation;
- Strengthening the capacity of evaluators to produce high quality, ethical work in Indigenous contexts;
- Increasing knowledge, skills and competence of Indigenous and non-Indigenous evaluators.
Key initiatives

• Conference support grants
• registry of Indigenous researchers
• exploring mentoring/training pathways an
• promoting partnerships
Impacts

- Big changes lots of implementation challenges
- Environment challenges
- Membership decreased
- Operating Losses
- Plan to turn it round
BOTTLENECKS/CHALLENGES

- Building financial momentum and governance capacity
  - Conferences major source of revenue
  - Sometimes lost $
  - Appointed EO in 2011

- Dispersed geographical spread of operations

- Building an online presence
  - [www.aes.asn.au](http://www.aes.asn.au)
  - 1996 website hosted by the supplier of AES administration services at no cost.
  - New Website this year
KEY ENABLING FACTORS

• Vision and Leadership
  • Fellows
  • Boards
  • Committees

• Professional Practice and Ethics

• Building critical mass

• Sound governance principles and practice
Strategic Partnerships

- FaHCSIA & AusAID
  - Families, Housing, Community Services and Indigenous Affairs
- Supporting Good evaluation practice
- Sponsored conferences
- Aim to Develop Partnerships
INNOVATIONS AND LESSONS LEARNED

• Continuous improvement
  • change and experimentation
• Building Credibility
• Governance processes
• Business model
NEXT STEPS

• Refine structures and processes
• Implement Strategic Plan
• Improve member services
• Increase advocacy for evaluation
• Strengthen communication
• Review