

# IOCE EvalPartners profile survey of Voluntary Organizations for Professional Evaluation (VOPEs)

## I. Basic profile information

1. Name and acronym of organization (VOPE)	United Kingdom Evaluation Society (UKES)
2. Geographic scope of organization	National: <b>United Kingdom</b>
3. Contact Details	<p>Names of main contact person:</p> <p>Rosemary McMahon, Secretariat, <a href="mailto:ukes@profbriefings.co.uk">ukes@profbriefings.co.uk</a>            Colin Jacobs, President, <a href="mailto:Colin.Jacobs@britishcouncil.org">Colin.Jacobs@britishcouncil.org</a>            Derek Poate, Past President, <a href="mailto:cdpoate@gmail.com">cdpoate@gmail.com</a></p> <p>VOPE website URL: <a href="http://www.evaluation.org.uk">www.evaluation.org.uk</a></p>
<p>4. a. Current formal/ registered membership – numbers of individuals, by their affiliation (<i>if known; please at least give total</i>)</p> <p>4. b. Informal membership (persons on your mailing list)</p>	<p>Government:            NGOs/CSOs:            Academics:            Private sector (consultants):            Other:</p> <p><b>a. Total official membership:</b> 147 individuals and 24 institutions; making some 250 people in total</p> <p><b>b. Total informal membership:</b> Mailing list of 500+ individuals. Regional networks have their own mailing lists (varying from 30 in the smaller regions to 500 for London) which are periodically added to main mailing list.</p>
5. Year VOPE was founded	1994
6. Current status (identify which)	<ul style="list-style-type: none"> <li>Legally recognized by government with the status of a limited liability company with four Directors (The President, Vice President, Secretary and Treasurer). The Society lodges its accounts with Companies House</li> </ul>
7. Information about <b>growth</b> : evolution of the number of members or financial resources in the last 5 years.	<ul style="list-style-type: none"> <li>Membership is normally around 200 per year, though there has been a decline owing to austerity in recent years. However membership is now growing again.</li> <li>Turnover of membership is quite frequent owing to (a) members renewing when registering for the annual conference and particular themes attract different individuals and institutions and (b) the fact that individuals often join because their job has a strong evaluation component but when they change to a job that does not have an evaluation focus, membership is not as relevant to them.</li> <li>A membership drive has recently been undertaken resulting in a) a discount for individuals paying two years in advance and b) a reduced fee for a revised, extended institutional offer.</li> <li>The main income sources are membership fees, but these only cover all the running costs of the society. Therefore the society is reliant on a surplus generated by the annual conference and, more recently, training events.</li> </ul>
8. Purpose and mission of VOPE	<p>UKES is a professional membership organisation that exists to promote and improve the theory, practice, understanding and utilisation of evaluation and its contribution to public knowledge.</p> <p>The goals of the UKES are to:</p> <ul style="list-style-type: none"> <li>Advance and improve the theory and practice of evaluation.</li> <li>Increase understanding and utilisation of evaluation evidence and its contribution to public knowledge.</li> <li>Promote cross-sector and cross-disciplinary dialogue and debate on evaluation.</li> </ul>
9. Current strategy and emphasis	<p>The UKES Council has defined a strategy which sets out how it is planning to achieve its aspirations to be:</p> <ul style="list-style-type: none"> <li>A credible and authoritative source of information and advice on evaluation in the UK</li> <li>A key provider of CPD and training events for those involved in evaluation in the UK</li> <li>The hub of professional evaluation networks in the UK and internationally</li> </ul>

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<p><b>10. Organizational capacity:</b> Please describe your governance structure, leadership, services provided, finances, human resources, linkages with other organizations, etc.</p>	<p>UKES is run on a voluntary basis, governed by a council consisting of 15 elected members. The Council has the power to co-opt members if required. The management team consists of a President, Vice President, Immediate Past President, Secretary and Treasurer. Secretarial and administrative assistance is provided commercially by Professional Briefings [1 St Mary's Courtyard, Church Street, Ware, Hertfordshire SG12 9EF Telephone +44 1920 462411 Fax +44 1920 462730]</p> <p>Individual Council members take the lead on specific areas as set out in the most recent version of the Society's strategy and action matrix. The Society hosts an annual conference. Subsidiary networks based regionally in the UK hold topical short information and training events open to members and non-members.</p> <p>The Society has prepared and published Guidelines for Good Practice and an Evaluation Capabilities Framework.</p>
<p><b>11. Means of communication with members,</b> e.g. newsletter, listserv, publication, website</p>	<p>The Society communicates by means of</p> <p>a) a periodic eBulletin,</p> <p>b) 'The Evaluator' – the in-house publication of the Society, which publishes articles on the theory and practice of evaluation, reports on the annual conference and regional events, interviews with key evaluators and general evaluation news (e.g. book reviews, developments in the field)</p> <p>c) website which has site for members as well as general</p> <p>d) LinkedIn group of evaluators (over 350 members)</p>
<p><b>12. Past events</b> (e.g. during past year)</p>	<p>The Society held two, 5-day training workshops for the UK Department for International Development. This work was initiated by the UKES London network, and subsequently supported by the Society as a whole. The workshops provided training at an intermediate level for DFID's Evaluation Focal Point Staff, some from overseas. Places were made available to external participants and some twenty attended from across public and private organisations across Europe.</p>
<p><b>13. Forthcoming key events/conferences</b> – dates, location</p>	<p>The Society held its 2013 conference on 17<sup>th</sup>/18<sup>th</sup> April 2013 in London. It is expected that a conference will be held in 2014, subject to agreement by Council.</p> <p>The UKES London regional network is planning four workshops in 2013; Economic Evaluation May; Experimental Methods, July; Systems evaluation September; 'New' Technology in Evaluation, November.</p>
<p><b>14. Name and e-address of person submitting this information</b></p>	<p>Derek Poate, Past President <a href="mailto:cdpoate@gmail.com">cdpoate@gmail.com</a></p>
<p><b>15. Date of this update</b></p>	<p>25 April 2013</p>

## II. Experience with Evaluation Capacity Building

<p><b>1. Background:</b> Please provide a brief history of the formation of this organization (VOPE).</p> <p>1.1 Who were/are the key players?</p> <p>1.2 How many members do you have on your governing board/ committee?</p> <p>1.3 What are the main existing strengths that your VOPE is trying to capitalize on?</p> <p>1.4 What are the main challenges that your VOPE is trying to address?</p>	<p>1.1 Formed in 1994 by, amongst others, Elliot Stern, Janet Lewis, Helen Simons, the Society was set up to acknowledge and develop a platform for the growing development and discussion of the field of evaluation. Many of the early evaluators were from academia and independent organizations that had a specific evaluation role. Much of the early theory of programme evaluation was written by academics. Educational evaluation was prominent as there was a large investment in innovative education programmes at that time. But gradually the field extended to include other professional areas (e.g. health care and the police) and evaluation that served a multiplicity of purposes e.g. policy development, NGO evaluation, institutional evaluation, management. The nature of the membership changed to reflect this and now includes evaluators from the private and public sector, private consultants, voluntary organizations.</p> <p>Key contributors to the Society include past Presidents (Elliot Stern, Nick Tilley, Murray Saunders, Helen Simons, May Pettigrew, Mark Bitel, Ian Sanderson, Helen Morrell, Derek Poate) and others from government departments and regional groups. Current key members are the President, Colin Jacobs; Vice President Elizabeth Robin; and Beverly Bishop, who edits 'The Evaluator'.</p>
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	<p>1.2 Total of 15, of which 5 hold offices and 10 are Council Members</p> <p>1.3 UKES has strengths in the breadth of membership among government agencies, academia and the private sector. It includes members from the commercial sector, academics, NGOs and governments and this is reflected in the membership of Council. In the past the Regional Network membership was a major feature but that is currently less prominent. Links are also being sought with professional groups e.g. health and the environment and special interest groups, though these have yet to develop. Members with an interest in international development are particularly active and the Society has a close working relationship with the UK Department for International Development.</p> <p>1.4 Continuity and growth of membership is an ongoing challenge that has been adversely affected by the economic recession. The Society also wants to reinvigorate the regional networks and this has already started in two regions</p>
<p><b>2. Organizational motivation:</b> What were/are the driving forces of the VOPE and its historical development?</p>	<p>The UK government was an early champion of performance management in the public sector and there is a tradition of academic interest in the quality and effectiveness of programmes in the social sectors. The creation of UKES was an opportunity to bring together people with common interests from diverse sectors and backgrounds.</p>
<p><b>3. Evaluation Capacity Building:</b> What has your VOPE done to promote evaluation (M&amp;E) capacity?</p>	<p>1 Through the regional networks, UKES has promoted practical workshop evaluation training, advanced seminars on the theory of evaluation, panel discussions with leading international evaluators in the field and evaluation exchanges of problems and shared advice and support for practicing evaluators.</p> <p>2 Capacity training has also been developed through the practical workshops held before each Annual Conference.</p> <p>3 Training events and publications have a strong orientation towards both individual and institutional capacity.</p>
<p><b>4. Context / target entities:</b> More specifically, who are the persons or institutions your organization seeks to influence (to strengthen evaluation capacity)? For example:</p> <p>4.1 Technical capacities to <i>supply</i> quality evaluations, partnering with experts, local universities or others to provide training for members, etc.;</p> <p>4.2 Strengthening VOPE organizational capacity itself;</p> <p>4.3 Enhancing the enabling environment for evaluation, including strengthening the <i>demand</i> for and use of evaluations by policy makers;</p> <p>4.4 Influencing governmental policies related to evaluation, evaluation designs and implementation of M&amp;E systems, etc.</p>	<p>4.1 UKES takes a broad view of target people and institutions:</p> <ul style="list-style-type: none"> <li>• Government departments</li> <li>• Regional entities</li> <li>• Local Government</li> <li>• Charities and the third sector</li> <li>• Non-governmental organisations</li> <li>• Consultants working in the UK and overseas</li> </ul> <p>4.2 George Bramley and Geoff White are leading on developing the membership of the Society. In 2012 they developed a new charging structure and offer by modeling different scenarios. This resulted in:</p> <ul style="list-style-type: none"> <li>• A discount offer for individual members over two years.</li> <li>• Reduced fee for institutional members and revised extended offer</li> <li>• Identification of targets.</li> </ul> <p>Kelly Beaver is leading on the development of the communication strategy in partnership with Andy Parkinson (moderates Linked in group) and Helen Simons, in wide consultation with members, has produced an Evaluation Capabilities Framework for the Society. This sets out the reasons for and contexts of use of such a framework. It has three main elements– Knowledge and Skills, Professional Practice and Attitude and Dispositions.</p> <p>Election of members to Council from a wide range of policy and practice environments.</p>

	4.3 Making links with government departments, including commissioners on panel discussions and in conference events, arranging joint events with government departments.
<b>5. Public accountability:</b> Is your VOPE helping to strengthen oversight and transparency of government programs? If so, in what ways? Can you share any success stories of evaluators or others promoting public accountability?	The Society supports the principles of good oversight and transparency of government programmes, but is independent of government action.  Principles of independence and commitment to public accountability are emphasized in both the UKES Guidelines for Good Practice in Evaluation and the UKES Evaluation Capabilities Framework
<b>6. More specifically, what are some of the key themes for which you advocate?</b> For example, are you promoting issues related to cultural sensitivity, equity, social justice, empowerment, transformation, gender, environment, poverty? If so, please describe or attach relevant documents.	UKES does not lobby or advocate in respect of a particular issue, instead it concentrates on the benefits of evaluation to support public programmes.
<b>7. Methods:</b> Experiences in strengthening skills of individual members, by (for example): <ul style="list-style-type: none"> <li>• organizing workshops led by local experts;</li> <li>• organizing webinars with international speakers;</li> <li>• designing and delivering e-learning programmes;</li> <li>• administering mentoring programmes; etc.</li> </ul>	a) Historically, the UKES Regional Networks have organized workshops with a strong emphasis on skills development. These may be lunch-time, half-day or whole day duration. b) Regional networks have also arranged advanced theory and practice seminars with leading national and international evaluation experts c) The London Network holds an evaluation ‘clinic’ session most years for practitioners to share problems and discuss approaches. d) In advance of our annual conference we usually hold a day or half-day of workshops designed to share and explain aspects of methodology. e) UKES has run a number of short events for DFID aimed at ‘intermediate’ level training for staff. These are generally open to both non-government and non-UKES participants.
<b>8. Standards:</b> Has your VOPE developed professional standards/ ethical codes/ competencies (or adheres to those developed by others)? If so, please provide documentation.	a) In 2003 the Society published ‘Guidelines for Good Practice in Evaluation’. It examined all the ‘standards’ and ethical documents developed by others and decided to take a different track, producing guidelines from the problems evaluators had experienced in the field. The Guidelines are practical and are arranged in four sections – guidelines for Evaluators, Commissioners, Participants and Institutional self-evaluation.  b) In 2012, the UKES Evaluation Capabilities Framework was published. This examined sets of competencies developed by other societies in the past few years, but has chosen the title Capabilities to reflect a broader intent and range of uses. It has three main elements Evaluation Knowledge and Skills, Professional Practice and Qualities and Dispositions. Both documents are available from the UKES website.
<b>9. Job opportunities:</b> Do you share employment/ consultancy opportunities with evaluators on your database?	Yes, the UKES website provides a space for both Job adverts and contract tenders. Placement is free to members; a small charge is levied for non-members.
<b>10. Progress and results:</b> What progress has been achieved so far in any of the above or other domains? What are expected and unexpected results achieved?	It is difficult to describe progress as past strategies have not been expressed as clear objectives. We regard it as a success that interest in the society remains strong and we get a good turnout for our conferences. One area that might be described as an unexpected result is the lack of consensus around a need to support professionalization of evaluation, which divides the membership.
<b>11. Lessons learned:</b> Recommendations/tips to others for good practices on how to organize and sustain VOPEs like yours.	Maintain regular contact with members; involve normal members in working groups- do not leave all to Council members; ensure all Council members have active portfolios; Council to maintain strong links with Regional Groups; regional groups to share training and seminar events and workshop leaders.
<b>12. Next steps:</b> What does your	At present our main aim is consolidation of the membership and support to

organization plan to do next?	reinvigorate the regional networks. We are likely to hold a strategy day sometime later in 2013 or early 2014 when plans will be reviewed.
<b>13. Willing to share with other VOPEs?</b> For example, would you be interested in forming peer-to-peer partnerships with one or more other VOPEs to share lessons learned, advise each other? If so, describe what you would be willing to share / advice you would seek.	Yes UKES would be willing to share ideas about evaluation training, ethics, setting up of regional and interest groups, governance arrangements, conference planning etc.
<b>14. Suggestions:</b> What ideas do you have for what should be included in activities of the EvalPartners Initiative?	Through UKES's partnership with DFID, the Society has good experience of supporting evaluation initiatives in developing countries. UKES would be interested in building on that experience through partnerships and similar activities.
<b>15. Want to be actively involved?</b> Does your VOPE want to be actively involved in EvalPartners? If so, in what ways?	Possibly, depending on what opportunities arise.
16. Would you be willing to write up a case study providing more detailed analysis of your VOPE's experiences?	Yes