

UK Evaluation Society Annual Report 2016



contents

Introduction	3
Treasurer's Report	4
Professionalisation Initiatives:	5
Pilot of a Voluntary Evaluator Peer Review (VEPR) system for UKES	5
Revision of UKES Guidelines for Good Practice in Evaluation	6
Evaluation Training and Development – developing capacity and capability	6
Collaboration with other Institutions	7
UKES response to consultations in 2016	8
Conference 2016	9
Overview of regional network events	9
Communications	11
Evaluation of Sustainable Development Goals (SDGs)	12
Representation at Events	12
Annex 1: List of 2016 Council Members	13
Annex 2: List of Institutional Members	13
Annex 3: Accounts years ending December 2015 and December 2016	14

introduction

WELCOME TO OUR SECOND ANNUAL REPORT, which covers major UKES activities in 2016. I would like to thank everyone in the Society and on Council for all their efforts in helping to realise these. With such activities, and others that are on-going, we have continued in our quest to promote new thinking about evaluation and to be seen as a national professional voice for advice and guidance on evaluation policy and practice.

Our key achievements in 2016 were:

- A successful **pilot of our Voluntary Evaluator Peer Review (VEPR) process**, which included two workshops to gain feedback on the experience as well as the process itself. Follow-up work is now in hand and we hope to conduct an extended pilot in 2017.
- The production of our first **Annual Report** which covered calendar year 2015. We plan to produce these annually from now on and your feedback on content, format and style is welcome.
- An exciting **conference in April 2016** on the theme of building a culture of evaluation which drew the largest number of delegates in recent years. The sub theme of *unpacking complexity* resonated with many and resulted in excellent discussions over the two days.
- Contributing to the **'refresh' of the Magenta Book**, the Government guidelines for conducting evaluation. This is on-going as the project has been delayed due to illness of the lead person.
- Reviewing our **strategy** for the future following which we agreed 4 key areas on which to focus over the next few years – finance & membership, professional development, communications, and consultation. This will help define roles for Council members, both individually and in terms of leading working groups.
- Two active **networks** in London & South-East England and South West England which have continued to organise a number of events and training courses. The Scotland and North East England network was launched mid-year and work began on re-establishing a Midlands network.
- Work on **updating the Guidelines for Good Practice in Evaluation**. This included a session at the April conference and a survey of members to elicit feedback and ideas. The revised guidelines will be available in 2017.
- Maintaining a good mix of **Council members** from different sectors and with different evaluation expertise. All the Council members whose term ended in 2016 applied for re-election and were successful. We recruited a new Vice President, Julian Barr, who will take over from me at the end of 2017, and welcomed two new members, Andrew Berry and Stephen Morris, as well as co-opting a previous President, Murray Saunders.
- Preparing for the **Annual Conference** which will be held on 10-11 May 2017 and once again at the Holiday Inn, Regents Park. The theme is *Use and Usability of Evaluation: demonstrating and improving the usefulness of evaluation*. Our introductory keynote speaker was booked early on and we received more than 80 abstracts so have been able to put together an excellent programme. More detailed guidance was also prepared for presenters and for those wishing to submit full papers of their presentations.

Further information on our activities during 2016 is provided in this report. All your contributions to the aims and goals of UKES are very much appreciated. I would like to thank members who have selflessly given their time to help make the Society what it is, but for the Society to really thrive and prosper it needs more people to contribute to its work. This can take the form of writing articles for *The Evaluator*, providing content for the website, delivering training and seminars, hosting events, providing mentoring, exchanging ideas and taking part in debates. We need members to evangelise the value of evaluation in the public sphere, to proudly proclaim they are evaluators and to identify and encourage other individuals and organisations who would benefit from becoming members. We can always do with more hands to further activate development of the Society and members are welcome to become involved at any time.



Elizabeth Robin
President 2015-2017

treasurer's report

LAST YEAR SAW THE INTRODUCTION by the Society of an annual report on how it uses members' funds and the activities it undertakes to promote evaluation and the professional development of evaluators.

In this period of continued austerity and uncertainty, the UK Evaluation Society, like other learned societies, continues to face a number of challenges. These include how best to grow membership and income, the need to revisit its value proposition and offer to members and wider stakeholders, and how best to support professionalisation and a sense of common identity amongst practitioners, commissioners and academics as evaluators. While the Society continues to invest financially in activities to support these aims, it is the commitment of members who give their time to projects and provide presentations and venues for meetings and seminars that really makes the difference!

This year's report includes accounts for the financial years ending 31 December 2015 and 31 December 2016. The accounts for 2015 show an improvement in income on the previous year due to greater attendance at conference and an increase in the number of institutional members. Operating expenses also increased during 2015 reflecting the need to invest in information technology and activities related to the International Year of Evaluation, resulting in the Society only reducing its operating deficit. In 2016, the Society returned to surplus through a combination of increased income and reduced administrative expenses. This has enabled us to start rebuilding our reserves which, at £44,122, covers both a year's operating costs and some targeted investments to develop our offer to members.

In the coming years, the Society will seek to increase its income from four principal sources; individual and institutional membership fees, the national annual conference and evaluation training. A three year business plan has been prepared which sets out how we plan to do so while continuing to invest in work to support the profession including offering voluntary peer review and the promotion of ethical guidelines and capabilities, and to extend our wider social objectives.

To advance this agenda, UKES should use the opportunity provided by devolution to local government to increase the influence of evaluation by embedding it in the culture of local decision makers and engaging with local communities in response to a more place-based approach to the delivery of public services. There are now real opportunities to work with the combined authorities such as Greater Manchester and the West Midlands to help re-establish evaluation networks in the regions and this will mean working closely with other interested professional groups and learned societies with a shared agenda. The Society has some limited funding available to support regionally focused activities where committed individual members are able to form a network steering group.

At all levels, our challenge to members is to enhance our efforts to increase the income of the Society in the four areas indicated above.



George Bramley
Treasurer 2010-2017

review of the year

PROFESSIONALISATION INITIATIVES

Pilot of a Voluntary Evaluator Peer Review (VEPR) system for UKES

In 2016 the Society pilot tested a voluntary peer review process with a view to establishing it as a regular service for members. Feedback from the 12 volunteers was very positive (see an example in the box below) and a survey of UKES members indicates that there is an interest in the Society extending the trial to a larger group and continuing to develop the approach.

VEPR is a voluntary structured professional practice review¹. Applicants self-assess their capabilities against the UKES capabilities framework and select two or three topics from recent work to discuss with two approved peer reviewers. The reviewers are experienced evaluation practitioners who have undergone a peer review process themselves. For details of the process see <http://bit.ly/2pXkKNw>

The UKES VEPR system differs from designation or credentialing adopted by some evaluation societies. It is also not about training in skills nor a judgement on competency. Its primary purpose is to facilitate regular and personalised professional development through open-ended reflection as opposed to validation of competency against a checklist.

Feedback and responses were gathered from the volunteers in the initial pilot through interviews, a group discussion meeting and feedback questionnaires. All the participants found it valuable for reflecting on their practice and assessing their level of capability on different issues in the process of evaluation, giving them confidence and opportunity to develop professional self-accountability. Common areas for discussion were the practical and political aspects of evaluation, for example, interpersonal relationships and client management. This was particularly the case for those earlier in their career.

Their feedback also indicated the potential of this process for institutional members. Being independent of the organisation's human resource structures, VEPR enables institutional members to engage with, and become part of, a broader international professionalisation agenda to enhance the quality of evaluation. UKES Council plans to extend the trial on a larger scale in 2017.

1. The scheme was originally developed in collaboration with the European Evaluation Society (EES) and pilots were proposed in both societies. The call for volunteers for the EES pilot went out in early November 2016.

THE VIEWS OF ONE OF OUR VOLUNTEERS

VEPR is a **fantastic opportunity** to meet other members of the evaluation community, learn more about reflective practice and share constructive feedback to develop professionally.

My review was with two experienced evaluators with backgrounds in international development and healthcare, which contrasts to my own work in UK economic development. This exposure to different backgrounds is just one way in which the review helped me, including unlocking new ideas on interviewing vulnerable groups and managing different research audiences. I have since **used these new ideas** in my own practice.

I also acted as a reviewer for three other people, each working in different fields and roles, and the sessions were all highly valuable. Importantly, they provide an opportunity to step back and **organise thoughts on a particular topic or issue** and consider the implications for work in practice. On top of this, the reviews take place in a supportive environment of peers experienced in evaluation who can help to progress participants' technical skills. In this way, the VEPR goes above and beyond what internal HR or line management reviews can offer.

I'd wholly recommend the VEPR. To those who are thinking of giving it a try, don't get too caught up about your level of experience or choice of topic. The sessions are not a test of your evaluation knowledge or skills. The **value comes in introducing yourself and your experiences to others and taking the time to reflect**, and the possibilities are endless from there.

REVISION OF UKES GUIDELINES FOR GOOD PRACTICE IN EVALUATION

2016 SAW THE START of the revision of the UKES Guidelines for Good Practice in Evaluation. These were first published in 2003. The revision is taking place in five stages. It was first signposted at the Annual Conference in May when Helen Simons and Georgie Parry-Crooke, co-authors on behalf of UKES of the original guidelines, gave a presentation titled *Doing the right thing and doing the thing right: evaluation ethics and good practice guidance for evaluation today*. They also facilitated a workshop that engaged 60 people in thinking through what ethical issues needed to be considered and revised for each of the groups involved in the evaluation enterprise – evaluators, commissioners, participants and institutions which self-evaluate. These are the groupings in the current guidelines.

Following this (stage two), a survey was sent to all members of the society seeking their views on what needed to change or what further was required in the guidelines to meet the challenges facing evaluation today – challenges, for example, of social media, cultural responsiveness, equity, and fragile contexts. In stage three, Helen and Georgie analysed the survey results and composed a potential redraft, prior to engaging a small working group of members (stage four) to help refine the ‘new guidelines’ further.

This is the current stage and once complete, stage five will be to send the draft revised version to UKES Council and then, once again, to all members for any further refinements. Council will ratify the final version before publication. This is timed for 2017.

EVALUATION TRAINING AND DEVELOPMENT – DEVELOPING CAPACITY AND CAPABILITY

IN 2015 UKES IDENTIFIED the need for a revised training and development strategy and our activities in 2016 focused on developing the processes that will take this forward. These included:

- Piloting a survey with South West Evaluator Forum members (representing UKES members and non-members) to explore their training and development needs against the UKES capability framework. This will inform a wider consultation and our training offer.
- Exploring revisions to membership forms to routinely collect additional background and contextual information including formal and informal training experience, training and development needs.
- Listening to and responding to requests for training and professional development support from our members and non-members, including advertisement of training and development opportunities organised by external partners, members and non-members on our website.
- Developing a specific UKES training offer to support members in developing their knowledge, skills and evaluation qualities in line with the UKES capabilities framework.
- Aligning to Council developments including a review and refresh of UKES’ vision, aims and objectives, and VEPR processes.

Our focus for 2017 is to pilot our training offer, and extend the developments noted above, particularly the advertising of external training on our website, as well as scoping current training provision and demand to inform the development of our Training and Development Strategy.

Keep an eye out for our training – the first course will be delivered on 9 May 2017 and will focus on Theory of Change and Approaches to Impact Evaluation. The second course in the autumn will focus on approaches to economic evaluation (supporting 1.1, 1.2 and 1.3 of the capabilities framework).

COLLABORATION WITH OTHER INSTITUTIONS

Launch event of the Centre for the Evaluation Across the Nexus (CECAN): June 2016.

Is Evaluation Fit for Purpose?

Dr Ulrike Hotopp, UKES Council member and Chief Economist at Simetrica, was one of a panel at the launch event for the Centre for Evaluation Across the Nexus (CECAN) on 14 June 2016. Professor Nigel Gilbert of the University of Surrey, CECAN Director, opened the meeting with Jane Elliott, Chief Executive of the Economic and Social Research Council. The event was chaired by Roger Highfield, Director of External Affairs of the Science Museum and a member of the Royal Society's Science Policy Advisory Group.

Other panel members were **Dame Margaret Hodge MP**, former chair of the public accounts committee of the House of Commons, **Michael Kell**, Chief Economist at the National Audit Office and **Dr David Halpern**, the Chief Executive of the Behavioural Insights Team and Government Adviser on the What Works Centres. The panel responded to a presentation by **Sir Mark Walport**, Government Chief Scientific Adviser.

In his presentation Sir Mark pointed out the challenges that lay ahead, such as changing the behaviour of over 7 billion people to address climate change to avoid the catastrophic decline in ecosystems. To achieve this, policy makers need to know which policies work – the approach has to combine all the sciences, the natural with the social sciences. He challenged the audience to ensure that evidence was clearly summarised and available to policy makers, the need to focus more on prevention of disease and destruction of ecosystems than cure, and clear communication of evidence that combined all relevant sciences. Here social sciences have an important role to play.

Panel members were asked to respond to the issues raised by Sir Mark. **Michael Kell** was rather sceptical about evaluations commissioned by the Government. He thinks these are not seen as trustworthy and independent. A way forward in his view was to have an external body evaluating government policy independently.

David Halpern highlighted the need for randomised controlled trials to ensure robustness of evaluations. These were now more in demand by Government. He saw this as a positive sign, but there was still a need for more honesty about what Government did not know to increase credibility.

Dame Margaret wanted academics to be clearer in their communication, use less jargon and be timelier in their evidence production and bring the insights from different sciences together.

Ulrike Hotopp pointed out there are a lot of studies which are in fact evaluations, even if they are not called that. It was important to synthesise these and bring them to policy makers' attention. CECAN was an important step in the right direction in an area of policy full of complex interactions which did not respect the boundaries of government departments such as environment, water, and food production.

The beginning of a great friendship?

In late 2016, Council member Ulrike Hotopp made contact with the Economic and Social Research Council (ESRC) about potential future cooperation. The ESRC fund research in the economic and social sciences. The definition used by the ESRC is: "Social science is, in its broadest sense, the study of society and the manner in which people behave and influence the world around us." ESRC has funded a number of programmes which are evaluations and most prominently is a major co-funder of the Centre for the Evaluation of Complexity across the Nexus or CECAN (for more details on CECAN see page 8). More information on ESRC can be found at www.ESRC.ac.uk.

ESRC therefore seems a natural partner for UKES. The initial discussions were positive and a meeting was agreed between UKES and ESRC, the Natural Environment Research Council and the newly set up UKRI (UK Research and Innovation) to follow up in more detail. This meeting will be held early in 2017.

Why the NERC and UKRI?

NERC funds environmental science. While most of this is natural science they have also funded the National Ecosystem Assessment, a multi-disciplinary project assessing the state of the UK's environment and its social and economic impact. The environment depends on people's behaviour. Economics, psychology and a number of other sciences are therefore closely linked to the NERC's objectives. Details about NERC's work can be found at www.nerc.ac.uk

UKRI, which is still in the process of being officially set up, will form the new overarching Research Council. This brings together all existing research councils and Innovate UK with the main objective of enhancing cooperation to address the complex research challenges the UK faces in the future. Detail can be found in the Business Case for UKRI on <http://bit.ly/2prMOp2>

UNEG and UNFPA

Following a meeting with members of the United Nations Evaluation Group (UNEG) working group on professionalisation of evaluation, at the European Evaluation Society conference in Maastricht in September 2016, Dr Dione Hills and Professor Helen Simons, both Council members, were invited to contribute to a webinar held on 6 December promoting UNEG's updated (2016) Evaluation Competency Framework. This competency framework has five strands: professional foundations (ethics, norms, standards and knowledge base), technical evaluation skills, management skills, interpersonal skills and promoting a culture of learning for evaluation, with a detailed breakdown of competencies under each heading, for senior, intermediate and officer levels. For more information on the framework see <http://bit.ly/2qjTYX>

As external contributors, Dione and Helen were invited to share their ideas and experience on the role of competencies in the learning and development of evaluators. The UNEG organisers of the webinar were particularly interested to hear about the UKES VEPR (Voluntary Evaluator Peer Review) pilot, while Harry Cummings from the Canadian Evaluation Society, as the other external contributor, described how the evaluation competency framework in Canada is being used as part of a formal credentialing process for evaluators.

Links to the webinar: <http://bit.ly/2pU52m0> and <http://bit.ly/2qhUy18>

Subsequently, Dione was invited to join a reference group working on an evaluation capacity development strategy for UNFPA (the UN Population Fund). This strategy will be framed around three widely agreed dimensions of capacity development: individual, organisational, and enabling environment, and will also be informed by the overarching UNEG approach to the professionalisation of evaluation.

UKES RESPONSE TO CONSULTATIONS IN 2016

Centre for Evaluation of Complexity Across the Nexus (CECAN)

CECAN was introduced to UKES members by its director, Professor Nigel Gilbert, at the 2016 UKES conference. Funded by the ESRC and NERC, and four government departments, the Centre aims to support the development of policy evaluation methods for use in and across the sectors energy, environment and food. These sectors pose a particular challenge for policy makers and evaluators because the 'energy trilemma', loss of biodiversity, climate change, poverty and challenges to health and well-being are entangled in a number of complex ways. The Centre held a launch event in June 2016 (see page 7) and regularly runs seminars with leading evaluators. It also publishes a steady stream of blogs and reports on different aspects of its work at <http://www.cecan.ac.uk/>

Elizabeth Robin (UKES President) is a member of the Centre's advisory group, while Dione Hills (UKES Council member) was successful in obtaining a CECAN fellowship to evaluate capacity building. We aim to keep UKES members informed about any CECAN activities of particular relevance to the wider evaluation community.

Revision of the 'Magenta Book': UK Government Evaluation Guidance

The Cross Government Evaluation Group (CGEG) agreed last year to revise the 'Magenta Book', which forms the basis of the guidance offered to all government departments and other users on evaluation principles and practice, primarily for the evaluation of policy. UKES was asked to provide a commentary and initial observations specifically on a draft evaluation taxonomy and it was designed as rapid feedback. This work began in May 2016 and is ongoing. We provided a 2000-word response which was aligned to other critical commentaries.

The UKES group (which comprised several Council members²) appreciated the difficulties associated with designing an overarching framework and that the document was a starting point and open to development. However, overall the group could see some fundamental problems in adopting the taxonomy as it then stood. The feedback was detailed and considered. The first question raised by members of the group concerned the desirability of a taxonomic approach. This is a 'first order' question and addresses the best way of framing the world of evaluation and evaluative practice to non-specialists. There may be different ways of doing this which are straightforward and do not beg the kinds of questions that the present taxonomy asks. The distinctions between frameworks, approaches and data collection techniques were not clear or transparent enough and did create ambiguity.

Our commentary was well received and corresponded with other critical observations, including from CECAN. The rethinking suggested by the UKES group was taken on board by the governmental team, particularly on the suitability of a taxonomic approach.

2. Kelly Beaver, Bev Bishop, George Bramley, Stefano D'Errico, Bob Picciotto, Derek Poate, Elizabeth Robin, Helen Simons and Murray Saunders

Although CGEG planned to complete the revision in 2016, the work had to be postponed because of internal governmental issues and will be taken up again in the first half of 2017, at which time UKES will be asked to re-engage with the next iteration.

CONFERENCE 2016

The theme of the 2016 Annual Evaluation Conference was *Building a Culture of Evaluation: Challenging assumptions, unpacking complexity, championing change*. The conference theme resonated with many in the evaluation community and was very well attended as a result with the highest number of delegates in recent years. Given the unexpected political changes which occurred later in 2016, it was also highly relevant to the changing world in which we live. We had three excellent keynote speeches which covered completely different topics:

- Professor Nigel Gilbert, from the University of Surrey, spoke about evaluating complexity and the establishment of the new Centre for Evaluating Complexity Across the Nexus (CECAN)
- Dr Beatriz Garcia, from the University of Liverpool, focused on the evaluation of culture, including such high profile events as the Olympics; and
- Claire Hutchings, Head of Programme Quality at Oxfam, examined real world complexities and, in particular, evaluation and the Sustainable Development Goals (SDGs).

The conference was attended by 194 delegates. 44 oral presentations were given in 23 parallel sessions, selected from submitted abstracts. 15 posters were displayed and judged by an assessment panel, with the prize for best poster being awarded to Thabisile Zuma from the Department of Planning, Monitoring and Evaluation, Republic of South Africa for her presentation on *Building a culture of evaluation in South Africa*. The prize for best paper went to Gordon Freer, Associate – Monitoring and Evaluation at WYG, for his work on *The Keystone Node Approach: Conducting theory based evaluations of complex programmes*.

OVERVIEW OF UKES REGIONAL NETWORK EVENTS

London and South East Network

The **UKES London and South East Network** had another successful year in 2016. It organised a one-day evaluation training session on Qualitative Comparative Analysis (QCA) and a two-part training session on Process Tracing. These training sessions were all led by Dr Barbara Befani, an evaluation methodologist specialising in impact studies and causal inference strategies. The first Process Tracing day introduced attendees to the method, while the second was designed to focus on its application through group work and practical examples. In the event the follow-up day was moved to early 2017. Both the QCA and Process Tracing day were well attended and received.

In May, to further its international connections, the Network hosted an early evening seminar on Developmental Evaluation. This was led by Kate McKegg, a former convenor of ANZEA, the Aotearoa New Zealand Evaluation Association, who also works internationally and has collaborated with Michael Quinn Patton. (For more information, see *Developmental Evaluation Exemplars: Principles in Practice* (2015) edited by Quinn Patton, McKegg and Weihipeihana). Kate gave a most interesting seminar which took attendees through the theory and practice of Developmental Evaluation showing how we could respond to the complexities and dynamic changes that are taking place in the contexts in which we evaluate today.

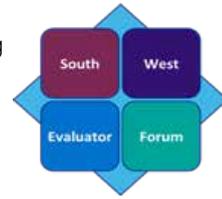
A second early evening seminar held in June and led by Elliot Stern (Emeritus Professor of Evaluation Research at Lancaster University, Editor of the journal *Evaluation* and past President of both the UK and European Evaluation Societies), was titled: *Why are we obsessed with impact evaluation?* To address this question, Elliot discussed contemporary thinking on impact evaluation and how it has evolved in recent years. He also explored what impact evaluation could offer to the sustainable development goals 'agenda', as an example of the challenges in evaluating any complex, unpredictable and interconnected system.

Participants at both seminars included evaluation practitioners and commissioners, all of whom were very engaged in the sessions, which generated a lot of questions and dialogue.

The Network's forward plans for 2017 will continue to include evaluation seminars and training sessions. For further information, see UKES London and South East England Network flyer on the UKES website and/or contact Georgia Iacopini at g.iacopini@tavinstitute.org

South West Evaluator Forum

The South West Evaluator Forum (SWEF) celebrated its two year anniversary in September 2016. To mark this occasion, the Forum held a “Celebrating Success and Moving Forward” event in October. This consisted of a mixture of presentations and workshops with a focus on celebrating success, sharing learning and identifying priorities for the forthcoming year. The event was well received, with excellent presentations from Andrew Rix (Independent Research and Evaluation Consultant) on his ‘Rigour and Relevance’ model; Helen Seers (Research and Evaluation lead of Penny Brohn UK) on their work on *Realising the Value* of what they do; and Pam Moule (Professor for Health Research – Service Evaluation, UWE) on the local evaluation landscape in the South West. The workshop discussions informed a draft Action Plan 2017-19, which focuses on improving SWEF’s (and UKES’) visibility, engagement, reach and impact.



Achievements for SWEF in 2016 have included:

- completing the co-production of *Guidelines on Patient and Public Involvement (PPI) in Evaluation*. (This work emerged from SWEF’s successful bid to UKES in 2015 for funding to mark the International Year of Evaluation)
- continuing to steadily increase membership
- developing our own logo
- enhancing communication mechanisms with our members through the introduction of Twitter, MailChimp and testing a pilot online network using JISCMail, and, in collaboration with lead partner NIHR CLAHRC-West, enhancing our community of practice
- continuing to provide our members with opportunities to share success, challenges and learning, and to network and seek peer support.

This year also saw a change in coordination of the Forum which is now being shared between Avon Primary Care Research Collaborative and a long-standing member, Bristol Health Partners.

Plans for 2017 will be informed by the Action Plan noted above. We aim to continue to grow the SWEF (and UKES) membership base by improving our visibility, enhancing our networks and continuing to provide the valued peer support and learning forum. This will be through activities such as testing new ways to enhance our community of practice by being part of an online network, developing communication and dissemination plans for our *PPI in Evaluation Guidelines*, and increasing our social media presence and activity.

See <http://bit.ly/2pU6Qv4> for further information.

Scotland and North East England Network

The inaugural meeting of the **Scotland and North East England Network** was held on 29 June 2016, hosted by the British Council in Edinburgh. There was an excellent attendance with over 40 participants. The first half of the event featured a presentation by Alison Girdwood from the British Council on *Increasing the Profile of and Demand for M&E – experience in two different contexts* followed by Q&A. The second half involved networking and a discussion on what participants would like to see from the network. The organisers came away with some good suggestions as well as a number of offers to host future meetings.

In September, the network took advantage of the fact that Helen Simons, Professor of Evaluation and Education at the University of Southampton, was visiting Edinburgh, to hold a ‘fireside chat’ on case study evaluation. This was hosted by WYG and, after a few opening thoughts from Helen, was primarily a Q&A on the issues we still need to grapple with in case study evaluation. Again, it was well attended with good discussion.

A third meeting planned for October had to be postponed due to illness of the presenter. This has now been rescheduled for 2017. For further information contact Christiane Kerlen at info@kerlen.de

One positive outcome of the June meeting was the establishment of a Glasgow group of evaluators which meets regularly every two months for a lunchtime discussion.

Midlands

An initial approach has been made by the Treasurer to prospective members to establish their interest in establishing a UKES network in the Midlands. This has resulted in individuals stating their support for a network. The next step is to establish a steering group and form alliances with other analytical networks in the region.

COMMUNICATIONS

The Evaluator

The Spring 2016 edition of *The Evaluator* focused on a wide range of evaluation events – local, national and international; activities to further inclusive and professional evaluation; and contributions to policy – which took place as part of the 2015 International Year of Evaluation. Reports of these activities in *The Evaluator* included those resulting from the UKES' small grants competition; UKES regional network events; and UKES representation at international events.

The small grants events covered the exploration of the possible interface between evaluation and social research, a seminar on realist evaluation for health and health-related professional practice, and PPI 'Patient and Public Involvement' in evaluation. There was also a report on the Evaluation Week in Wales organised by the Welsh Government and an article on a series of lunchtime events run by the Tavistock Institute on the *Dynamics of Evaluation*.

Also included were brief updates on the Voluntary Evaluator Peer Review pilot and the UKES training strategy, and a summary of UKES' recent engagement with policy makers.

The 2016 conference edition of *The Evaluator* (published in early 2017) focused on the conference theme of *Building a Culture of Evaluation* and contained articles chosen to demonstrate the breadth of treatment given to this theme. At the international level were papers titled *The Confused Past and Uncertain Future of Evaluation in the European Commission* and *The Case of the Darwin Initiative*; in different national contexts were *Development of a Circular Economy in Wales*; *The Messy World of Brand Evaluation in Rwanda* and *Building a Culture of Evaluation in South Africa* (the poster prize winner); at the sectoral level *Evidence-based Policing* and at Departmental level *Building a Culture of Evaluation at the Department of Transport*. It also contained a summary of Nigel Gilbert's well-received keynote address on the relationship between complexity and evaluation, and a description of the 'keystone node' approach, a promising new approach to exploring the key assumptions of theories of change within a development context (which also won the best paper prize).

UKES Annual Report

In April 2016 we published our first annual report which covered activities in calendar year 2015 and abbreviated accounts for 2014. The report was produced in hard copy and included in delegate packs at the 2016 annual conference. It is also available on the website here: <http://bit.ly/2prKm1T>

We will continue to produce such reports but from now on, they will only be available electronically via the website.

Website

The new website, launched at the end of 2015, was reviewed at the end of 2016. The new design is clean (ie user-friendly and uncluttered) and the focus has moved to content to ensure that the website is one that members value and visit. Work has commenced on increasing the amount of UKES content on the website, including access to annual conference materials, links to partner conferences and to UKES social media. This work will continue in 2017.

However, more evaluative content from members would be appreciated to enhance the website's usefulness. For example, copy from members on inspiring papers or books on evaluation they have recently read, book reviews, think pieces to challenge evaluative thinking or reports on useful evaluation workshops and conferences attended, would all be welcome. As would members' views on what else they would like to see on the website.

E-bulletin

E-bulletins were circulated to members regularly throughout the year. These contain latest news, information on current consultations, invitations to complete surveys, updates on the annual conference and network events, and notifications of tender opportunities and evaluation jobs.

Members are encouraged to submit contributions for both the website and the e-bulletin.

EVALUATION OF SUSTAINABLE DEVELOPMENT GOALS (SDGs)

Effective Evaluation for the SDGs

In September 2015, the Sustainable Development Goals (SDGs) were adopted by world leaders together with an agenda for 2030 which puts great emphasis on accountability and learning systems at the global, regional and national level to make governments accountable and feedback lessons learnt to accelerate implementation of the SDGs. A true collaborative effort is required to turn aspirations into realities, and evaluators are also called to contribute. Unlike the Millennium Development Goals, the SDGs Agenda also recognises that evaluation processes will play a key role in these systems and processes. UKES has played a leadership role in advocating for effective evaluation for the SDGs through the engagement of its Council Members in EVALSDGs' network and a variety of events and initiatives. Two of these are outlined below, and another two are covered in the Events section.

Panel Session at UKES Conference: at the 2016 conference, we organised a plenary session to give monitoring and evaluation professionals a safe space to discuss what evaluation could offer to Agenda 2030 and how to address complexity in the assessment of the SDGs.

Briefing papers on effective evaluation for the SDGs: the briefing series *Effective evaluation for the SDGs* is produced collaboratively by the International Institute for Environment and Development (IIED) and EVALSDGs and aims to promote effective conduct and use of evaluation in SDGs implementation, follow-up and review. Five briefing papers have been produced and two of these have become the most downloaded IIED publication in the whole of 2016, with over 2,500 downloads. The series has been appreciated by both senior officials working for national and local authorities as well as by practitioners in the field.

Stefano D'Errico, UKES Council Member, is the project lead and one of the authors of the briefing series.

REPRESENTATION AT EVENTS

UN High Level Political Forum event: June 2016

In June 2016, UKES Council member Stefano D'Errico, in collaboration with EvalSDGs, UNDP and UNICEF, organised an event on Evaluation Service for Future Reporting at the UN High Level Political Forum. The event brought together staff from ministries, parliamentarians, UN officials and evaluators to advocate for a greater role of evaluation in follow-up and review processes of the SDGs.

Wilton Park event: December 2016

Professor Helen Simons and Stefano D'Errico, both of whom are Council members, were invited to attend a meeting on 12-14th December 2016 at Wilton Park on *Tracking development progress and evaluating development partnerships in the post-2015 era*. The meeting was co-organised by former UKES Council member, Bob Picciotto and Rob van den Berg, President of IDEAS, with Wilton Park. Bob also contributed an introductory paper. The event brought together a diverse cohort of stakeholders from across the world including evaluators, members of national governments, and representatives of the private sector to identify key challenges and opportunities in developing partnerships and the use of evaluation to accelerate the implementation of the Sustainable Development Goals (SDGs).

It was recognised at the meeting that with 17 goals and 169 targets, the SDGs are aspirational and their implementation depends on what can be done at national and local levels, responsive to the context and culture of each country. Not all indicators will be equally relevant to each country, or equally possible to achieve.

The second day was devoted in part to discussion in five groups: ethics, governance, models and methods, diversification and digitalisation. Each session had two primary leads: in the ethics group Helen focused on the ethics of practice while the other key lead drew attention to the ethics and values we need to address through the SDGs for the next generation.

Two further significant issues which arose from the plenary discussions were: the need to pay more attention to human rights to ensure no one is left behind; and the need to develop further and different approaches to evaluation (where monitoring would be a key element locally and globally but other methods of documenting and evaluating progress and effects of implementation would also be needed).

ANNEX 1: LIST OF 2016 COUNCIL MEMBERS

OFFICERS

President

Elizabeth Robin

Vice President

Julian Barr

Immediate Past President

Colin Jacobs

Secretary

Kelly Beaver

Treasurer

George Bramley

COUNCIL MEMBERS

Bev Bishop

Stefano d'Errico

Emma Gibbard

Alison Girdwood

Kari Hadjivassiliou

Dione Hills

Ulrike Hotopp

Mark O'Brien

Robert Picciotto

CO-OPTED MEMBERS

Derek Poate

Murray Saunders

Helen Simons

Thanks to Bob Picciotto who stood down from Council during the year.

A welcome to Alison Girdwood, Murray Saunders, our new co-optee, and Julian Barr, who was successful in becoming Vice President during the year.

Following the regular Council elections at the end of the year, we will welcome two new members in 2017, Andrew Berry and Stephen Morris.

Process for Council Membership

UKES has a policy on Council Membership, which includes details of the roles and responsibilities associated with membership as well as the criteria required. A copy of the policy can be found here: <http://bit.ly/2qiiCRm>

Nominations for places on Council open at conference each year and applications are accepted until the end of October. This allows members sufficient time to consider their application, secure a proposer and seconder, and submit the required documentation. Applications are reviewed to ensure that they meet the criteria for membership and, if more applications are received than there are vacancies, an election is held.

ANNEX 2: LIST OF INSTITUTIONAL MEMBERS

Australian Council for Educational Research

Bank of England

Big Lottery Fund

Bond

CAG Consultants

Comic Relief

Department of Energy and Climate Change

Department for International Development

Department for the Environment, Food and Rural Affairs

Ecorys UK

Health and Safety Executive

Heritage Lottery Fund

ICF International

International Institute for Environment and Development (IIED)

Ipsos MORI

ITAD Ltd

London School of Hygiene and Tropical Medicine

M-E-L Research Ltd

Mott MacDonald Ltd

Oxfam GB

Oxford Policy Management

Plan UK

Scottish Enterprise

Sport Wales

SQW

The British Council

The Tavistock Institute

Technopolis Ltd

University of Essex

Voluntary Services Overseas (VSO)

Westminster City Council

WRAP

WYG International

ANNEX 3: ACCOUNTS YEARS ENDING 31 DECEMBER 2015 AND 2016

The Society's financial year runs from 1st January to 31st December. The Society operates as a limited company with the Society Officers (President, Vice-President, Secretary, Treasurer and Past President) registered as its company directors. The Society is required to submit its annual accounts to Company House before October the following year.

THE UK EVALUATION SOCIETY (UKES)

DETAILED TRADING PROFIT AND LOSS ACCOUNT AND EXPENSES SCHEDULE FOR THE YEAR ENDED 31 DECEMBER 2015

	2015		2014	
	£	£	£	£
Sales				
Conference & Training		53,718		33,096
Membership income		20,567		17,223
Bursary Receipt		-		5,000
		<u>74,285</u>		<u>55,319</u>
Administrative expenses				
Administration	12,310		12,856	
Insurance	707		780	
Postage	778		973	
Printing	5,681		6,284	
Computer costs	7,312		790	
Conference & events	56,043		54,703	
Council expenses	5,174		2,594	
Accountancy	1,200		1,2	
		<u>89,314</u>		<u>80,280</u>
Operating (loss)/profit	20%	<u>(15,029)</u>	45%	<u>(24,961)</u>

THE UK EVALUATION SOCIETY (UKES)
 DETAILED INCOME STATEMENT YEAR ENDED 31 DECEMBER 2016

	2016	2015
	£	£
Turnover		
Conference & Training	60,060	53,718
Membership Income	16,892	20,567
	<u>76,952</u>	<u>74,285</u>
Gross profit	76,952	74,285
Gross profit percentage	100%	100%
Overheads		
Administrative expenses		
Administration	(11,065)	(12,310)
Insurance	(679)	(707)
Postage	(464)	(778)
Printing, postage and stationery	(3,005)	(5,681)
Computer costs	(1,146)	(7,312)
Conference & events	(51,397)	(56,043)
Council expenses	(3,285)	(5,174)
Accountancy fees	(1,300)	(1,200)
Bank charges	(103)	(109)
	<u>(72,444)</u>	<u>(89,314)</u>
Operating profit/(loss)	4,508	(15,029)
Operating profit/(loss) percentage	5.9%	20.2%
Profit/(loss) before taxation	<u>4,508</u>	<u>(15,029)</u>



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