



UK Evaluation Society Annual Report 2017

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Contents

Summary	4
Treasurer’s report	6
Review of the year	7
Business Plan.....	7
Task and Finish Groups	8
Value Proposition Group.....	8
Communications and Marketing Group	9
Membership Group.....	10
Training and Development Group	10
Professionalisation Initiatives	11
Voluntary Evaluator Peer Review	11
Revision of UKES Guidelines for Good Practice in Evaluation	11
UKES Evaluation Capabilities Framework	11
Collaboration with Other Institutions.....	12
Building relationships with the What Works Centres and the Cross Government Evaluation Group	12
Centre for Evaluation Across the Nexus	12
Academy of Social Sciences	14
UKES Response to Consultations in 2017	14
Update on UKES involvement with the revision of the Magenta Evaluation Guidance	14
Conference 2017.....	15
UKES Regional Evaluation Networks.....	17
London and South East Network	17
South West Evaluator Forum	18
Evaluation Network Scotland.....	18
<u>Glasgow Evaluation Group</u>	18
Midlands Regional Network.....	19
Communications	19
The <i>Evaluator</i>	20
E-bulletin	20

Website	21
Representation at Events.....	21
ANNEX 1: LIST OF 2017 COUNCIL MEMBERS.....	24
ANNEX 2: LIST OF INSTITUTIONAL MEMBERS.....	26
ANNEX 3. SUMMARY OF BUSINESS PLAN 2017-2019.....	27
ANNEX 4: ACCOUNTS YEARS ENDING 31 DECEMBER 2017	30

Summary

WELCOME TO THE THIRD ANNUAL REPORT produced by the UK Evaluation Society. This reports on the major UKES activities during 2017. It was a busy year, with a strong focus on actions that will enable the Society to better support its members. My thanks go to colleagues in Council for their contributions to these initiatives. I would like to thank all the members of the Society for their continued support, and I hope we can continue to build on the level of interaction at Conference, in Regional Networks, and through social media. As shown in our Value Proposition exercise, reported here, we believe that our conference, and training and professionalisation initiatives do provide direct and valued benefits to members. We look forward to further strengthening the Society's offer in 2018.

Our **key achievements in 2017** were:

- A very successful **Annual Conference** held on 10th and 11th May 2017 at the Holiday Inn Regent's Park. The theme was *The Use and Usability of Evaluation – Demonstrating and Improving the usefulness of evaluation*. We had excellent keynote addresses from Michael Anderson, Professor Lorraine Dearden and Sue Holloway, and two days of very interesting presentations as well as posters and very lively networking amongst the evaluation community.
- An increasing level of activity in the **Regional Networks**:
 - **Evaluation Network Scotland** was established from merging a new UKES regional network and the Scottish Evaluation Network. It held four evaluation forums on: Building Self-Evaluation Capacity; How to become a (better) Evaluator; a Networking Event; and Contribution Analysis.
 - **London and South-East** organised an Evaluation Exchange in September, where participants had an opportunity to discuss evaluation issues in an open forum.
 - The **Midlands Regional Network (MRN)** was officially launched with an event at the University of Birmingham on 7th December 2017. MRN has published its first newsletter which includes an article on the launch event and planned future events.
 - The **South West Evaluator Forum** launched their co-produced guidelines to involving patients and the public in Evaluation, which was original funded by UKES through the EvalPartners International Year of Evaluation.
- Running a sold-out pilot **programme of training events**. This consisted of three half day workshops covering: Introduction to Theory of Change, Introduction to Impact Evaluation and an Introduction to Economic Evaluation.
- Reviewing and consolidating the experience of the **Voluntary Evaluation Peer Review (VEPR)** trial. A parallel session on this was part of the 2017 Conference, entitled: *The challenges of developing a system to develop evaluators' capabilities through a voluntary peer review grounded in reflective practice*. A full report is being drafted as is an on-line Evaluation Capabilities Self-Assessment Tool, to be launched in 2018.
- The Society has developed and strengthened its **links to other organisations** for who evaluation is important. This includes:

- the centres comprising the Government's **What Works Centres** network, who presented at the 2017 UKES annual conference the **Cross-Government Evaluation Group (CGEG)** – a group in government that meets to bring together learning and best practice of evaluation from across government.
- close involvement with the Centre for Evaluating Complexity Across the Nexus (**CECAN**), with two Council members who are a CECAN Fellow and on the Advisory Board respectively
- The **British Academy** and the **Government Social Research Network** held a joint event on policy evaluation in London in July. UKES was invited to participate, and presented its views on evaluation as a profession and on the importance of plural methods in evaluation.

2017 has also been an important year for **activities within Council**:

- A major achievement in 2017 was the production of a three year **Business Plan**. The 2017-2019 Business Plan sets out how the Society plans to cover its operating costs and grow its income to invest in new activities and rebuild financial reserves.
- A number of actions have been taken to achieve the Business Plan targets and ensure the Society meets its objectives, grows, and is financially sustainable. Actions have been delegated to **Task & Finish Groups**, principally composed of Council members.
 - The **Value Proposition** group has developed and tested a set of 'claims' of the benefits the Society provides.
 - The **Communications** group has drafted a Communications Plan to focus efforts on how to improve communications with members.
 - The **Membership** group has revised our Institutional membership fees, and started to develop a revised membership application process to ensure that it is simple and effective.
 - The **Training and Professionalisation** group has piloted a series of UKES training events for early-stage evaluators. This will be further developed into a programme of intermediate-stage training events in 2018. It has also reviewed VEPR and the Capabilities Framework.
- Two **new Council members** were elected (unopposed) to **Council for 2017/18** – Andrew Berry (Andrew Berry Research and Evaluation) and Prof Stephen Morris (Manchester Metropolitan University). Three Council members were re-elected: Dione Hills (The Tavistock Institute; Emma Gibbard (Avon Primary Care Research Collaborative, later Bath University), and Mark O'Brien (University of Liverpool). The process for selecting new Council members for 2018 closed in October 2017. Three new members will join Council next year for the **2018/19 period**, all elected unopposed: Rebecca Adler, LTS International, Laura Hayward, LTS International (elected unopposed), and Pete Welsh, OPM Group.
- **Elizabeth Robin** completed her very successful three-year term of office as UKES President. As well as instigating the Annual Report as a UKES publication, Elizabeth has helped strengthened the profile and activities of UKES, and put in place the necessary measures for the Society to function well. Many thanks, Elizabeth!

Julian Barr
President 2018-19

Treasurer's report

2017 was very much a transitional and busy year for the Society. It involved close monitoring of our financial position against a set of financial sustainability criteria introduced at the end of 2016 and the development of a three year business plan setting out how UKES will grow its income, invest in new activities to support our value proposition and rebuild our reserves. A summary of the business plan is given in Annex 3 of this annual report. The business plan has two sets of targets for 2017 against four income streams. The Society has to increase its income principally from four sources: i) individual membership fees, ii) institutional membership fees, iii) UKES' annual conference and iv) training events. The first set of targets relates to generating sufficient income to cover the operating costs of the Society. A second set of targets were developed that would allow us fund 'special projects' and a small surplus that will help rebuild our reserves. I am pleased to say we met our targets. Our income from membership for the first time covered our operating costs, a year earlier than planned and we exceeded our target surplus for events in 2017. The surplus of £9,658 from the national conference was lower than planned, but given the performance of the other income streams the Society has not had to depend on it this year. Accounts for the financial year ending 31st December 2017 are in preparation and will be appended to this report once finalised and signed off.

The business plan identified a series of actions that Society needed to undertake to be on a firmer footing for the future and a number of time-limited task and finish groups were set up to deliver these actions. I was personally involved in the Value Proposition group which is reported on later in this report. It was interesting to find out what claims fellow Council members thought the society could make and to the extent to which they thought individual claims were relevant, plausible and could be evaluated. Also in this annual report, the leads on each individual task and finish group describe the progress they have made.

Last year, I referred to UKES using the opportunity provided by devolution to local government to increase the influence of evaluation by embedding evaluation 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. London and South East network is thriving and continues to run successful events. I was involved in re-establishing the Midlands Regional Network, which was relaunched on 7th December with Karl King as convenor (see Regional Networks) and participated in an advisory panel on evaluation for West Midlands Combined Authority.

George Bramley

Treasurer 2010-2019

Review of the year

Business Plan

A major achievement in 2017 was the production of a three year Business Plan. The 2017-2019 Business Plan sets out how the UK Evaluation Society plans to ensure financial sustainability and grow its income to invest in new activities and services for members. The Society tries to hold reserves equivalent to two years' operating costs, which are currently £25,600 annually, excluding the delivery of the annual conference. The Society currently has four income streams: individual and institutional membership, the annual conference and any other events (e.g. training). The business plan includes a base scenario in which operating costs would be covered and to allow for 10 per cent variance. The business plan also identifies 'projects' to support the development of the Society's offer to its members and how it works with stakeholders.

An annual budget of £10,000 has been allocated to the following activities: development and launch of VEPR; strategic partnerships (e.g. other learned societies, What Works centres) and membership fees (IOCE and Academy of Social Sciences); development of guidelines and resources (e.g. ethical guidelines, regional network policy and network handbook); development of content for website; and advocacy and outreach. A summary Business Plan is provided in Annex 3.

In summary, achievement against the 2017 Business Plan financial targets are presented in the table below.

Table 1. UKES 2017 Revenue

	2017 Base	2017 Target	2017 Actual
Membership income (Institutional)	£9,600	£14,400	£17,760
Membership income (Individual)	£5,600	£7,700	£12,282
Conference surplus	£10,000	£14,900	£9,658
Events surplus	£3,000	£4,000	£3,340
Other income surplus	£0	£1,000	£0
TOTAL	£28,200	£42,000	£43,040

Task and Finish Groups

The UKES Council has established a number of Task and Finish Groups¹ to help deliver the objectives in the Business Plan. Listed in order of starting their commission, these groups are working on:

- Value Proposition
- Communication and marketing
- Membership
- Training and professionalisation
- Strategic partnerships (this will start in 2018)

Value Proposition Group

One of the barriers to growing the Society and engaging potential members and wider stakeholders has been the lack of a clear message or *value proposition* of what UKES is and what it offers its members², i.e. the benefits members can derive from the Society. Over time, members and those outside the Society formed their own views leading to divergence in views about the role of the Society and its offer to members and the wider community. A Task and Finish Group was established to critically appraise what might be and should be UKES' value proposition. Its membership included George Bramley (lead), Julian Barr, Elizabeth Robin, Colin Jacobs, Tracey Wond and Dione Hills. The group remit included:

- Identify and revisit the claims the Society can make about creating value **directly** for members. How does the Society create value for members, giving them resources and knowledge to do their job better, allowing institutional members to benefit from UKES membership (training, networking, advertising space, job market)?
- How does the Society **indirectly** create value for members and **more widely at a societal level**?
- Differentiate value proposition between individual and institutional members as appropriate

The group adapted an approach developed by George Bramley with NICE Scientific Advice to assess value propositions for new medical technologies being considered for adoption by the health care commissioners. It involved the generation of potential claims that were assessed by the group against the following criteria:

- **Relevant?** Is it clear why potential members and stakeholders should be interested in the claimed benefit? For example does the claim provide a potential solution to a known issue or opportunities not available elsewhere or address a specific priority?
- **Plausible?** Is it clear how the claimed benefit might be generated? Can we clearly and logically set out the reasoning for the claim?

¹ Task and Finish Groups are mainly used in the public sector. They are established with a specific mandate to complete particular tasks in a certain time frame, and then dissolve. As the current UKES Task and Finish Groups complete their assigned tasks, Council will consider whether to give them a permanent status as sub-committees of Council.

² It should be noted that the *value proposition* – the services and support the Society provides to its members - is distinct from the basic *values* of the Society as set out in our Constitution and underpinned by the Society's commitment to democratic values of inclusion, diversity, equity, and accessibility.

- **Evaluable?** Is it possible to test the claimed benefit? To what extent is it feasible to collect evidence to support or disprove the claim?
- **Evidence available?** To what extent is there evidence for the claimed benefit?
- **Is the evidence good enough?** This depended on the nature of the claim being made.

The analysis of potential value claims will be completed in 2018, but indications are that the following claims are valid and evidenced:

- National conference provides an annual opportunity to learn about current thinking and to network.
- Access to seminars and learning events
- Provides a community of practice
- Develops (and promotes?) standards in evaluation competence and ethics
- Membership provides discounts for Annual conference, UKES events and Journal subscriptions

The Society needs to do more to deliver on other claims, such as:

- Membership supports career development and looks good on CV
- UKES ensures that evaluation is recognised as a professional discipline, both within government and more generally

The **next steps** on the Value Proposition are to:

- Identify actions to deliver and/or strengthen the value 'offers', for inclusion in an updated Business Plan.
- Consult members and stakeholders more widely through a planned cross-cutting survey of members, which will include questions on the value proposition, communications, and training..
- Council to agree on the wording of the renewed Value Proposition and consider how it relates to the Society's Constitution and stated aims and *values*.
- Refresh content of relevant documents and website to reflect renewed value proposition.

Communications and Marketing Group

This Task and Finish group was established to understand and improve how we communicate with our members. The Society is inclusive, with many different interests, working in a wide range of sectors, using evaluation in various ways, and possessing varying degrees of knowledge and experience in the field. Our communication with members is not a one-way process either - it needs to be a two-way sharing of news, information, tips and knowledge. If this is done properly, it is one of the most powerful ways we can help our members stay informed with the latest updates in evaluation, and to encourage other evaluators to become members of our professional network.

All of which is why, in 2017, we're delighted to have formed our first Communications Group. The group is led by Andrew Berry and includes Bev Bishop and Julian Barr and others to join from the 2018 Council intake. The target is to finalise a Communications Plan for UKES in 2018. The plan will cover topics including the Society's marketing, branding, website, and use of social media. We recognise that members will have different preferences for how we interact. For example, what would members like to see in the Society's email updates and in the *Evaluator*? What should be

included in a refreshed the website? Do we need to use more social media? We'll be in touch with all members in 2018 with a cross-cutting survey to address these questions and more. If members would like to become involved in the meantime, [there are opportunities to join the communications group](#) to help us develop our plans, so please contact Andrew Berry or Julian Barr for more information. We're looking forward to staying in touch...

Membership Group

At the end of 2017, a Membership Task and Finish Group was established to review membership fees, membership application process and boost membership numbers. The group includes Emma Gibbard (lead), Ulrike Hotopp, Kari Hadjivassiliou, Julian Barr and others to join from the 2018 Council intake.

This year we have revised our Institutional membership fees, following consultation at our AGM in May 2017, to more fairly reflect the size of institutions. We now have a three-tier system for large, medium, and small institutions respectively – the system takes into account the number of people working in different roles across the field of evaluation in an organisation. Our individual membership and student rates have remained unchanged.

We have started to develop a revised membership application process to ensure that it is simple and effective. We have also been considering how we improve our knowledge of our members to help feed into our strategic developments. Ideas have included revising our membership forms, developing online member profiles and enhancing our social media activity. To take this forward we have been working closely with the value proposition, training and development and communications groups. In 2018, we will be undertaking a single cross-cutting survey of members to help us to take this forward.

Training and Development Group

The Training and Development Task and Finish Group have been working towards developing a strategy for the Council to support the delivery of its vision³ by building capability and capacity in evaluation within the evaluation community. The group is led by Emma Gibbard, with Elizabeth Robin, Dione Hills, and Colin Jacobs, plus Derek Poate and Helen Simons focusing on VEPR.

To inform the strategy's development, a small Training and Development Programme was piloted and evaluated during 2017. The programme consisted of three half day workshops covering **Introduction to Theory of Change**, **Introduction to Impact Evaluation** and an **Introduction to Economic Evaluation**. These were popular courses with all 25 places filled and the evaluation feedback is being used to help inform the further training programme for 2018/19.

Going forward, we will use the planned 2018 cross-cutting member survey to conduct a training needs analysis of our members, evaluate the 2018 training programme and use this information to develop a programme that is underpinned by the UKES capabilities framework.

See below for progress on VEPR.

³ <https://www.evaluation.org.uk>

Professionalisation Initiatives

Voluntary Evaluator Peer Review

In 2016 the Society pilot tested a voluntary evaluator peer review (VEPR) process with a view to establishing it as a regular service for members. VEPR is a voluntary structured professional practice review. 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.

In the past twelve months the VEPR sub-committee has been working to extend the trial on a larger scale. To do this we have explored four aspects. Firstly, we have reviewed the guidance for applicants and reviewers to improve clarity and iron out some issues that emerged in the pilot. Secondly, we have held discussions with colleagues from the European Evaluation Society (EES) VEPR working groups to learn from their experiences and share ideas about offering the reviews more widely. Thirdly we have drawn together information from the feedback, workshops sessions and an independent review to prepare a consolidated report about the UKES experience with VEPR. That will be circulated to members and made available on our website.

Lastly we have been exploring the idea to make the self assessment against the capabilities framework, which is part of the review application process, available for members to use to take stock of the breadth and depth of their evaluation knowledge and experience without necessarily having a full peer review. We plan to launch this on our refreshed website in late-2018.

Revision of UKES Guidelines for Good Practice in Evaluation

The UKES Guidelines for Good Practice in Evaluation are currently being revised. These were first published in 2003. As noted in last year's Annual Report, the revision is taking place in five stages. Helen Simons and Georgie Parry-Crooke presented on evaluation ethics at the 2016 Conference, and facilitated a workshop ethical issues faced by evaluators, commissioners, participants and institutions which self-evaluate. Members have been surveyed on revisions needed in the 2003 guidelines to current evaluation challenges. Helen and Georgie have 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. UKES London/Southeast Network have also held events to explore ethical dilemmas and the usefulness of the guidelines. The latest of these took place in September 2017. The revisions have taken a little longer than initially envisaged but should be completed in 2018. Stage five will be to send the draft revised version to UKES Council and then, once again, to all members for any further refinements.

UKES Evaluation Capabilities Framework

The UKES Capabilities Framework was published in 2012 after three years of consultation with members and several reiterations of the structure and precise wording of each capability. It is available on the UKES website. The Framework is divided into three sections: **Evaluation Knowledge, Professional Practice, Qualities and Dispositions** in each of which are a number of specific capabilities it is suggested evaluators need to have. The wording capability was used rather than competency, the word adopted in many competency documents currently being produced by evaluation societies and other organisations with responsibility for evaluation across the world.

Capability was chosen for three reasons. It avoids a mind-set that suggests a tick box approach i.e. you have the competency or you don't. It gives agency to the evaluator to demonstrate and reflect on their capability in the different domains. It allows for a more fluid approach to understand how capabilities are interpreted in practice.

As noted above, the Framework has been used as the basis of **Voluntary Evaluator Peer Review (VEPR)** process engaging evaluators in reflecting on aspects of their evaluation practice in the field. It will therefore also from the basis of the **on-line capability self-assessment tool** which will be made available in late 2018. In 2018, the domains and the precise capabilities within each will be reviewed in line with feedback received, with a view to refining and enlarging the scope of the Framework.

Collaboration with Other Institutions

Building relationships with the What Works Centres and the Cross Government Evaluation Group

Ulrike Hotopp met with the central team that coordinates and works with the What Works Centres (WWCs)⁴ across Government in the Cabinet Office. There are clear common interests with UKES. WWCs are interested in the capabilities framework, the VEPR scheme and the opportunity to network and link up with other networks. We will explore further opportunities for cooperation.

Ulrike attended a meeting of the Cross Government Evaluation Group (CGEG)⁵ and explained to attendees the work of UKES.

There was a lot of interest from CGEG in the UKES capabilities framework and in forging links which in the future allowed networking, exploring new methods in evaluation and the VEPR scheme. As a result of this meeting, it was agreed that Natalia Chivite-Matthews from the Department of International Trade (DIT) and member of CGEG would join the UKES Council to improve links to Government evaluators.

Centre for Evaluation Across the Nexus

One of the most exciting developments in the UK evaluation field currently is the work of the **Centre for Evaluation across the Nexus (CECAN)**⁶. Currently funded by two research councils (ESRC and NERC) and four government departments, the Centre seeks to apply insights from the study of complex emergent systems in to evaluation methods and practice, particularly in environmental sectors and nexus⁷ problems. In addition to its series of (free) seminars and workshops on new and emerging evaluation approaches (videos of these are available on line), the Centre has funded a number of fellowships, is undertaking a series of 'case studies' in the use of new evaluation methods with government departments, and is disseminating the learning via a growing set of evaluation policy and practice notes for evaluation practitioners and policy makers and regular blogs.

⁴ <https://www.gov.uk/guidance/what-works-network>

⁵ CGEG is a group in government that meets to bring together learning and best practice of evaluation from across government.

⁶ <https://www.cecan.ac.uk/>

⁷ The nexus is understood to be the interactions and interdependencies between food (production), energy, and water systems and the environment.

UKES has been contributing to the work of the centre from its outset in a number of ways. UKES Presidents, initially Elizabeth Robin, and now Julian Barr, represent UKES on the CECAN Advisory Board (AB), and UKES council member Dione Hills is a participating partner, and holder of a fellowship looking at how the centre is building evaluation capacity for complex appropriate evaluation practice. In November, Julian and Dione also contributed to a two-day CECAN international symposium – for details, see below under section ‘Representation at Events’. For their part, members of the CECAN team have given presentations at London Regional network events, and the 2016 and 2017 Annual Conferences.

CECAN Advisory Board meetings in 2017

Two CECAN Advisory Board meetings were held in 2017, one in January and the second in July. As well as hearing, discussing and providing advice on updates on CECAN activities, case studies, methodological innovation and capacity building, the Board considered:

- how it could strengthen its own role and impact, for example, through communication channels, advice on specific ad hoc issues, or as a deliberative sounding board in which discussions among Board members (and with members of CECAN who are also present) clarify or give focus to issues that emerge as CECAN progresses. Potential roles include:
 - becoming ‘attached’ to a particular workstream within the CECAN work-programme
 - exploring whether inputs (seminars, workshops etc.) might sometimes benefit from a contribution by an appropriate AB Member (or Members)
 - encouraging AB members to write short think-pieces
 - spending occasional chunks of time at AB meetings discussing an item not as a ‘business item’ but as co-professionals in more of a reflective ‘seminar’ mode.

It was up to individual board members to decide how best they could fulfil one or more of these roles depending on their other commitments.

- Legacy and future funding of CECAN
- Policy-making and policy landscapes. Understanding policy-making and policy scenarios could be useful to CECAN in two ways: firstly, as a ‘map of the territory’ to indicate where current CECAN activities and outputs are/are not focussed and could be, and secondly, as an anticipation of future policy-making and policy scenarios that might support and steer CECAN’s future strategies and planning. The first could help identify gaps and/or areas to extend the applicability of existing CECAN approaches and the second could help future-proof CECAN investments under different potential scenarios and inform positioning/sustainability
- Internationalising CECAN, and in particular experience of successfully bringing together ‘communities of practice’ and assembling international consortia and teams to work on research issues. The Advisory Board suggested that CECAN needed to be clear on why they were internationalising and that it should be a clear part of their identity in the future. CECAN should be driven by where and how they think they will be most effective - responding to calls, or influencing calls? Creating space for innovation, or doing the innovation? CECAN should use existing networks to connect to international partners. The Sustainable Development Goals (SDGs) may provide a useful frame for CECAN to work within; they fit with recent trends in international development to think ‘globally’ rather

than ‘internationally’. The SDGs are an area where complexity and nexus come to the fore, and could provide a useful guide.

Academy of Social Sciences

The Society continues to be a member of the Academy of Social Sciences (AcSS). AcSS is the national academy of academics, learned societies and practitioners in the social sciences. Its mission is to promote social science in the United Kingdom for the public benefit, which is consistent with UKES’ objectives. UKES principally participates through the quarterly meeting of Heads and CEOs of Learned Societies group, which provides both interaction with the Academy and the opportunity to share knowledge between societies on running such organisations.

British Academy and the Government Social Research Network

UKES presented at an evaluation event jointly hosted by these organisations in July. For details, see below under section ‘Representation at Events’

UKES Response to Consultations in 2017

Update on UKES involvement with the revision of the Magenta Evaluation Guidance

Brief overview of the context

This activity involved the request from the cross-UK government group charged with revising the ‘Magenta Book’. The Magenta Book is published by H.M. Treasury, and forms the basis of the guidance offered to all government Departments and other users on evaluation principles and practice.

The nature of UKES involvement

In 2016, UKES was asked to provide a commentary and initial observations specifically on a Draft Evaluation Taxonomy and it was designed as rapid feedback. The first question raised by members of the UKES group concerned the desirability of a taxonomic approach. This is a ‘first order’ question and addressed the best way of framing the world of evaluation and evaluative practice to non-specialists.

UKES impact: Too early to identify impact because the work is on-going to revise the Magenta Book, but our commentary was well received and coincided with other critical observations. The rethinking suggested by our group was taken on board by the governmental team, particularly on the advisability of a taxonomic approach.

There revised Book includes two new supplementary annexes, one on realist evaluation, drafted by a group of government analysts and a second on evaluation of complexity drafted by a CECAN team, including Dione Hills.

Next steps: Work on the Magenta revision had been postponed because of internal governmental issues and is now due for completion in 2018. Recent communication between the cross-

governmental team and the UKES suggests that UKES will have the opportunity for further involvement prior to publication.

Conference 2017

The UKES Annual Conference was held at the Holiday Inn, Regent’s Park, in London on 10th and 11th May 2017. The conference title was: **“The Use and Usability of Evaluation: Demonstrating and improving the usefulness of evaluation”**.

There were three excellent keynote speakers:

- Michael Anderson; Visiting Fellow, Center for Global Development
- Professor Lorraine Dearden; Professor of Economics and Social Studies, University College London and Research Fellow, Institute for Fiscal Studies
- Sue Holloway; Chief Executive, Project Oracle

An innovation in 2017 has been to make the abstracts and full presentations from the conference available on the UKES website after conference⁸.

The conference was attended by 168 delegates, exceeding the annual average of 143 participants since 2010 (See Table 2).

Table 2. UKES Conferences and Participation

Year	Conference Title	No. of Participants
2017	The use and usability of evaluation: Demonstrating and improving the usefulness of evaluation	168
2016	Building a culture of evaluation: Challenging assumptions, unpacking complexity, championing change	194
2015	Evaluation and influence: Innovation, inclusion and impact	155
2014	Moving with the times: Evaluation policy, practice and participation	138
2013	Evaluating to make a difference: Achieving results through learning and accountability	149
2012	Evaluation for results: What counts? Who stands to gain? How is it done?	90
2010	Evaluation in a turbulent world: Challenges, opportunities and innovation in evaluation practice	110

The conference is an important source of revenue for the Society, and this allows funding of projects such as VEPR and website development. The conference needs a certain number of participants to break even. It generated a surplus of £9,658, though this was less than in 2016, when there were more participants.

As usual, the Society asked participants to complete conference evaluation forms. 31 forms were returned (18% response rate). Everyone would recommend the conference to others, and the conference was generally rated as ‘good’. A sample of feedback comments is presented below (Box 1):

⁸ www.evaluation.org.uk/index.php/events-courses/ukes-conference/232-ukes-2017-annual-evaluation-conference-programme-2

Strengths:

- Keynotes excellent, good opportunities to meet and network, some parallel sessions very good and highly interactive.
- A lot of choice of which sessions to attend, excellent keynote speakers.
- Good opening session, good networking
- Great mix for me of affirming current practice, resonating with own experiences, networking, extending and challenging.
- The sessions were mostly timely and very in line with the themes, which were good for expectations.
- Great to receive abstracts for all the parallel sessions, provides enough information to follow up even if not attended. Look forward to presenters' slides being available on UKES website.
- Good amount of time allocated for refreshments and networking.

Weaknesses:

- Not enough time for discussion – parallel sessions often involve lots of presentations and then not enough time to explore areas of interest.
- Would like to see more on innovative practice in evaluation, felt content was sometimes already known/not much new.
- Too internationally focused – more UK examples please!
- Too much downtime.

Overall Impressions:

- Everyone I met from whatever background was open and friendly. Very positive vibe and a great community of practice feel – from beginners to practitioners of many years. A privilege to participate and professionally enriching.
- Much more relevant to my work in local government this year – real dedication to the theme was impressive. I took away some much more practical tips and information and applicable practice.
- It was my first conference with UKES and I enjoyed it very much. I also attended the training on 9 May and found it useful to couple the conference and the training. Looking forward to being more active in UKES.
- Generally I love this conference. Great to network, always come away with new ideas and new motivations. Just please try and encourage more from the UK/domestic scene next time and let's get back on track with methods. Qualitative methods are not just for the "fluffy" stuff to pad out quantitative impact evaluation.
- This year there were a lot of similar types of sessions and discussion (less variety compared to previous years). A lot of presentations basically were speakers talking about their projects and what they learnt but less meta-level analysis or how findings are aligned with wider discussion/literature/practice.

UKES Regional Evaluation Networks

Much of the regular interaction between and with UKES members and the wider evaluation community occurs in our regional networks. The following section reports the major events in each of these networks in the course of 2017:

London and South East Network

The UKES London and South East Network had yet another successful year in 2017. On 25th September 2017, it organised an Evaluation Exchange session – led by Professors Helen Simons and Georgie Parry-Crooke – where participants had an opportunity to discuss evaluation issues in an open forum. In particular, the Evaluation Exchange gave participants the opportunity to (i) discuss their current evaluation concerns; (ii) have free-wheeling debates with other evaluators; (iii) share evaluation knowledge; (iv) access professional experience and expert advice; and (v) network with evaluators engaged in a wide variety of sectors with responsibility for evaluation. A particular emphasis of the session was on evaluation ethics and the ethical dilemmas one often faces in the field. The structure of the session comprised small informal discussion groups, facilitated by members of the UKES London and Southeast Network Group, which then fed into a plenary discussion of key issues, lessons learnt and solutions identified. The Evaluation Exchange was a ‘re-introduction’ of what were once the Network’s ‘Evaluation Surgeries’. These had been in abeyance for some years. It was decided to re-introduce them to give members a space to come together to share their experiences or challenges with peers, as the need for this was identified - from conversations and feedback from other network events - as a potentially valuable service. The Evaluation Exchange is free of charge to members but open to non-members for a small seminar fee. The Evaluation Exchange was well attended and received. Participants included evaluation practitioners and commissioners, all of whom were very engaged in the sessions, which generated a lot of questions and dialogue.

The London and South East Network continues to attract a great deal of interest in the events it organises with people from different types of organisations seeking more information about UKES and the network and its upcoming events, and asking to be added to our distribution list. To this end, the network (and this is true for other UKES regional networks as well) acts as a potential conduit for increased UKES membership and active participation in the Society. Participants at network events frequently say that they come to an event to see what evaluation is about and get a sense of what UKES offer before joining the Society.

The network planning group has had a number of membership changes over the last year. The work is voluntary and job and life changes have led to some attrition. A new member was recruited this year and the network is open to receiving additional applications to join the planning group and enhance its work. Institutional members are most welcome and when events and trainings are planned which they are able to host, the fee for 2-3 of their staff is waived.

The network’s forward plans for 2018 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 Giorgia Iacopini at g.iacopini@tavinstitute.org

South West Evaluator Forum

The South West Evaluator Forum had a good year launching their co-produced guidelines to involving patients and the public in Evaluation <https://clahrc-west.nihr.ac.uk/news-item/guidelines-patient-public-involvement-evaluation-launched/>. This work was original funded by the UK Evaluation Society through the EvalPartners International year of evaluation.

- They have continued to meet, furthered their twitter presence ([@EvaluatorForum](#)) and joined up with local networks to deliver events and contribute to a virtual network. This included engaging in the development and contributions to a virtual network led by NIHR CLAHRC West and the West of England AHSN ([EVALUATIONONLINENETWORK-WEST@JISCMail.AC.UK](#)). This is to help facilitate further engagement and communication with a wider network and to provide an alternative to face to face meetings.

For 2018/19 the South West Evaluator Forum are looking for a new coordinator and lead. If you are interested then please do get in touch with UKES at ukes@professionalbriefings.co.uk.

Evaluation Network Scotland

2017 was an eventful year for evaluation in Scotland. Having re-established a UKES regional network in 2016, an opportunity arose to re-energise evaluation networking in Scotland by merging the new UKES regional network with what remained of the Scottish Evaluation Network. It made sense to have only one network for evaluators. The new network was branded as the 'Evaluation Network Scotland' (ENS) and has a planning group of five volunteers.

There are 312 people on the ENS mailing list from a range of sectors including NHS, local government, Scottish Government, academia, international development, charity and voluntary organisations, skills sector and enterprise, and independent funders. Only a small proportion of them are UKES members. The mailing list is used to share details about ENS' quarterly forums and other evaluation information, including tenders and training opportunities.

In 2017 there were four forums, shared between Edinburgh and Glasgow. The forums were well attended with between 20-25 people. Topics included Building Self-Evaluation Capacity (March); How to become a (better) Evaluator (June); Networking Event (September); Contribution Analysis (November). The plan is to continue to host quarterly forums going forward.

ENS has also established a LinkedIn group, with the hope that it will become a means of connecting with each other, promoting debate about evaluation and sharing useful resources.

Contact: Christiane Kerlen, christiane.kerlen@kerlen-evaluation.de

Glasgow Evaluation Group

The Glasgow Evaluation Group (GEG) is a local expression of Evaluation Network Scotland, established in 2016. Through word of mouth, there are 80 people on the GEG mailing list. In 2017 GEG met every two months or so for a 50-minute lunchtime session. It is an informal opportunity to share work, experience and learning with fellow evaluators based in Glasgow. The session usually follows the format of a 20 minute presentation followed by discussion. Attendance in 2017 ranged from between 7-17 people. Topics in 2017 included Evaluability Assessment; Working with External Evaluators; 'Happily ever after' - Evaluation Endings; Using logic models to support evaluation; Model for Improvement - roles of an evaluator in a

complex world. There have also been good examples of networking between evaluators outside the sessions due to the GEG.

Contact: Colleen Souness, colleen.souness@therobertsontrust.org.uk

Midlands Regional Network

The Midlands Regional Network was officially launched at the University of Birmingham on 7th December 2017. The network will be strongly committed to supporting economic and social development of the region through working in collaboration with other analytical communities and public, private and third sectors in the generation of evidence by evaluation and its use. The network's convenor is Karl King (Winning Moves) and the other members of the steering group include Rebecca Riley (City REDI, University of Birmingham), Michelle Hollier (Winning Moves), Tracey Wond (University of Derby) and George Bramley (University of Birmingham).

Around twenty members of the network were able to attend the launch which included presentations from Delma Dwight, Helen Wilkinson, Rebecca Riley and Karl King with Will Rossiter and Tracey Wond acting as discussants. The event was opened and hosted by George Bramley on behalf of the University of Birmingham. Delma, who is the Director of Economic Intelligence at the Black Country Consortium, provided her perspective on likely evaluation needs of the West Midlands Combined Authority. Helen is member of the Centre for Evaluation Complexity across the Nexus (CECAN) team and described the work of the Centre and trialling of the use dependency modelling in evaluating the Environmental Agency's flood and coastal erosion programme. Rebecca's presentation was on City REDI and the What Works Centre for Local Economic Growth. Karl presented an analysis of responses to the joining survey. Winning Moves sponsored refreshments for the launch event.

MRN has published its first newsletter which includes an article on the launch event and planned future events, which can be accessed along with the presentations on MRN page on the UKES website provide a link??.

Communications

The Society has actively communicated news and updates to members in 2017 through a range of channels, including our **e-bulletins**, **website** features, **Twitter**, **LinkedIn** and **The Evaluator**. The e-bulletins have covered numerous events, training opportunities and Society announcements, including the opportunity each year to register your interest in joining the UKES Council. The website received a refresh in 2017, simplifying the site structure to improve functionality, making subtle updates to its design and appearance, adding links for Twitter and LinkedIn, and launching the Voices blog which received its first post by Donna Buxton from The Health Foundation: "Evaluation - has it all gone Pete Tong?" We are becoming increasingly active in social media and 2017 was the first year that the UKES Conference was live-tweeted via the **@ukesupdate** account - posting updates, liking and sharing tweets from attendees - which was positively received by members.

We have produced two editions of The Evaluator in 2017, one early in the year on the 2016 conference, and one later in the year covering the 2017 conference.. The regional networks have also been active in communicating local news and updates, and links to our active networks are available via the UKES website. Finally, 2017 saw the launch of the Communications Task and Finish group which will be working through 2018 to better understand members' preferences and refine our communications offer.

The Evaluator

The *Evaluator* is the magazine of the UK Evaluation Society. It has feature articles on recent research and on evaluation theory, methods and practice. The two 2017 editions covered the 2016 and 2017 conferences respectively.

The **Spring 2017 Edition** of *The Evaluator* focused on the 2016 conference theme of *Building a Culture of Evaluation* and contained articles chosen to demonstrate the breadth of treatment given to this theme. As it related to 2016, this edition was reported in last year's Annual Report.

The **2017 Conference Edition** of the *Evaluator* reported on the conference themes of *Use and Usability of Evaluation*. It summarised the keynote addresses by Michael Anderson, dealing with the special challenges of conveying accurate information in an age where, on the one hand, 'expertise' is mistrusted, but on the other, knowledge is more accessible than ever and Lorraine Dearden, whose *Good and not so good practice in quantitative impact evaluation*, provided plenty of examples of the misuse of evaluation findings, as well as advice on how to make sure findings are used responsibly. The edition also featured articles on how evaluators should facilitate the dissemination of findings to achieve truly evidence informed policy and service provision: one article focussed on making evaluation usable for charitable groups; another on increasing the memorability of findings by 'making evaluation fun'. Anoushka Kenley of New Philanthropy Capital (NPC) reported on a consultation with 13 leading evaluation experts about the approaches, tools or techniques most likely to make a long lasting contribution to evaluation, while Kirsti Thornber and Matthew McConnachie provided a case study of how a user-centred approach, and a focus on embedding monitoring and reflexive evaluation, were able to support the development and demonstrate the impact of a project in Malawi designed to increase resilience to climate change. Finally, the edition included the reflections of the outgoing UKES president **Elizabeth Robin** about the challenges and achievements of the last three years.

E-bulletin

The e-Bulletin is current the primary means by which the Society communicates to its members. The following e-Bulletins were published in 2017:

Month	Topic
February	Notification of Networking Workshop for Evaluators in Scotland and North East England: Evaluation Capacity Development 1 March 2017
March	Update on UKES 2017 Annual Evaluation Conference 10-11 May 2017
April	Further update on UKES 2017 Annual Evaluation Conference 10-11 May 2017 Notification of UKES Training Programme Event: Understanding Theory of Change and Impact Evaluation 9 May 2017 Reminder of UKES Training Programme Event: Understanding Theory of Change and Impact Evaluation 9 May 2017 Final update on UKES 2017 Annual Evaluation Conference 10-11 May 2017
May	Notification of forthcoming vacancies on UKES Council and request for nominations
June	Notification of publication of UKES Annual Report 2016 Notification of UKES London/Southeast Regional Network Event: Ethics in Today's Evaluation World 12 July 2017 Notification of Networking Workshop for Evaluators in Scotland and North East England: Developing Evaluation Capacity 28 June 2017

	Reminder of UKES London/Southeast Regional Network Event: Ethics in Today's Evaluation World 12 July 2017
September	Reminder of forthcoming vacancies on UKES Council and request for nominations Notification of UKES London/Southeast Regional Network Event: The Evaluation Exchange 25 September 2017 Notification of UKES Training Programme Event: Understanding Economic Evaluation: What does value for money mean? 9 October 2017 Reminder of UKES London/Southeast Regional Network Event: The Evaluation Exchange 25 September 2017
October	Reminder of forthcoming vacancies on UKES Council and request for nominations
December	Reminder of forthcoming vacancies on UKES Council and request for nominations Notification of UKES Midlands Regional Network launch event 7 December 2017 Notification of opening of call for abstracts for UKES 2018 Annual Conference 2-3 May 2018 Notification of extension to closing date for submission of abstracts for UKES 2018 Annual Conference 2-3 May 2018 Christmas message from outgoing UKES President Elizabeth Robin

Website

The Society's website⁹ was reviewed and revised in 2017. A decision was taken to undertake a simple reorganisation of the menu structure of the website, but not at this stage redesign it. Work was also undertaken to upload the 2017 Annual Conference presentations as PDF files. The Communications Task and Finish Group has since further review the website and concluded that a larger redesign is now called for. This will be undertaken in 2018.

The website received an average number of 770 unique visitors and 1250 visits per month during the year.

Representation at Events

The **British Academy** and the **Government Social Research Network** held a one-day workshop on 12th July 2017 at the British Academy, entitled: "*Evaluation: impact, challenges and complexity*". The workshop included civil servants, academics and other evaluation specialists, who discussed evaluation methodologies, generating evidence of impacts, and challenges relating to complexity. The purpose of the workshop was to discuss the frequent pitfalls in commissioning, designing and delivering robust evaluation, and to explore good methodologies that can be employed when evaluating policy programmes.

Several Council members were invited and Julian Barr presented a paper on behalf of UKES. This emphasised that evaluation is a distinct field of practice, that it is methodologically pluralistic, and that quality, rigour and therefore trustworthiness of evaluations can be established in a number of ways. Other presenters included Jenny Dibden (Head of the Government Social Research Service), who provided an overview of the GSR and the importance of evaluation in Government; Professor Oriana Bandiera FBA, who impact evaluations and ways to engage academia at appropriate stages of an evaluation; and Siobhan Campbell (Head of the Cross-Government Evaluation Group), who spoke about the different functions of evaluation – accountability, to demonstrate a policy's efficacy and

⁹ www.evaluation.org.uk

value for money – and as a learning exercise to understand what works and why. As part of this, she discussed some of the common pitfalls, tensions and challenges in Government evaluations.

After the presentations and some plenary questions, the workshop broke into smaller groups, who each explored a number of evaluation case studies. The workshop heard a certain level of support for counterfactual and experimental approaches evaluation, though our UKES presentation argued in favour of plural approaches.

On 9th and 10th November, Julian Barr and Dione Hills participated in, and presented at, **CECAN's** two day **International Symposium on Complexity Approaches to Evaluate Global Nexus Policy Challenges**, which brought together national and international academics, practitioners and policymakers involved in policy evaluation to explore how complexity approaches can and are being used to evaluate and reframe policies in the nexus. The event was part of the Economic Social Research Council (ESRC) Festival of Social Science. It had three main objectives:

- Explore the latest developments in the evaluation of international nexus policies and why complexity is fundamental
- Encourage international effort to boost the inclusion of complexity approaches in informing nexus policy evaluations
- Catalyse the development of an international community of practice and excellence in nexus policy innovation

Topics covered included: the need for complexity sensitive evaluation, communicating complexity in an evaluation context, exploring complex thinking for sustainable futures, cutting edge evaluation methods and how to increase the uptake of them, and how to get government to deal with complexity, developing capacity in international Nexus policy evaluations, and application of complexity science in assessing and evaluating policy.

The symposium produced a set of key messages across a number of domains. These included:

- Applying a complexity lens to policy evaluation means advocating evaluation as part of the whole policy cycle, contributing to an iterative and reflexive form of policymaking.
- There is a need for more 'experimentation' within policy design and evaluation, recognizing that failure will occur but that it is also an opportunity for learning: a movement towards adaptive policymaking.
- Critical to shift the basis of evaluation from one of accountability to one of learning, from an approach to evaluation which is effectively accountancy to one that advocates knowledge, understanding and ultimately learning.
- This links to an adaptive approach: we must expect complexity and so experiment. adapt to the way an intervention is altering the system and use m&e in real-time to capture the learning of how the system is responding and changing
- Embed complexity-appropriate evaluation skills in 'competency frameworks' for relevant posts and professions in government.

- Develop a 'commissioning framework' that helps commissioners to triage evaluations by assessing the extent to which evaluations need to be adaptive in order to prioritize and allocate resources accordingly.

A report is available from CECAN¹⁰.

¹⁰ www.cecan.ac.uk/news/summary-report-cecan-international-symposium-on-complexity-approaches-to-evaluate-global-nexus

ANNEX 1: LIST OF 2017 COUNCIL MEMBERS

Council Elections for 2017-2018 resulted in the following appointments:

Council members

- Andrew Berry, Andrew Berry Research and Evaluation (elected unopposed)
- Dione Hills, The Tavistock Institute (re-elected unopposed)
- Emma Gibbard, Avon Primary Care Research Collaborative, later Bath University (re-elected unopposed)
- Mark O'Brien, University of Liverpool (re-elected unopposed); resigned within the year
- Stephen Morris, Manchester Metropolitan University (elected unopposed)

Co-opted members

It was agreed to co-opt the following members once again in 2017:

- Derek Poate, UKES Past President (leading on VEPR scheme)
- Helen Simons, UKES Past President (leading on guidelines for good practice and evaluation capabilities framework)
- Murray Saunders, Lancaster University and UKES Past President

Officers

- Kelly Beaver resigned as Secretary, and the role was assumed by Colin Jacobs on a temporary basis.

It was also agreed to contact Siobhan Campbell from the Cross Government Evaluation Group regarding the possible co-option of a representative to Council.

The full **UKES Council for 2017** was:

OFFICERS	COUNCIL MEMBERS	CO-OPTED MEMBERS
President Elizabeth Robin	Andrew Berry Bev Bishop	Derek Poate Murray Saunders
Vice President Julian Barr	Stefano d'Errico Emma Gibbard	Helen Simons
Immediate Past President Colin Jacobs	Alison Girdwood Kari Hadjivassiliou	
Secretary Kelly Beaver / Colin Jacobs	Dione Hills Ulrike Hotopp	
Treasurer George Bramley	Stephen Morris Mark O'Brien	

Council Elections for 2018-2019, which closed in October 2018, resulted in the following appointments:

Council members

- Rebecca Adler, LTS International (elected unopposed)
- Laura Hayward, LTS International (elected unopposed)
- Pete Welsh, OPM Group

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 on our website.

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

Annex 2: List of Institutional Members

AlphaPlus Consultancy Ltd
Atkis Strategy
Australian Council for Educational Research
Big Lottery Fund
Bond
CAG Consultants
Centre of expertise on child sexual abuse
Comic Relief
Dementia UK
Department for International Development
Ecorys UK
ekosgen
ICF Consulting Services Limited
IMC Worldwide
Integrity
International Institute for Environment and Development (IIED)
IOD PARC
ITAD Ltd
Landell Mills
LTS International
Money Advice Service
Office for Public Management Group
Oxford Policy Management Ltd
Plan International UK
Sport Wales
SQW
Tearfund
Technopolis Ltd
The British Council
The Health Foundation
The Palladium Group
The Tavistock Institute
Triple Line Consulting
University of Birmingham
VSO
Warwick Economics and Development Ltd
Wellcome
WRAP
WYG International

ANNEX 3. SUMMARY OF BUSINESS PLAN 2017-2019

The base scenario to cover the Society's operating costs assumes an individual membership of 80 and institutional membership of 20, with a significant portion of income from the annual conference (£10,000) and other events (£3,000). The aim is to increase all four of these main income streams over the course of the business plan. The following income targets were set:

	2017 Base	2017 Target	2018 Target	2019 Target
Membership income (Institutional)	£9,600	£14,400	£19,200	£19,200
Membership income (Individual)	£5,600	£7,700	£9,100	£9,100
Conference surplus	£10,000	£14,900	£16,000	£16,000
Events surplus	£3,000	£4,000	£4,000	£4,000
Other income surplus	£0	£1,000	£2,000	£2,000
	£28,200	£42,000	£50,300	£50,300
Means:	Cover operating cost; special projects would need to be funded from dwindling reserves	Can fund special projects, small surplus which may be able to carry forward previous losses so do not pay tax	Fund operating costs and special projects and rebuild reserves	Fund operating costs and special projects and rebuild reserves

Underpinning these targets are the following objectives:

Membership

2017: Closing the gap between operating costs and membership fees by:

- Maintaining existing number of **institutional members** and aiming for additional 7 institutional members. This would require identifying and approaching at least 20 potential members.
- Maintaining existing number of **ordinary members** and increase retention by 10 percentage points.

The Society's operating costs would still need to be partly covered by the surplus generated by the annual conference.

2018: The aim should be that membership fees cover general operating costs with a projected small surplus. To achieve this, the Society aims to have 40 institutional members and a minimum of 130

ordinary members. The new banded fee structure for institutional members encourages the registering of individual staff members, which will help the Society produce more meaningful figures on membership in future years.

2019: The Society aims to maintain and grow the number of members. Institutional members will continue to be a key source of income. In year 3 the income stream from sponsorship of Society activities by institutional members should be firmly established. The focus initially would be on the largest members and those that routinely present at conference. A realistic target would be average annual contributions of £500 from 10 institutional members, or a total of £5,000.

Conference

Conference rates are agreed annually so may change over the course of the business plan. Until recently, UKES counted the number of attendees at conference. In future, a distinction will be made between the number of delegate fees received and participants from whom the Society does not receive conference fees (e.g. free places for keynote or other speakers) for financial planning purposes.

Some free or discounted places will still be required and the conference lead and planning team will have discretion to offer these where appropriate. However, the aim is to keep these to a minimum and seek specific sponsorship, where possible, from institutional members to cover the provision of reduced fees, or bursaries that would also cover T&S. To increase conference surplus, the Society will seek sponsorship for:

- Keynote speakers' conference fees (a free place is currently provided in lieu of a fee) and their travel and subsistence
- Reduced fees for students and/or participants from third sector organisations / developing countries
- Reception
- Trainer fees and expenses for any training courses run in conjunction with conference.

The targets below are based on a combination of securing more conference sponsorship and careful allocation of places offered free or at a reduced rate. Venue location, cost and size are likely to be factors in achieving these targets, as will conference theme and the wider economy.

2017 The aim is to increase the surplus for the same number of delegates as 2016 conference by a minimum of £2,000.

2018: The aim is to increase the surplus for the same number of delegates as 2016 conference by an additional £2,000.

2019: Assuming a similar number of delegates as 2016 conference, a surplus in the region of £16,000 to £19,000 excluding VAT. (2016 was £12,930 with 194 attendees).

Using venues capable of holding more delegates than previous years may also help increase surplus depending on venue costs.

Events

Where possible, training events should be designed and delivered in such a way that they can be repeated, including in different parts of the country, if there is sufficient demand. It is likely that most income generating events will be London based. The Society is adapting a costing model developed by the London and South East Network which includes offering institutional members who provide free venues 2 to 3 free places. UKES needs to identify institutional members who are able to offer venues outside London free of charge to allow successful events to be rerun where demand would support it, or factor in the cost of venue hire. Events will be open to non-members who will pay the full fee as well as members who will receive a discount. The Society plans to run 4 events per year, each capable of generating a surplus of around £1,000. A course which is run twice in two different locations would count as two events.

Other potential developments over the life of the business plan

Many of the potential activities that were identified require investment in IT infrastructure and could not therefore be introduced until later in the plan:

- Introducing a calendar of training events and seminars related to evaluation on the website for which third parties delivering independently of UKES might pay an advertisement fee.
- Introducing a searchable register of evaluators on the website.
- Streaming of seminars or training events three to six months after they happen which would be free to members and chargeable to non-members.

ANNEX 4: ACCOUNTS YEARS ENDING 31 DECEMBER 2017

Accounts for the financial year ending 31st December 2017 are in preparation and will be appended to this report once finalised and signed off.



UK Evaluation Society
1 St Mary's Courtyard
Church Street
Ware
Hertfordshire SG12 9EF
Telephone: 01920 462411
Email: ukes@profbriefings.co.uk
Website: www.evaluation.org.uk
Company Limited by Guarantee
Registered in England No 04056956