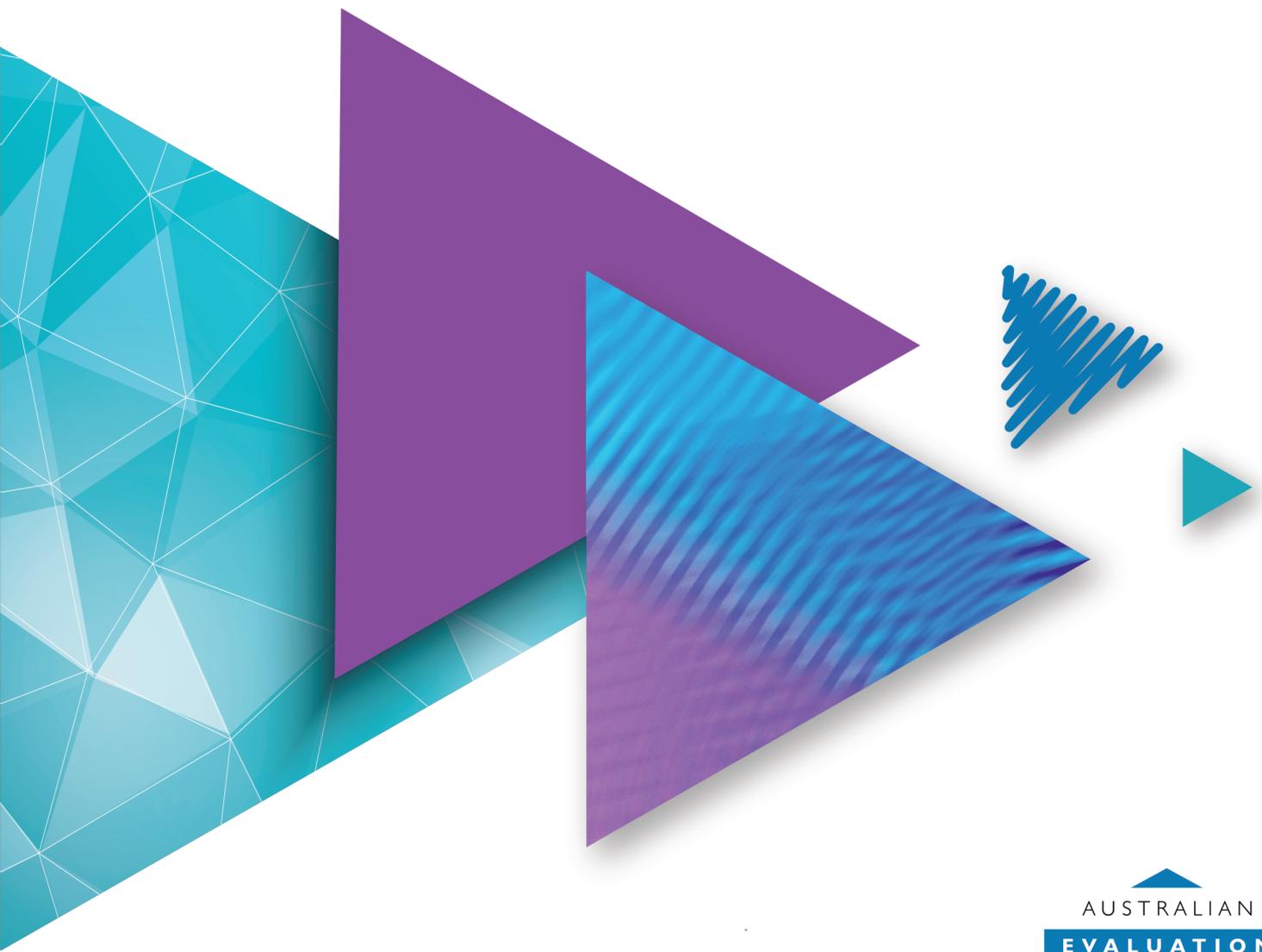


**2021–2022**

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ANNUAL REPORT





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→ **OUR VISION**

Quality evaluation that makes a difference

→ **OUR MISSION**

To strengthen and promote evaluation practice, theory and use

→ **OUR VALUES**

Our Code of Ethics guides the activities and behaviour of our members. In essence the guiding principle is:

When commissioning, conducting or reporting an evaluation, members should strive to uphold the ethical principles and associated procedures endorsed by the AES in the Guidelines for the Ethical Conduct of Evaluations.

# President's report

*Ko ngā pae tawhiti, whāia ki a tata  
Ko ngā pae tata, whakamaua kia tinana*

*The potential for tomorrow depends on what we do today*

Tēnā koutou, wunya ngulum, greetings and welcome everyone.

Firstly I acknowledge the Traditional Custodians of all of the lands on which we AES members live and work from. For me it is the Gubbi Gubbi/ Kabi Kabi people who care for Country where I live. I pay my respects to Elders past and present across this mighty land, for they hold the memories, the traditions, the culture and the hope of Aboriginal and Torres Strait Islander people across this great nation.

Amongst the global turbulence of the past two and half years, the Board has recognised the resilience and incredible efforts of our membership to adapt and provide a range of accessible offerings ensuring the health and wellbeing of our evaluation community was paramount. We have also heard your desires to meet face-to-face after such a long period. aes22 in Adelaide will be a celebration and our gratitude goes to the 2022 Conference Committee for their efforts to bring us together once again.

Despite a range of COVID-19 related challenges throughout the past year, enormous progress has been made across our association. This brief update can't encapsulate all of the advancements, so please know that your contribution as an AES member is valued and does enable us to provide rich opportunities to the membership.

Our four strategic domains had much activity during 2021–2022:

## Vitality

- A Diversity and Inclusion Strategy was developed. It consists of two components: a high-level diversity and inclusion statement; and a membership strategy.



AES President Kiri Parata

- Strategic priorities adopted in 2019 have been realised, receiving significant investment, including human resource and boosting our membership offerings.
- FestEVAL21 in September attracted 3,000 energetic people across 23 sessions.
- AES financial health remains strong despite two years without a conference.
- Special Interest Groups (SIGs) continue to play a pivotal role. With close to 1,000 members participating directly in a SIG or through SIG related activities throughout the past year, we are grateful for the energy, time and commitment members make to the SIGs.
- Eight regional networks continue to actively provide networking and seminar events in the regions, contribute to the professional learning program and highlight matters from the regions to the Board. This enables regional diversity to have voice.

## Cultural capacity

- A record number of conference support grant applications have been received in 2022.
- AES First Nations Cultural Safety Framework workshops are firmly part of our professional development offerings and are well attended.
- Strength and safety is realised knowing we have a large group of Indigenous members participating and advising through the Indigenous Culture and Diversity Committee.
- AES is attaining and embedding cultural safety through its commitment to reconciliation and is moving from the Reflect stage to the Innovate stage of our Reconciliation Action Plan.

## Pathways

- A renewed Evaluator Competency Framework, in collaboration with the University of Melbourne, was developed, reviewed, tested and published at the end of 2021.
- A Pilot Mentoring project was completed and evaluated in 2022. The Board agreed to implement the annual AES Mentoring Program, with support of a part-time administrator.
- A strategic review of the *Evaluation Journal of Australasia (EJA)* was completed during 2021–2022. Resourcing for the EJA has been firmed up with the establishment of new editorial and governance structures.
- Several editorial appointments, including a new Editor, have been made for the EJA. The larger editorial team comprises: an Editor, four Associate Editors, a Managing Editor and an Editorial Assistant.
- The EJA Editorial Advisory Board now consists of 21 members (with representation from Australia, Aotearoa New Zealand, the United States and the United Kingdom).
- *Fellows*: In 2021, the AES welcomed five new Fellows, the most since the Fellows were established in 2003; Lyn Alderman, Janet Clinton, Jess Dart, Dorothy Lucks and Nan Wehipeihana. Nan is the first Indigenous Fellow of the AES.
- *Awards and Recognition Working Group*: An awards review undertaken during 2020–2021 has been consolidated. Five awardees were recognised in 2021, including in the new category of Award for Enhancing the Social Good. Existing awards of Indigenous Evaluation and Publication have been reinvigorated, with a greater focus on Indigenous empowerment in the Indigenous Evaluation Award and through partnership with the EJA for the Publication Award.

## Relationships

- Cross-Tasman relationships with Aotearoa New Zealand Evaluation Association (ANZEA), Mā Te Rae Māori Evaluation Society and the Pasifika Fono were reinvigorated during 2022. Together we collaborated on the appointment of Kwadwo Adusei-Asante to the IOCE board where he will represent our collective South Pacific region.

- The State of Evaluation project is currently underway seeking to understand the drivers and practice of evaluation across Australia, and future directions for the sector.
- AES continues to stay abreast of major shifts in the evaluation sector and has formed various strategic relationships to promote evaluation. An example is the strengthened relationship with representatives from the Department of Finance in the lead-up to the finalisation and release of the Commonwealth Government's Evaluation Policy and Toolkit during 2022.

During my one-year term as President, I have thoroughly enjoyed working closely with a fantastic group of people on the AES Board. We have been ably supported by our highly competent Chief Executive Officer Bill Wallace. Sadly, we farewelled our Membership and Events Officer Michelle Wightwick this year. I wish to publicly thank Bill for his ongoing commitment and energy to the AES.

I whole-heartedly believe the AES is in such a great position with high membership engagement and satisfaction due to the enduring relationships, friendships and the commitment members make to progressing the strategic aims of the organisation. Providing opportunities where members can see themselves directly imparting their skills plays out as a highly functioning operation. As Board members we have often reflected on the volunteer nature of the AES and the huge commitment from its members to keep us steady, professional and striving for excellence. Ngā mihi ki a koutou katoa. Thanks one and all.

We look forward to welcoming your contributions as we engage in another strategic planning round in the near future. As the Māori whakatauki (proverb) states:

***Ehara tāku toa i te toa takitahi,  
engari he toa takitini***

***My strength is not as an individual,  
but as a collective***

Mauri ora, na

**Kiri Parata**  
President

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# Treasurer's report

## Introduction

Amidst the continued economic and health impacts of the COVID-19 pandemic over the past year, the Board has monitored and been able to mitigate the financial risks. I'm pleased to share that this has resulted in the AES returning a better than expected result at the end of June 2022, with a smaller net loss than budgeted. This relatively small loss has little impact on the health of our balance sheet and I am confident that the organisation can continue to operate with certainty and provide services in a sustainable manner.

## Summary of the 2021–2022 results

Overall, our operating income for 2021–2022 was \$508,448 (against a budget of \$467,500) and our expenditure was \$551,307 (against a budget of \$556,000). This resulted in a net loss of \$42,859 (\$45,636 less than the budgeted loss of \$88,495).

As with the year before, the Board deliberately budgeted for a loss in 2021–2022. The rationale for this decision was the expected decline in revenue due to reduced activity resulting from the pandemic. In planning for the 2022 budget, the Board took the prudent decision to again postpone the annual conference in September 2021, and reduce Board related costs by limiting the number of face-to-face meetings to two for the year (instead of four).

In setting the budget, the Board also made the assumptions that membership would remain steady; no government assistance would be provided; workshop income would remain at the levels seen in 2021; and that the AES would continue operating with two full-time staff. For strategic reasons, the Board approved spending on special projects of \$40,000.

Fortunately, many of our assumptions did not prove correct, and we actually outperformed our budgeted net result by \$45,636 – instead of making a loss of \$88,495, our loss was 52% lower at \$42,859. This is a good result considering the economic context and it puts the AES in a solid financial position for the coming year.

The better than forecast loss was achieved by a combination of higher than projected income from membership fees and an increase in the number of paid online job advertisements. As at 30 June 2022 membership was 1,155 – slightly up from June 2021 (1,050) and also slightly higher than pre-pandemic numbers (1,043 at 30 June 2019). Membership fee income of \$231,312 was up 10% from the year before and 13% higher than budgeted. The Board was of the view that membership numbers would decrease due to the pandemic, but pleasingly this did not happen.

On the expenditure side, we spent less than forecast on the EJA and our strategic projects. We delayed employing an Indigenous committee support worker, and had a lower wages bill due to less staff for part of 2022.

In 2021–2022 the virtual workshop program returned a surplus of \$123,528. It is slightly lower than budgeted and \$9,499 less than the previous financial year (\$133,027). This is mainly due to expenses incurred in the development of the Cultural Safety Framework workshops, increased technology costs for the Zoom workshops, and expenses associated with our learning partnership with IPAA in WA. The workshop surplus is however still well above the 2019–2020 surplus of \$46,069.

The better than forecast result should be a comfort to members. Current equity (members' funds) is \$520,355. Whilst this is a moderate 8% decrease in equity (\$563,213 as of June 2021), the AES is in a favourable financial position and can confidently continue to operate over the coming years.

## Analysis of comparison to previous year

The years 2021–2022 and 2020–2021 cannot be compared directly. The 2020–2021 actual result included \$90,812 in government pandemic assistance. When removing the government assistance, as is shown in the table on page 6, we would have made a loss in both financial years. The higher loss in 2021–2022 is largely due to increased project spending.

Profits/(loss) as at June 2022 compared to previous year

	June 2022	June 2021	Difference
Actual result	(\$42,859)	\$62,576	(\$105,435)
Result without government assistance	(\$42,859)	(\$28,236)	(\$14,623)

Profit and loss budget – our position against budget:

- Operating income of \$502,057 is 9% higher than budgeted (+\$40,943), due to 13% higher than budgeted membership fees, and 24% higher than budgeted income from publications (due to increased number of job advertisements).
- Expenditure for 2021–2022 was 1% lower than budgeted (–\$4,693) mainly due to decreased wages and governance expenses.
- Administration expenses were 6% lower than budgeted.
- The loss of \$42,859 was 52% less than the projected loss of \$88,495 (–\$45,636),

Profit and loss – our position compared to the previous financial year:

- Operating income (not including conference) of \$508,448 is 10% lower than last year due to lack of government assistance (\$90,812 in 2020–2021). This is partially offset by a 10% increase in membership fees.
- Operating expenditure increased by 9%, mainly due to higher expenditure on professional development, governance and cost of providing online services.
- Surplus from workshops was \$123,528 compared to \$133,027 the previous financial year.
- Overall profit (loss) was –\$42,859 (as of June 2022) compared to \$62,576 (as of June 2021) – a 168% decrease.

Balance sheet analysis – June 2022 against June 2021:

- Cash balance increased by \$51,129 (+9%).
- We are holding venue (and other) deposits for future conferences on the balance sheet totalling \$186,325, including \$117,330 for

aes22, \$50,557 for aes23 and \$15,688 for aes24.

- Total assets increased by 32%.
- Total liabilities increased by 158% as we are holding \$257,000 in unearned conference registration income.
- Total equity (members' funds) has decreased by 8% (–\$42,858). Total equity is \$520,355 as of June 2022 compared to \$563,213 as of June 2021.

**Looking forward**

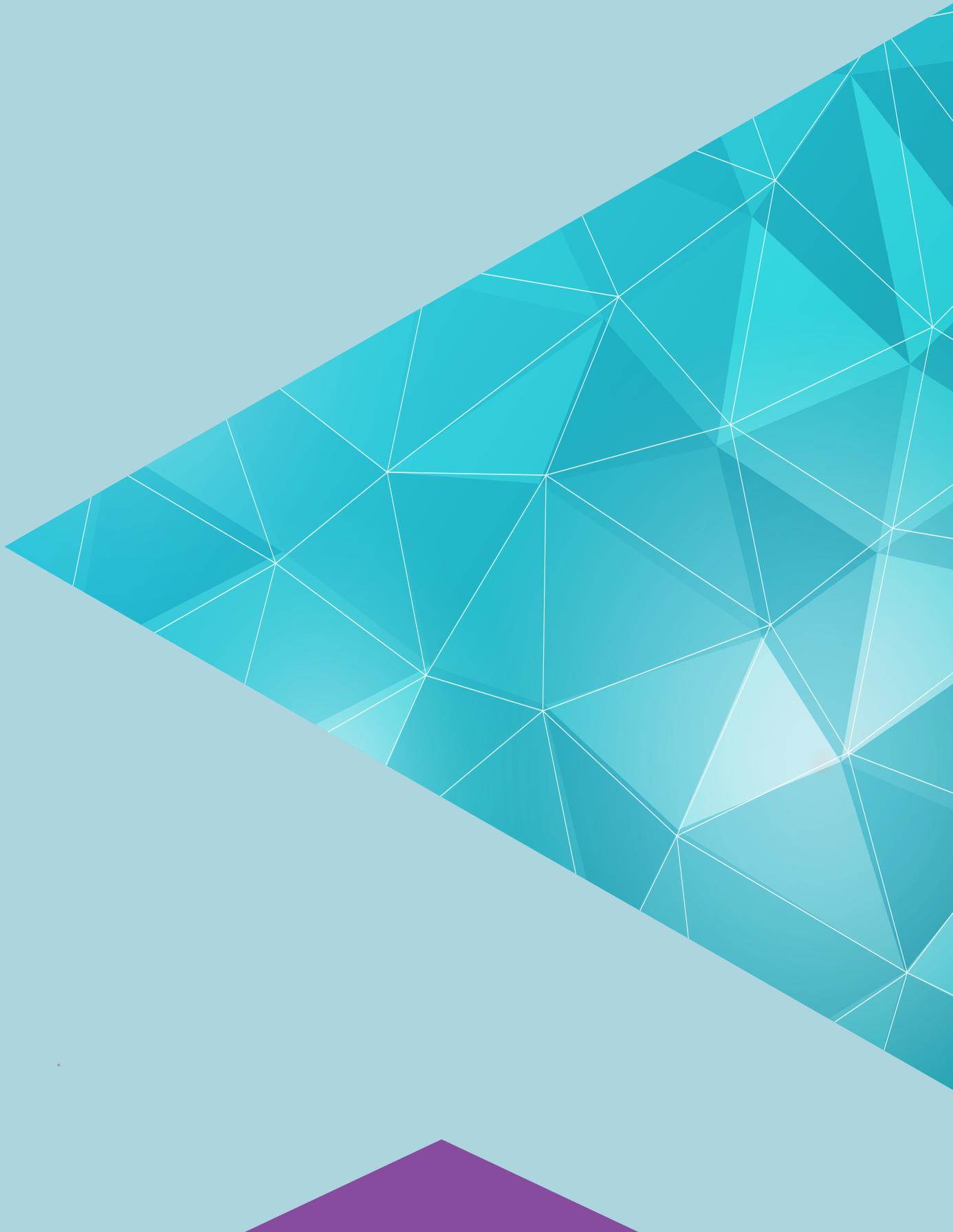
2021–2022 is the first year since 2019 that we will be hosting a conference. We hope this will have a positive impact on our balance sheet. In addition to income generated from the conference, the 2022–2023 budget is based on the assumption that membership remains steady; no government assistance is received; and that we will be able to continue to generate workshop income at a similar level to 2021–2022. We have budgeted for the development of the next stage of the Reconciliation Action Plan (RAP) and other strategic projects; increased administrative costs for the Indigenous Cultural Diversity Committee; increased costs in the provision of member services, including the Group Mentoring program; and the AES is supporting the regional networks to host up to two face-to-face social events.

With this in mind, we are budgeting for between a loss of \$4,660 and a surplus of \$22,933, depending on conference attendance. We are of the view that this is sustainable given the strong balance sheet, and we are confident that the results will return to a surplus in the following financial year.

**Carina Calzoni**  
Treasurer

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# ABOUT US



# Who we are

The Australian Evaluation Society (AES) is a professional organisation for people involved in evaluation, including evaluation practitioners, managers, teachers and students of evaluation, and other interested individuals.

We have over 1,000 members involved in all aspects of evaluation and performance measurement. The AES is governed by a Board of Directors and managed by a Chief Executive Officer and staff.

Our members represent diverse professional sectors and areas of evaluation practice and meet regularly through regional networks, Special Interest Groups, discussion groups and an annual conference.

The AES offers professional development through an annual international conference, a peer-reviewed evaluation journal, and regular workshops and seminars.

## Objects of the AES

- Establish and promote ethics and standards in evaluation practice
- Encourage advances in the theory and practice of evaluation
- Provide education and training related to evaluation
- Provide forums for networking, professional development and the discussion of ideas
- Increase understanding of evaluation and advocate for quality evaluation
- Be inclusive of Indigenous and all cultural perspectives
- Have governance systems that reflect and incorporate best practice
- Provide a forum that allows the diverse voices of the community to be heard, including those who commission the evaluations, those who carry them out and the evaluands
- Undertake other activities consistent with these aims.

# Member benefits



## Recognition and support

Belonging to the longest established professional evaluation organisation in the region, with a network of over 1,000 practitioners, commissioners and academics involved in all aspects of evaluative enquiry and performance measurement.



## Code of ethics

Members abide by the AES Code of Ethics, and are guided by and support the AES Guidelines for the Ethical Conduct of Evaluations.

Members are encouraged to rely on the Code when faced with situations that require them to balance competing ethical principles.



## Professional learning opportunities

Opportunities are available to learn from leading local and international expert evaluators through the annual conference and professional learning activities. Members keep up-to-date through AES publications, workshops, seminars, discussion groups and conferences.



## Networking

Members make contacts with colleagues in evaluation by joining in regional group meetings and other activities for training, networking and discussion of current evaluation topics.



## Publications

Online, member-only access to the *Evaluation Journal of Australasia* (EJA) and six SAGE Publishing titles, and the AES Guidelines for the Ethical Conduct of Evaluations.



## Members' centre

Electronic access to information and resources for members only, including the latest issue of *EJA*, issues of e-news, and access to the Directory of AES Members.



## AES Awards for Excellence in Evaluation

Members are eligible for nomination for the prestigious AES Awards for Excellence in Evaluation.



## Consultants' Directory

Members profile their evaluation services and consultancy through the online Consultants' Directory and receive tender information made available to the AES.



## Annual international evaluation conference

Evaluators stay in touch with the latest trends and issues in evaluation through the annual AES International Evaluation Conference, for which members receive advance notice and discounted registration fees.



## International links

Members are part of an international network of evaluation societies.

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# Corporate governance

## How we are governed

The Australian Evaluation Society is a charity registered with the Australian Charities and Not-for-profits Commission (ACNC). Since May 2015, the association has been a public company limited by guarantee after it transferred its registration as an association from the Australian Capital Territory. A Board of Directors provides overall governance and strategic direction for the organisation. The Board is legally responsible for governing the organisation. The Chief Executive Officer manages operations and has delegated responsibility for implementing the directions and decisions of the Board.

## Accountability of the Board

The Board is accountable to the membership of the AES. All members of the Board must adhere to the requirements of the ACNC and the *Australian Corporations Act 2001*, as well as the provisions set out in the AES Constitution and policies.

## Appointment of the Board

Following adoption of the new Constitution at the Special General Meeting in February 2015 and subsequent re-incorporation from the 2015 Annual General Meeting, the Board consists of three named office bearers (President, Vice President and Treasurer) and three ordinary Board members, all elected by the membership. The Board has the discretion to appoint up to three ordinary Board members, ensuring that at least two members of the Board are First Nations people and taking into account the overall mix of knowledge, skills and attributes of Board members.

## Role of the Board

The Board is subject to the provisions of the *Australian Corporations Act 2001*, its obligations to the ACNC and the AES Constitution. The Board may delegate certain powers to committees of members. All Board positions are unpaid.

## Indemnity of the Board

The AES has directors' and officers' insurance and professional indemnity for all Board members.

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# Board and staff

## Board members 2021–2022

### President

Kiri Parata

### Treasurer

Carina Calzoni

### Ordinary Board members

Anne Stephens

Eleanor Williams

Charlie Tulloch

Doyen Radcliffe

Nicole Tujague

### Meeting attendance

Kiri Parata	5 of 5
Carina Calzoni	4 of 5
Anne Stephens	5 of 5
Eleanor Williams	4 of 5
Charlie Tulloch	5 of 5
Doyen Radcliffe	2 of 4
Nicole Tujague	4 of 4

### Staff

#### Chief Executive Officer

Bill Wallace

#### Membership and Events Officer

Michelle Wightwick (until March 2022)

## President: Kiri Parata

Kiri's iwi (tribal) affiliations are Te Ātiawa ki Waikanae, Ngāti Toarangatira, Ngāti Raukawa, Ngāti Ruanui and Ngāi Tahu. Kiri's heritage is NZ Māori.

As an Indigenous evaluator and Māori health researcher, Kiri attributes her strengths to the mentoring and leadership she has received over the years from a number of dedicated Indigenous leaders.

Her career began working at a grassroots level through improving health services for Māori and marginalised communities. When the service Kiri managed was evaluated in 2004, her interest in evaluation was sparked.

Kiri's professional roles have included project management, Indigenous health research and evaluation and relationship management. Kiri is currently a PhD candidate with Massey University, New Zealand, investigating ancestral values, relationships with whenua (land) and wellbeing implications.

Since 2017 Kiri has been privileged to serve as an ordinary Board member initially, a member of the AES Indigenous Culture and Diversity Committee, and Vice President since 2020. During this time Kiri has supported the Board's strategic commitment to strengthen and build Indigenous capacity in the evaluation sector.

Two significant Board achievements during this period have been the development of the Reconciliation Action Plan and the soon-to-be launched Cultural Safety Framework. Kiri brings a sound and strategic approach to her roles and draws on her community development background and her commitment to social justice in her work.

Kiri lives with her whānau (family) on Gubbi Gubbi Country on the beautiful Sunshine Coast, Queensland. The majority of her work takes her back to Aotearoa New Zealand.

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**Treasurer: Carina Calzoni**

Carina is Managing Partner at Clear Horizon, a medium sized consultancy specialising in measurement, evaluation and learning. She has a Masters of Evaluation as well as qualifications in Public Policy and Applied Science and has 20 years of professional experience leading and consulting on evaluation and organisational change. The combination gives her the breadth of skills and knowledge to work adaptively across a range of specialist fields.

She has worked across many complex evaluations involving qualitative and quantitative methods, and program design and planning. She has an in-depth understanding of public policy and program design and implementation. She is a strong advocate for utilisation-focused approaches that support organisational learning and contribute to positive social and environmental change. She is passionate about helping organisations see the real value of good measurement and evaluation practice.

Since 1999 Carina has been an active member of the AES. She was WA regional representative for ten years (2008–2018), she has delivered many AES training courses, and in 2016 she convened the AES International Evaluation Conference in Perth.

Since 2019 Carina has enjoyed the privilege of being the Treasurer on the current AES Board. She brings to this role a solid knowledge of the evaluation industry as well as experience in directorship. To complement her practical skills, Carina completed the Foundations of Directorship with the Australian Institute of Company Directors (including units in Governance for Directors, Finance for Directors, and Strategy and Risk for Directors).

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# THE YEAR'S HIGHLIGHTS



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# FestEVAL21

Following the success of FestEVAL in 2020 – and the need to postpone another annual conference – the Board decided to deliver another FestEVAL to members and the wider evaluation community.

Like the previous year, FestEVAL21 delivered a week of free online activities in September celebrating evaluation. The event was coordinated by a working group of highly committed AES members, and involved all AES member networks in its activities. The FestEVAL21 working group developed the program and continued with the goals of making the week as light and fun as possible – building on the success and energy of last year’s FestEVAL.

FestEVAL21 aimed to provide opportunities for AES members to engage with others in the profession and support the AES in the conduct of its core business, including its Annual General Meeting.

The full week of virtual activities attracted 990 registrations (up from 780 in 2020) with more than 3,000 overall attendances across 23 sessions, and participants from at least 20 countries. 62% of delegates were AES members. The program included opening and closing plenary sessions, SIG meetings, the AES Annual General Meeting, various thematic presentations and the return of the night-time FestEVAL Club session offering informal networking.

The week’s activities began with the FestEVAL21 opening, featuring three provocations to stimulate thinking about the role of evaluation and ways it may need to evolve to improve evaluators’ effectiveness. The line-up of leading thinkers included Skye Trudgett (CEO of Kowa and Blak Impact Lead at the National Centre of Indigenous Excellence in Redfern), Margaret Crawford (Auditor-General of New South Wales) and Mary Abdo (Managing Director of the Centre for Evidence and Implementation in Singapore).

Each day of FestEVAL21 featured a number of sessions focusing on different topics, and the celebrations continued into the evening with the FestEVAL Club, ‘a relaxed place to drop in and chat with colleagues about evaluation issues’.

We would like to acknowledge the hard work of everyone involved in the week, especially the FestEVAL21 working group: Lewis Atkinson, Luke Condon, Evie Cuthbertson, Julie Elliott, Amy Gullickson, Donna Leigh Holden, Melissa Kaltner, Caroline Ladewig, Greg Masters, Lee-Anne Molony, Kiri Parata, Emily Saurman, Sunita Singh, Nolan Stephenson, Jill Thomas, Emily Verstage, Bill Wallace, Michelle Wightwick and Eleanor Williams.

The event enjoyed worldwide attendance, including delegates from:

- Australia
- Bangladesh
- Canada
- Dominican Republic
- Fiji
- Hong Kong
- India
- Indonesia
- New Zealand
- Nigeria
- Pakistan
- Philippines
- Saudi Arabia
- Singapore
- Sri Lanka
- USA
- Vietnam

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# Evaluation Journal of Australasia (EJA)

The *Evaluation Journal of Australasia (EJA)* has been through a period of transition over the past few years. During 2021–2022 a strategic review of the EJA was completed and several changes implemented, with new resourcing, editorial and governance structures established.

The publication schedule of the EJA has been successfully maintained in 2021–2022. Four issues of the journal consisting of 11 articles on a broad range of topics were published in this period. Each issue also contained an evaluator's perspective, book review and editorial.

A call for manuscripts on COVID-19 and its implications for evaluation practice resulted in four articles being published. Their respective topics were pivoting evaluation practice so it is conducted in real time, using rapid evaluation methods, using the Most Significant Change technique, and understanding the impact of COVID-19 on Western Australians with diabetes. This last article by Olson and colleagues was the most viewed and downloaded article (327 views/downloads) in 2021–2022.

The performance metrics for the EJA (provided annually by SAGE in October) show that readership of the journal in terms of circulation and online downloads remains stable, and that original submissions have increased from 2020, but not to the 2019 level. The number of articles published in 2021 was 11, compared with 15 articles in 2020 and 15 in 2019.

One outcome of fewer submissions being received, and fewer manuscripts being published, has been a slippage in the journal's SCImago rankings. In 2021 the EJA is now ranked in Quartile 3 (Development, and Sociology/Political Science categories), down from Quartile 2 in 2020.

## **Strengthening the editorial team**

There has been significant change in the EJA editorial team in 2021–2022 including two editors leaving the journal. Bronwyn Rossingh who had made a longstanding contribution as

Editor resigned in July 2021. Kylie Kingston who was instrumental in maintaining the operation of the journal through the transition period resigned as Associate Editor in June 2022 due to time pressures associated with a new academic appointment.

Several editorial appointments, including a new Editor, have been made to the editorial team. The team is now larger, comprising an Editor, four Associate Editors, a Managing Editor and an Editorial Assistant.

An Editorial Advisory Board consisting of 21 members (with representation from Australia, New Zealand, the United States and the United Kingdom) has been appointed and held its inaugural meeting in May 2022. These Board members will play key roles in building the reach and prominence of the journal as well as enhancing its quality. First Nations Board members are currently being sought.

## **Looking forward**

The editorial team is actively working to strengthen the quality of the journal and implementing strategies to increase the number of submissions. Special issues (one each in 2022, 2023 and 2024) are planned, and processes to strengthen the peer review and administration processes are underway. The Managing Editor role will ensure momentum in achieving this.

### *Editor*

*John Guenther*

### *Associate Editors*

*Kwadwo Adusei-Asante*

*Melissa Forbes*

*Kylie Kingston*

*Caroline Ladewig*

*Anthea Rutter*

### *Managing Editor*

*Jeffery Adams*

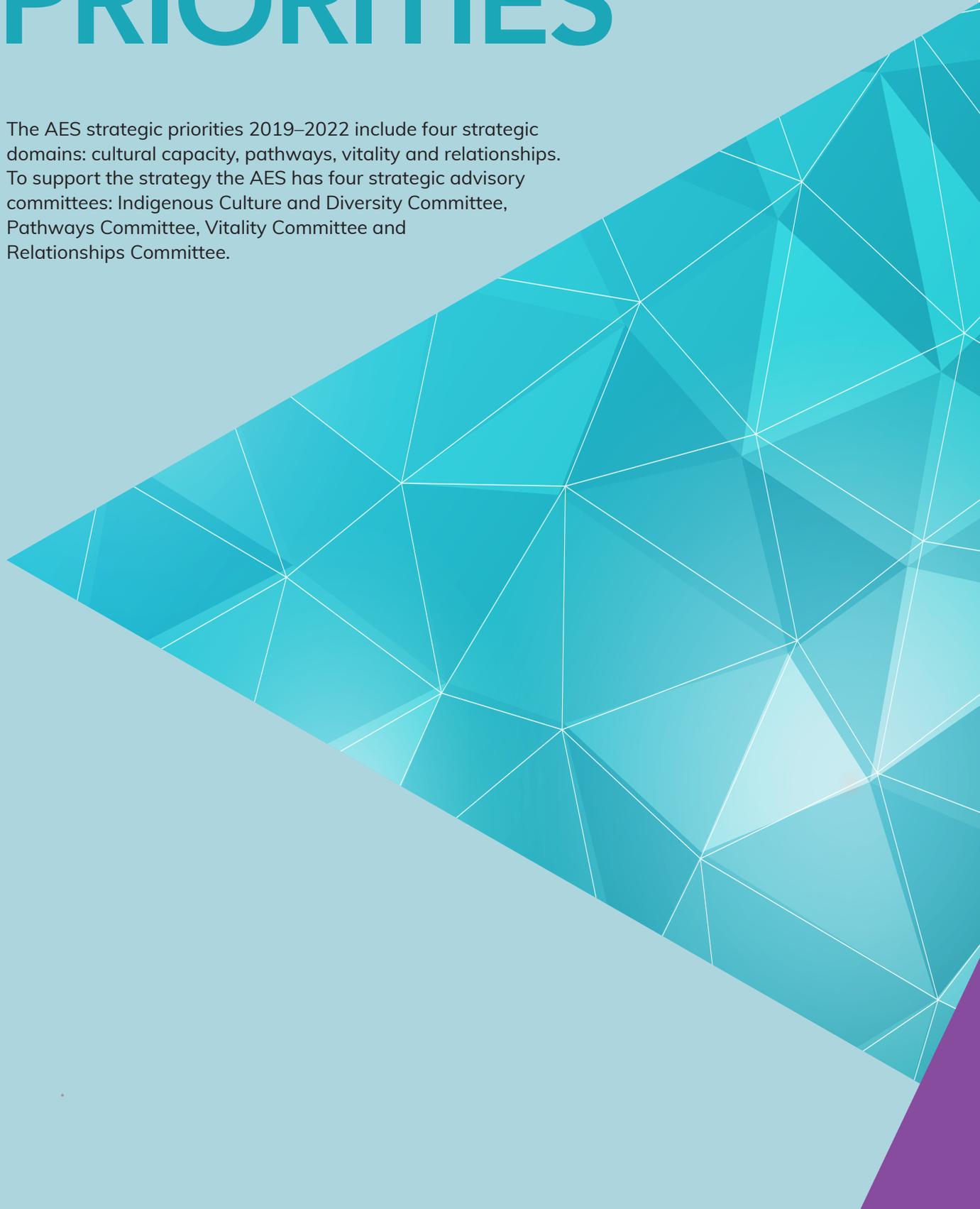
### *Editorial Assistant*

*Michelle Wightwick (to March 2022)*

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# STRATEGIC PRIORITIES

The AES strategic priorities 2019–2022 include four strategic domains: cultural capacity, pathways, vitality and relationships. To support the strategy the AES has four strategic advisory committees: Indigenous Culture and Diversity Committee, Pathways Committee, Vitality Committee and Relationships Committee.



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# Indigenous Culture and Diversity Committee

## Indigenous and non-Indigenous capacity in culturally safe evaluation theory, practice and use

During 2021–2022 the Indigenous Culture and Diversity Committee have not been able to meet as frequently over the year due to work commitments.

Our focus was on completing the First Nations Cultural Safety Framework and preparing for its launch on 31 August 2021.

This document has brought unity with the Indigenous Culture and Diversity Committee members, beyond (Kathleen Stacey & Associates Pty. Ltd.) as well as support from the AES Board members. We realise we can collectively achieve when we have a dream which we can share for the greater good.

beyond have ongoing workshops for all our AES members on how to work with this evaluation tool.

At our meetings we have also had discussions between ourselves as well as with the representative from the AES Pathways Committee mentoring working group to achieve a clear professional and career pathway for emerging Indigenous evaluators.

In June 2022 we started discussions on the conference support grants for the 2022 AES Conference which is to be held in Adelaide this year.

The Indigenous Cultural Diversity Committee will meet with the Indigenous Board Members to have a discussion in the coming weeks to plan for the next twelve months priorities for the AES strategic priorities.

### **Committee members**

Sharon Clarke  
Tony Kiessler  
Doreen Mandari  
Kiri Parata  
Doyen Radcliffe  
Marica Tabualevu  
Nicole Tajague  
Mark Watego  
Nan Wehipeihana

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# Pathways Committee

## Clear professional and career pathways

The Pathways Committee has completed several significant projects as set out in the AES strategic priorities.

By the conclusion of 2021 the AES Pathways Committee, in collaboration with Melbourne University had developed, tested, reviewed, finalised and published a renewed Evaluator Competency Framework. This project has attracted international attention.

Members are now able to self-assess their competencies against the seven domains of the framework using a criteria from not yet competent to master-level of skills and knowledge of evaluation practice. A report is provided that enables members to see their strengths and opportunities for development.

The framework was taken into consideration when Pathways Committee members conducted a review of the AES Professional Development workshops, resulting in complementing our current offerings with an additional 19 workshops to be introduced over the next three years. Topics include research methodology, systemic evaluation, trauma-informed evaluation, data visualisation and consultancy management.

The committee also undertook a pilot mentoring project which was completed and evaluated in 2022. Based on the recommendations of the evaluation, the AES Board agreed to implement the AES Mentoring Program on an annual basis with the support of a part-time administrator. The Mentoring Program for 2022 has commenced, with six mentor groups that have met between two to three times out of a total number of six sessions.

Several committee members will present updates of the working group activities at the AES International Evaluation Conference in 2022, and a series of journal articles for submission into the *EJA* are being prepared.

### *Looking ahead*

The Pathways Committee is undertaking a scan of evaluation standards documents published by the Voluntary Organization for Professional Evaluation (VOPE) and other evaluation organisations for compilation on the AES website. This comes after a scoping exercise that recommended against developing an AES set of professional standards for evaluators, and suggested that guidance for good evaluation practice can be provided to members through a well considered and comprehensive set of resources.

Pathways Committee members are also undertaking a review of new forms of support for evaluators that will continue into 2023.

### *Committee members*

George Argyrous  
Fran Demetriou  
Julie Elliott  
Amy Gullickson  
Del Lloyd  
David Roberts  
Taimur Siddiqi  
Anne Stephens (Chair)  
Jill Thomas  
David Turner  
Bill Wallace

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# Vitality Committee

## An organisation meeting diverse member needs today and tomorrow

In 2021–2022 the Vitality Committee has continued to bring together all jurisdictions to share activities between state and territory committees, and to work on key AES strategic priorities, including an ongoing focus on the following outcomes:

- Gaining a better understanding of members' needs and the issues they and the communities they serve face
- Enhancing member services and improving the reach across our geographically diverse membership.

The main project led by the Vitality Committee in 2021–2022 has been to develop a Diversity and Inclusion Strategy consisting of two components: a high level diversity and inclusion statement; and a membership strategy to ensure that the AES delivers an inclusive association that meets the diverse needs of its members and continues to attract members from a wide range of backgrounds and disciplines. This work was supported by a project working group co-chaired by Eleanor Williams and Florent Gomez, and included Eva Sarr, Gerard Atkinson, John Pilla, Lucy Walker and Eleanor Kerdo.

Allen + Clarke Consulting were commissioned to support this work and delivered draft documents at the end of the 2021–2022 financial year. These products will be launched at the 2022 AES International Evaluation Conference and provide the grounding to further develop the AES approach to diversity and inclusion into 2022–2023.

Looking to the year ahead, the Vitality Committee will continue to work to finalise, communicate, and embed the Diversity and Inclusion Strategy. The Committee will also focus on identifying seminar topics of interest across jurisdictions and facilitate multi-jurisdictional events.

### **Committee members**

Ruth Aston  
Jin Chen  
Janet Conte  
Christabelle Darcy  
Florent Gomez  
Kim Grey  
Robert Grimshaw  
Caroline Henwood  
Lisette Kaleveld  
Brian Keogh  
Ruth Nicholls  
Marie Nissanka  
John Pilla  
Tanja Porter  
Alison Reedy  
Sunita Singh  
Eleanor Williams (Convenor)

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# Relationships Committee

## Collaboration and partnerships to strengthen the field of evaluation

The Relationships Committee spent much of the 2021–2022 financial year progressing activity in line with the goals set out in the AES strategic priorities.

The committee significantly progressed the State of Evaluation – a strategic project with a focus on better understanding the evaluation sector, in which many AES members play a central role. The project seeks to understand the drivers and practice of evaluation across Australia as well as future directions for the sector.

KPMG has been engaged to progress this work and deliver key data collection activities. A presentation of emerging findings will be delivered at the 2022 AES International Evaluation Conference and a documented report will follow later in 2022.

Outside this project, the committee has stayed abreast of major shifts in the evaluation sector and formed various strategic relationships in order to promote evaluation. For example, the committee engaged on several occasions with representatives from the Department of Finance in the lead up to the finalisation and release of the Commonwealth Government's Evaluation Policy and Toolkit in 2022.

### *Looking ahead*

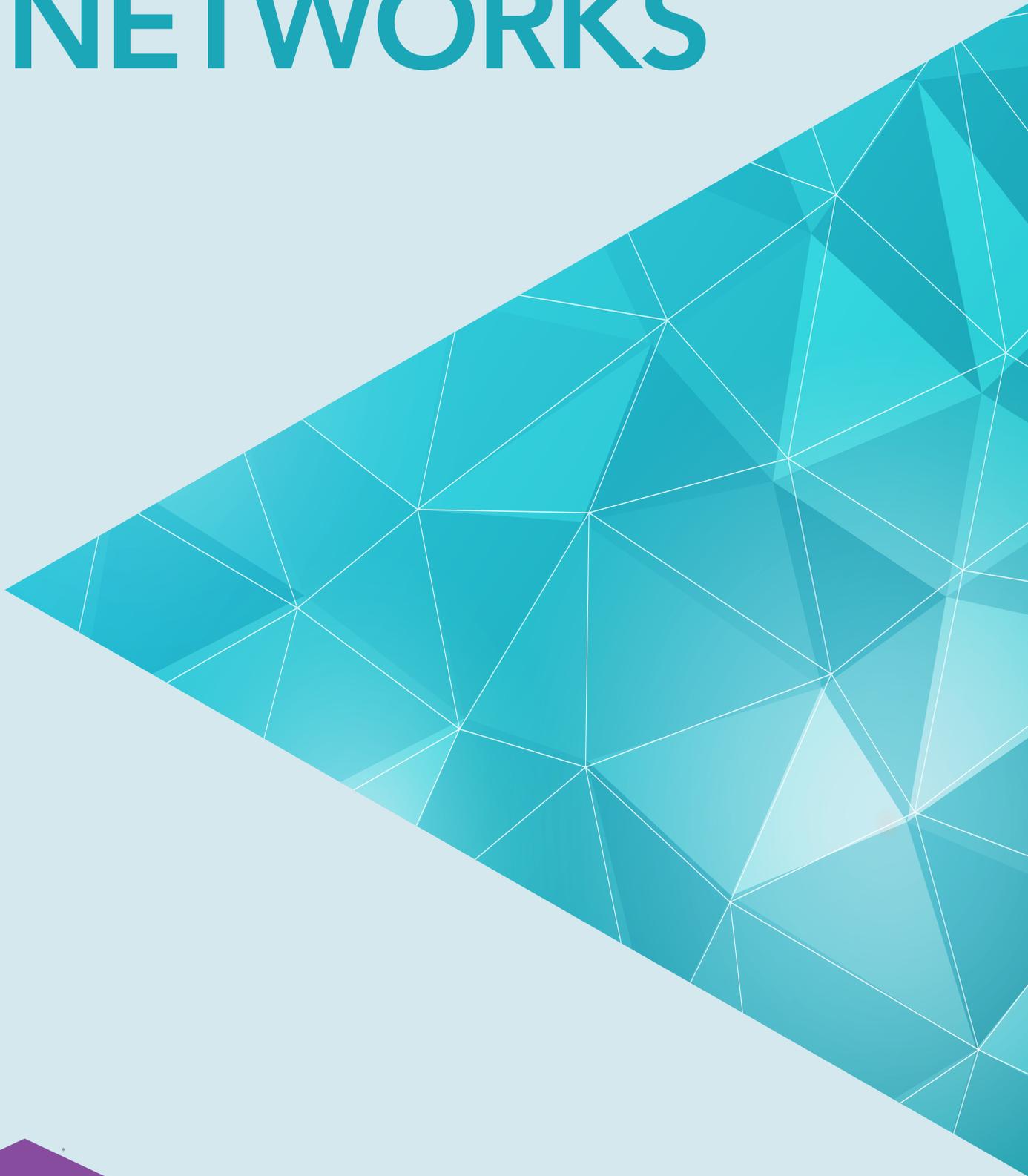
The committee's major focus for the remainder of 2022 is to complete the State of Evaluation report and to release it to the public. Once this report is complete, the committee will seek to use the findings for engagement with government, NGOs, corporate providers, education institutions, and other bodies involved in evaluation. In doing so, the AES seeks to promote evaluation practice, and in turn, supports improved policy delivery and measurement of outcomes and impact.

### *Committee members*

Luke Condon  
Kim Grey  
Becca Hardy  
Jade Maloney  
Tadhg McMahon  
Lee-Anne Molony  
Carlos Rodriguez  
Robert Sale  
Kara Scally-Irvine  
John Stoney  
Elliott Tester  
Charlie Tulloch

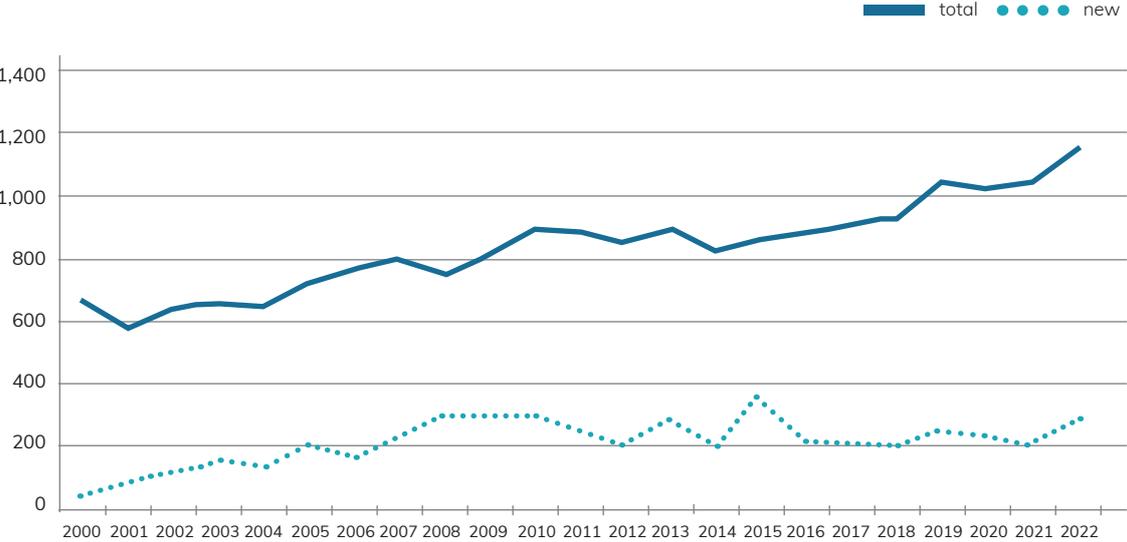
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# MEMBER NETWORKS

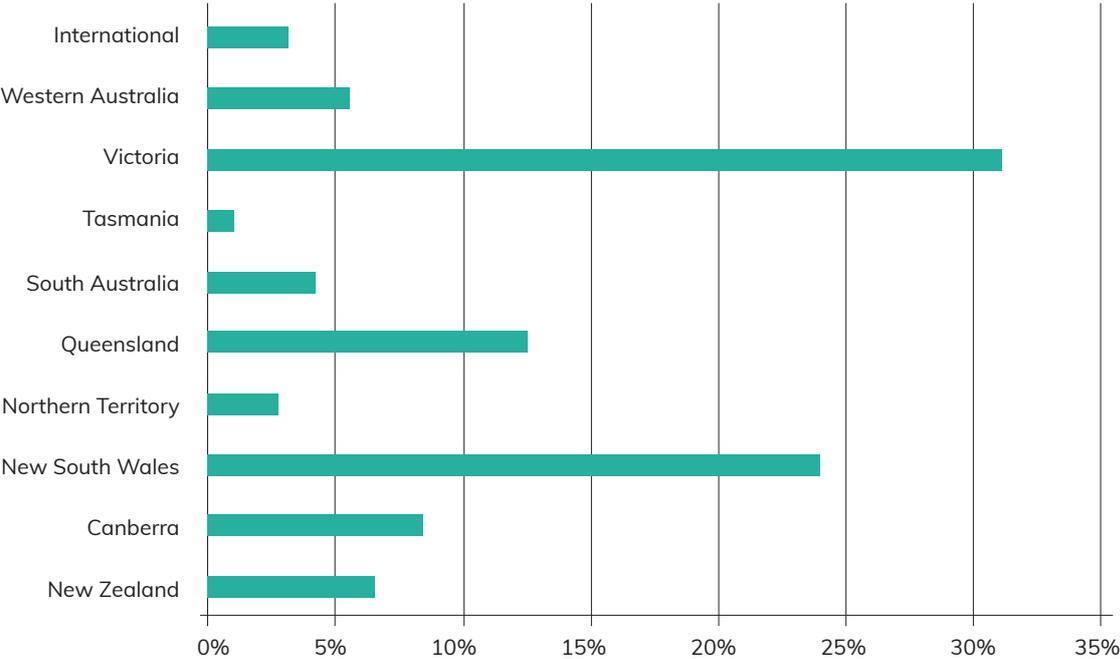


# Membership trends

## AES MEMBERSHIP NUMBERS 2000–2022



## MEMBERSHIP BY REGION 30 JUNE 2022



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# Regional networks

## AOTEAROA NEW ZEALAND

This financial year has been an extremely active one for the Aotearoa New Zealand Committee. We had two new Committee members (Sarah Appleton and Jeevan Karki) join us after the resignations of long-time members Liz Smith and David Turner in the previous financial year.

Kara Scally Irvine continues to play a key leadership role in the Relationships Committee; Sunita Singh was instrumental in shaping this year's FestEVAL21; and Marie Nissanka organised several online seminars and continues to represent the New Zealand chapter in the Vitality Committee. Elisabeth Poppelwell, Sarah Appleton and Jeevan Karki continue to provide much needed support in determining our future direction.

In 2022 we mourned the passing of April Bennett, a former AES Board Member and a formidable, principled evaluator who grounded her practice in the principles of social justice. April was a mentor to many and is fondly remembered.

We received plenty of positive feedback from attendees at the diverse range of free seminars we hosted. These included lunchtime 'drop-in' open discussion sessions held in August and October 2021 where participants could discuss anything related to research, monitoring and evaluation. Our online topic-based seminars had a high attendance rate and received plenty of compliments. A highlight of the financial year was the panel discussion organised by Marie Nissanka and Andrew Collins: 'Afghanistan – taking stock and looking forwards' held in November 2021 with subject matter experts Professor Jonathan Goodhand, Hafiza Yazdani and Joseph Schumacher. The session focused on the various international development efforts in Afghanistan and the future of continued interventions under the current political climate.

Held in February, our first event in 2022 was a practitioner-based methodological seminar hosted by David Fetterman, the founder of Empowerment Evaluation. This extended seminar provided many examples which illustrated the key concepts and approaches to Empowerment Evaluation in varying contexts (from India to USA), in various sectors (health, technology, social justice) and through different mediums. In March David Turner presented key insights from the AES mentoring pilot, and in May Jess Dart from Clear Horizon Consulting presented an evaluation approach for a long-term evaluation on social innovation. In June we invited Ana María Araos from Sensata UX Research (Columbia) to present on innovative methods of survey design. All Zoom seminars focused on global knowledge sharing and were very well received by attendees.

### Looking ahead

Due to COVID-19 all events were undertaken over Zoom during this financial year, however we are aiming to host more in-person events in 2022–2023. We will also look into opportunities to collaborate with ANZEA for some of our educational initiatives. We will continue to actively engage in seminars and workshops hosted by evaluation groups based in New Zealand and overseas to share knowledge and build relationships across the wider research and evaluation sector.

### Committee members

Sarah Appleton  
Jeevan Karki  
Marie Nissanka (Co-convener)  
Elisabeth Poppelwell  
Kara Scally Irvine  
Sunita Singh (Co-convener)

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## CANBERRA

We would like to take this opportunity to thank Tanja Porter for her leadership over several years as the Convenor of our committee. Tanja stepped down from the role in early 2022. We have also welcomed several new members to our local committee following an Expression of Interest process and are growing our ideas as a group, developing a refreshed, rolling calendar of events through regular meetings.

This year the Canberra Regional Network Committee has provided a range of face-to-face activities for local members, encouraging them to connect and enjoy meaningful discussion over a meal. This has been intentional to address feedback that many people have felt the need for face-to-face connection as we have eased out of lockdowns and social distancing restrictions.

Our program of activities in the last 12 months has included:

- a book group reading on Nan Wehipeihana and Kate McKegg's discussion of decolonizing evaluation, supporting our commitment to the AES Reconciliation Action Plan
- a seminar on complexity aware evaluation, presented by Julie Elliott
- contributing to FestEVAL21 with an evaluation quiz

- a Christmas gathering at the Hyatt Hotel. Although plans for croquet were hampered by the weather, the networking was enjoyed by those who braved the summer storm.

The Canberra Regional Network continues to play an active role in national AES activities, including involvement in the Vitality Committee, the State of Evaluation project, and the AES Mentoring Program.

In the coming year our aim is to have good engagement and support networking with our members at the upcoming conference in August 2022. We expect to continue our book group reading club, and explore opportunities for discussions about the State of Evaluation report (once it is launched).

### Committee members

Scott Bailey  
Gina Depretto  
Susan Garner  
Kim Grey  
Lorraine Heywood  
Julie Elliott  
Samantha Myers  
Ruth Nicholls  
Ruth Pitt  
Tanja Porter  
John Stoney

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## NEW SOUTH WALES (NSW)

Whilst part of the 2021–2022 financial year was again impacted by COVID-19, the NSW Committee maintained its commitment to actively support engagement of NSW members, in particular via the organisation of monthly free events focusing on peer-learning. Most successful events included: a joint event with SIMNA in August 2021 (196 participants split across two events); Survey design in February 2022 (140 participants); and Evaluative thinking in April 2022 (271 participants).

This year, the NSW Committee also delivered a buddy program which involved 11 pairs of buddies and 'evaluadders' meeting regularly between October 2021 and May 2022. Early results from the end of program survey indicated that most participants felt the program was beneficial to them.

The NSW Committee also continued to communicate to its members via an engaging newsletter (two editions this year, one in November 2021 and one in June 2022) to promote its free events as well as share some insightful evaluation content via interviews with EJA

contributors. An addition to the newsletter has been the profiling of individual NSW members to highlight the richness and diversity of our membership.

The NSW Committee also made sure to connect with NSW members to help them feel part of a community as well as being listened to, including via members surveys. Every new member was offered a brief phone conversation to discuss their expectations with their feedback being captured in an ongoing survey, which they could alternatively complete directly. This year the NSW Committee also reached out to its existing members between September and December 2021 via a similar process to maintain some personal connection despite the lack of face-to-face activities, and to gather feedback on how to further support member engagement. Both surveys were analysed in January 2022 (32 new members responses; 34 existing members – 20% response rate), with results informing NSW activities as well as being used as inputs to the development of a high-level AES membership strategy as part of the AES Diversity and Inclusion strategic project.

When asked about their current level of engagement, most existing members mentioned their own capacity as being the main driver, followed by topics of interest including from their own industry. Some members indicated that they were happy with their current level of engagement and satisfied, or even impressed with the current offerings. The free online events offered by the local committees were seen as a bonus and the FestEVAL21 a great addition, especially for emerging evaluators. A few members also expressed their satisfaction with the frequency and tone of the communications of the association:

*Very impressed, breath of fresh air, I am getting a lot from the association. There is also a warmth to it, in the communications from Michelle or Bill, or even the fact that you're taking the time to do it.*

[AES NSW existing member]

In September 2021 the NSW Committee put together a Terms of Reference document for the Committee to clarify expectations and responsibilities for committee members. It also specifies how members are selected, with involvement being confirmed in December each year. The Terms of Reference document has been shared with other regional committees via the Vitality Committee.

#### **Looking ahead**

The NSW Committee is committed to offering the same level of engagement with NSW members, in particular by maintaining monthly free events. The most popular format for those events seemed to be combining some content inputs as initial framing which then trigger opportunities for exchanges between participants via breakout groups. Importantly, those free events should be framed as peer-learning rather than formal training opportunities. Topics already identified for future monthly events include: evaluation approaches (building on Michael Quinn Patton recent videos on the topic), another joint session with SIMNA and the release of the new NSW evaluation guidelines.

#### **Committee members**

Laura Baker  
Ben Barnes  
Florent Gomez (Convenor)  
Greg Masters  
Gavin Faunce  
Melissa Kaltner  
Brian Keogh  
Linda Klein  
Jade Maloney  
Ruth McCausland  
Kath Vaughan-Davies  
Keren Winterford

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## NORTHERN TERRITORY (NT)

During 2021–2022 the NT Regional Network hosted a range of events, as well as encouraging members to attend the many online seminars offered by other jurisdictions.

In late 2021 the NT Regional Network events included:

- a cross-jurisdictional seminar in July 2021 sharing the learnings of whole-of-government approaches to evaluation being implemented across Australia
- key learnings from the evaluation of the ten-year NT-wide chronic conditions strategy in September 2021
- an in-person catch up at the Sailing Club in November 2021.

In 2022 the NT Regional Network has focused on hosting online seminars that explore the complexity of evaluation in the NT context. In March 2022 independent researcher Robyn Williams presented 'Negotiating culturally safe practice'. The seminar explored cultural safety as a decolonisation model of health care, specifically (but not exclusively) for Aboriginal and Torres Strait Islander peoples. The seminar was extremely relevant to the NT context and generated a lot of discussion. In addition it was also aligned with the AES key strategic priority to strengthen culturally safe evaluation processes and practices.

In May 2022 Lucy McGarry from the Barkly Backbone project and Pat Brahim, a Warumungu woman and chair of the native title group Patta Aboriginal Corporation in Tennant Creek, presented the seminar 'What "good" looks like in the Barkly. Designing an evaluation framework for the Barkly Regional Deal and its collaborative approach'. The seminar provided insights into the design and development of an evaluation framework for a range of initiatives delivered in Tennant Creek and the region, and also the process of effective community engagement, particularly with Aboriginal community members. The collaborative approach taken in the design of the framework was exemplified by the shared delivery of the seminar and by their frank and open discussion about the challenges, processes and benefits of collaboration. Members of the audience requested the presenters to come back with an update as their work progresses.

Both seminars in 2022 were well attended with strong audience engagement.

Looking ahead to 2022–2023, the NT Regional Network is excited about bringing an NT perspective to national evaluation discussions, with a particular focus on cultural capacity and collaboration.

### **Committee members**

Christabelle Darcy (Co-convenor)

Alison Reedy (Co-convenor)

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## QUEENSLAND

The Queensland Regional Network Committee held a range of online and in-person events throughout 2021–2022. Members of the committee supported several cross-jurisdictional virtual events, including a seminar on whole-of-government evaluation approaches and a FestEVAL21 discussion on evaluation ethics, enjoying the opportunity to collaborate with other regions and broaden the scope and reach of the events.

Following FestEVAL21 our first in-person networking event for Queensland members was successfully held in September 2021. It was great to come together again and reconnect with fellow evaluators and friends. A virtual networking event was also held to provide a further opportunity for members to engage from across Queensland. Exploring the opportunities of virtual events further, we held our first interactive session in February 2022 on 'Evaluation from afar' to reflect on and discuss the challenges, opportunities and insights from the year that was. Feedback from the session showed how

well it met participants' expectations and achieved the learning objectives.

The interactive session format was carried through to our in-person networking event held in April 2022. We enjoyed meeting some new faces to the Queensland evaluation community and discussing 'What is evaluation? Effectively communicating what we do'. The responses from participants on what they valued most about the event really say it all:

*Meeting people (in-person!) to talk about what we're doing and share our experiences. We're not alone :)*

*Meeting in person and how much thought had been put into the planning to make it a really lovely evening where it was easy to meet people!*

*Loved the conversations and networking. Thanks for facilitating this.*

Looking ahead to 2022–2023, it will be an exciting year as we get busy planning for the 2023 conference in Brisbane as well continuing to deliver engaging regional seminars and networking events.

#### **Committee members**

Samantha Abbato  
Kim Abbey  
Buthaina Al Kindi  
Lewe Atkinson  
Kylie Brosnan  
Jillian Cawse  
Natasha Doherty  
Rebecca Duell  
Jo Durham  
Robert Grimshaw  
Keryn Hassall  
Cherie Lamb  
Carla Loodewijk  
Mark Power  
Carol Quadrelli  
Sarah Renals  
Rebecca Roebuck  
Tonita Taylor  
Peter Weston  
Jackson White

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## **SOUTH AUSTRALIA (SA)**

During 2021–2022 the Committee has focused on two aspects of the strategic plan namely, vitality and pathways.

The Committee moved away from the conventional seminar format that would involve a speaker presenting an evaluation case study. Our program successfully moved to a more interactive program where participants were presented with an evaluation challenge or an evaluation idea for discussion to generate ideas that could be used in different contexts. The two open network events were successful in generating ideas for individuals to use in their own practice. One of the events focused on the AES Cultural Safety Framework and the other on evaluation challenges.

Looking ahead to 2022–2023, our aim is to continue to experiment with different ways of supporting members and for members to contribute to evaluation thinking. We will survey members post the conference and leverage the conference to grow local membership

#### **Committee members**

Jane Austin  
Jin Chen  
Donna Holden  
Mark Mackay  
John Pilla (Convenor)  
Emily Saurman  
Jessica Stevens  
Patricia Von Baumgarten

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## VICTORIA

During 2021–2022 the Victorian Committee has been active and committed to responding to the areas of professional growth identified by members. Responses to a survey asking members to identify topics of interest for monthly seminars has guided the Committee’s seminar planning, as has regular environmental scans of topical and important issues facing the evaluation profession.

### *Vitality and pathways*

The Victorian Committee has continued to deliver a strong program of seminars during 2021–2022. The end of 2021 saw an engaging discussion led by Alison Rogers on ‘Research findings from non-evaluators working in culturally diverse contexts’.

*It’s amazing to have an opportunity to hear about evaluation research, and particularly how it can inform our practice in Australia.*  
(Seminar participant)

At this time the Committee discussed whether Victoria would be returning to in-person seminars, continuing the online seminars or moving to a hybrid model. The Committee also went out to our broader membership at the beginning of 2022 seeking input to inform our seminar planning.

For 2022 seminars continued online, were highly attended and spanned a diverse range of topics from the theoretical, like Mathea Roorda’s ‘Towards developing evaluation criteria: a conversation about chosen values to the practical’, to Anne Markiweicz’s ‘Enhancing evaluative thinking and reasoning’.

Our final seminar of the year saw us move to a morning session to accommodate our presenters time zone with Liz Weaver from the Tamarack Institute in Canada leading a discussion on ‘Exploring collective impact initiatives and approaches to evaluate them – features, opportunities and challenges’. This was very well attended, with more than 100 participants, many of whom were enthusiastic about holding a workshop on collective impact.

### *Looking ahead*

At the beginning of 2022 Eleanor Williams accepted a position on the AES Board and stepped down as Co-convenor for the Victorian Committee with Ruth Aston stepping in. The Victorian Committee also said farewell to two long-standing Committee members: Charlie Tulloch and Jessica Hatley-Browne. At the time of writing this report, Committee members are currently planning to recruit new members, particularly targeting sectors of evaluation not currently represented, including but not limited to resource management.

In 2022–2023 we look forward to capitalising on the Committee’s renewed diversity to drive further membership growth and offer a continued program of seminars and information sharing to support evaluation excellence in the Victorian network and beyond.

### *Committee members*

Ruth Aston (co-convenor)  
Kerry Brogan  
Mandy Charman  
Kon Jew-Chung  
Gabrielle Johnson  
Jess Hateley-Browne  
Caroline Henwood (co-convenor)  
Alice Muller  
Ian Patrick  
Stuart Raetz  
Charlie Tulloch  
Eleanor William

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## WESTERN AUSTRALIA (WA)

During this financial year the WA Regional Network Committee has appointed a Co-convenor, Janet Conte – with Lisette Kaleveld and Janet now working as a team. The WA Committee is slightly smaller and will seek new members who can contribute.

The WA Committee has been keeping in touch mainly via email. We met as a committee via Zoom two times and in addition the Co-convenors have met twice in-person. End-of-year drinks were held as a face-to-face event, in which four committee members attended.

The seminar program for the year involved:

- A seminar titled 'Meaningful evaluation – a conversation with Dr Gianni Zappalà', held on 26 October 2021. The AES provided a small speaker's fee for Gianni to speak which helped to get a high-profile speaker. This seminar was a WA members only event even though it was online. It made the discussion quite intimate and worked really well to create the space we were hoping for. About 19 people attended.
- A cross-jurisdictional AES seminar (initiated/co-facilitated by the WA Regional Network) 'Navigating ethics as an evaluator' was presented at FestEVAL21 on 15 September. Presenters were Lisette Kaleveld (WA), Keryn Hassall (Qld), Keren Winterford (NSW), Rachael Laugery (NSW), Samantha Abbato (Qld) and Eleanor Williams (Vic).
- A reading discussion was held on 9 December 2021. The small group met to discuss the text 'Evaluation roots' – in particular part two of the introductory section 'An evaluation theory tree'. This literature was provided prior to the group meeting and a self-reflection activity was organised. About ten people attended.

- An end-of-year celebration was also held on 9 December following on from the 'Evaluation roots' reading group. This face-to-face event at the UWA Club was attended by ten people, with a mix of new and older members – and as such, it was a nice chance to welcome new faces.

In addition we have been advocating for more WA members to apply for awards – for both the IPAA award for evaluation as well as the AES Awards for Excellence in Evaluation. We have done this through promoting the opportunities word of mouth, and also have decided to facilitate presentations from award winners where possible.

Looking ahead to 2022–2023, we aim to recruit new committee members to the WA Committee, who can be active and potentially provide a better connection to the not-for-profit sector (a potentially less represented sector in the WA participation).

We will also continue to:

- encourage applications for awards (IPAA and AES)
- promote the mentoring program for emerging evaluators – it is now all online.

We hope for a mix of WA events as well as more opportunities to work with other states and territories on cross-jurisdictional events.

### Committee members

Janet Conte (Co-convenor)  
Penelope Cooke  
Rick Cummings  
Kevin Dolman  
Christina Kadmos  
Lisette Kaleveld (Co-convenor)  
Dorothy Lucks  
Theo Nabben  
Nolan Stephenson

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# Operational Working Groups

## AWARDS AND RECOGNITION WORKING GROUP

The Awards and Recognition Working Group (ARWG) has consolidated the review and institutionalisation processes undertaken over the COVID-19 related lockdown periods. The group identified five awardees in 2021, including one in the new category of Award for Enhancing the Social Good. The existing awards of Indigenous Evaluation and Publication have been reinvigorated, with a greater focus on Indigenous empowerment in the Indigenous Evaluation Award and through a partnership with the *Evaluation Journal of Australasia* for the Publication Award.

ARWG has three new members: Jess Kenway, Amanda Mottershead and Kym Hamilton. These new members ensure the group is at full complement, given the three members who left in 2020 and 2021. The new members bring expertise and new perspectives. Jess is an experienced working group member having served on the ARWG previously and having been awarded two of the AES Awards for Excellence. Amanda was the recipient of the Emerging New Talent Award in 2021. Kym Hamilton is an Indigenous evaluator who was a recipient of the AES conference scholarship support grant. All three new members bring fresh perspectives which are useful to the group.

The working group's documentation of its processes and procedures into a manual has helped with the induction of new members and in the conduct of its business.

ARWG supports the AES in its strategic priorities of pathways and cultural capacity. In relation to pathways, the identification and sharing of excellent practice is central to the work of the group. The awards identify excellent practice which supports AES members in the development of their own expertise. In relation to cultural capacity, the revitalised award suite has a stronger focus on culturally safe evaluation theory, practice and use. The empowerment of Indigenous communities in evaluations is more prominent in the refreshed Indigenous Evaluation Award and in the new Award for Enhancing the Social Good.

In 2022–2023 the working group aims to continue its consolidation process and recruit additional members to add to the strength of the group.

### Group members

Dana Cross  
Rick Cummings  
Farida Fleming  
Kevin Dolman  
Kym Hamilton  
Jess Kenway  
Amanda Mottershead  
Ian Patrick  
Mathea Roorda

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# Special Interest Groups

## DESIGN AND EVALUATION SPECIAL INTEREST GROUP

The Design and Evaluation Special Interest Group goes from strength to strength. We now have an estimated 300 members who regularly attend or participate in SIG activities. Our highlight event that has emerged over the last two years is our annual Learning Sprint, a rapid fire series of short sessions that helps to close out the year.

In December 2022 we ran our second Learning Sprint titled 'Design and evaluation on the edge: power, failure and washing machines!'. Feedback was overwhelmingly positive – with particular comments focusing on the structure of the Sprint (one hour each day on a discrete topic), the diversity of topics and their accessibility. With a similar number of attendees to 2021 (approximately 300 in at least one session), the SIG looks forward to offering another Learning Sprint in late 2023.

The SIG has also introduced a series (approximately quarterly) of lunchtime learning activities. We ran our first activity in March 2022 with over 100 attendees hearing from the speakers on the interface between design and evaluation. The interest from AES members is clearly still there for more on this topic and we look forward to another fantastic year.

In 2022–2023 we will continue our lunchtime learning series, including attending the 2022 AES International Evaluation Conference in Adelaide. Beyond this, we also have confirmed dates for the Learning Sprint for this year where we are considering a slightly different model to build on what we learned in 2021. Watch this space!

### Group members

Jess Dart  
Jo Farmer  
Matt Healey  
Ellie McDonald  
Shani Rajendra  
Nic Vogelpoel

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## MULTICULTURAL EVALUATION SPECIAL INTEREST GROUP

Formally established in November 2020, the Multicultural Evaluation Special Interest Group (MESIG) exists to enhance multicultural evaluation ideas, discussions, theories and practices, and provide a focus for sharing resources and learning about these topics within AES. Our definition of multiculturalism extends beyond ethnic and ancestral cultures to organisational cultures and other subgroups of people (such as members of the LGBTQI+, senior Australians, people with disabilities, youth and women) who share a similar context of oppression and/or being minoritized.

The MESIG also seeks to encourage greater diversity in the AES membership, and to provide a space for diverse voices to meet, discuss and learn. In these ways the MESIG aims to contribute to all four AES strategic priorities (cultural capacity, pathways, vitality and relationships).

During 2021–2022 the ambitions of the MESIG continued to be challenged by the uncertainty generated by the ongoing COVID-19 pandemic. Despite this, the MESIG continued to make progress: finalising a Terms of Reference and governance arrangements (in late June 2021); selecting chairs; meeting regularly; hosting a reading group; identifying and workshopping ideas for activities; and hosting events.

The MESIG membership strongly believe 'how we work together' is as important as 'what we achieve' if we are to truly embrace diversity and equity. We aim to provide a space for people to have 'deep' and safe discussions, connect with new people and learn more about racism, ableism, ageism, sexual discrimination, homophobia and other 'isms' that impact on the practice of evaluation. We also want to generate ideas for what individuals, the AES and the MESIG can do better.

Two highlights for the 2021–2022 period have included: a FestEVAL21 session focusing on multi-cultural evaluation; and, on 19 November, an online forum focusing on racial justice and decolonisation. The FestEVAL21 session titled 'Re-imagining multicultural evaluation – taking our practice to the next level' included guest speakers Professor Rodney Hopson, Katrina Bledsloe and Jane Davidson. There was a fantastic turn out, thriving discussion and chat – the results of these were used to develop a list of ten things that evaluators do to better promote multicultural evaluation, and this list was shared with participants. The online session titled 'How can evaluators organise for racial justice and decolonisation?' included guest speaker Vidya Shanker. It prompted lively and sometimes challenging discussions on race and privilege in the practice of evaluation. Again, the MESIG took notes and shared these with participants.

### *Looking ahead*

In 2022–2023 the MESIG is keen to continue and expand the dialogue around multicultural evaluation and equity in its broadest sense, and to support meaningful initiatives. Several MESIG members will be presenting at the 2022 AES International Evaluation Conference in Adelaide. The MESIG is also planning another online forum with a guest speaker focused on gender diverse communities.

### *Group members*

Erin Blake (Co-chair)  
Yonas Dare  
Katherine Dinh  
Jane Howard  
Godwin Masuka  
Mark Planigale  
Eva Sarr (Co-chair)  
Jerry Winston

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## SYSTEMS EVALUATION SPECIAL INTEREST GROUP

There is a growing interest amongst evaluators in what taking a systemic rather than systematic orientation in their practice entails. Systems thinking is the umbrella term used to signify the inclusion of the many, varied methods within hard, soft and critical systems approaches. Because of our theoretical lineage, systemic approaches to evaluation are not the norm.

The Systems Special Interest Group (SIG) promotes engagement with the methods and associated theory underpinning different systems and complexity science traditions and approaches to support systems thinking in practice. The vision of the Systems SIG is for evaluators to develop the agility to be able to pivot between prevailing evaluation practices premised on deterministic, linear programmatic approaches and the alternative practice informed by the theories, concepts and language of systems thinking and the complexity sciences.

To understand the challenges, opportunities and benefits of systems approaches across activities that form the logic of evaluation, we convene conversations about the fast growing complex systems sciences and its various interpretations, applications and entanglements with social inquiry. One of the benefits of these type of exercises is that they help evaluators consider the assumptions underpinning their current practices. There are currently 165 members.

During 2021–2022 we convened a series of online events covering a wide range of presenters and topics. Typically these events feature group discussion to support the development of professional networks, ongoing collaboration and to strengthen the field of evaluation.

The first event in July 2021, led by Professor Ray Ison, was a discussion on systems thinking in evaluation practice. Professor Ison is an Australian-British Cybernetician and systems scholar/scientist, and Professor of Systems at the Open University in the UK.

Anne Stephens led the next event with the theme 'Practice matters; the ethics involved in doing what you want to do when systems thinking is at the core of our practice' (August 2021). Anne is the lead author of UN Women's 'Inclusive Systemic Evaluation for Gender equality, Environments and Marginalized voices' (ISE4GEMs).

In September 2021 the SIG Committee presented at FestEVAL21. This presentation offered a whirlwind introduction to systems evaluation. It incorporated 'Waves and maps for systems and complexity'; 'Systems evaluation compared to other types of evaluation'; 'Systems leadership'; and 'Results based accountability – an entry point and one straightforward approach to systems thinking for evaluation in action'. The presentation attracted non-SIG members as well as current members.

An interview with Luke Craven was the focus of the October event. Luke is a strategic designer, researcher and systems change practitioner. He discussed core issues for systems and systems evaluation.

New Zealand members Matt Walton and Kara Scally-Irvine facilitated a session on systems thinking and complexity theory (December 2021). Matt and Kara are systems thinking and complexity research and evaluation practitioners. Their discussion drew on the *New Directions for Evaluation* special issue, 'Systems and complexity informed evaluation: insights from practice' (Volume 2021, issue 170), that Matt co-edited. While the special issue identified three common themes emerging from systems practice (setting boundaries around what is included and excluded; using concepts and theories to enhance program and evaluation theory; and broadly drawing upon systems thinking and the complexity sciences to inform systems change and develop capacity within organisations) it concluded that there is a need for deeper engagement with theories and methods while simultaneously remaining accessible for evaluators.

Kathryn Dinh facilitated a discussion on 'An Eastern paradigm of evaluation and systems thinking' in February 2022. This was based on Kathryn's PhD 'Culturally responsive evaluation: a theoretical approach relevant to South East and East Asia' and the book *Buddhist and Taoist systems thinking: the natural path to sustainable transformation* (Routledge 2021).

Lewe Atkinson facilitated a conversation with Professor Gerald Midgley on systems thinking and evaluation in March 2022. Professor Midgley is a British organizational theorist, professor of systems thinking, director of the Centre for Systems Studies at the University of Hull, and past president of the International Society for the Systems Sciences.

Andrew Hawkins facilitated a book club based on a Russell Ackoff video in June 2022. Russell Ackoff, Anheuser-Busch Professor Emeritus of Management Science at the Wharton School, University of Pennsylvania was a pioneer in the field of operations research, systems thinking and management science. The video gave a historical account of the western worldview leading up to the systems worldview.

### **Looking ahead**

While continuing to be accessible for evaluators, deeper engagement is required with more detailed methods and associated theory underpinning different systems and complexity science traditions and approaches. With an incremental increase in the maturity of systems thinking and complexity science within evaluation, more comprehensive case examples of contemporary application are anticipated.

We will continue to provide online events to stimulate interest in the systemic worldview, its various interpretations, applications and entanglements with social inquiry, highlighting its diverse contemporary uses within evaluation. We will use collaborative events to explore, discuss and learn about systems evaluation in a comprehensive, practical and informed way and to consider what future directions the field might take.

### **Group members**

Lewe Atkinson  
Julie Elliott  
Andrew Hawkins  
Brian Keogh

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## AUSTRALIAN PUBLIC SECTOR EVALUATION NETWORK

There are now over 500 members in the Australian Public Sector Evaluation Network (APSEN), which aims to provide a dedicated informal network to connect those working in evaluation in the public sector to share information and build capability across the membership. We continue to receive enquires regarding APSEN membership across Australia. The APSEN SIG was launched at the FestEVAL21 event in September 2020. APSEN email member updates to provide a valuable opportunity for members to share evaluation job opportunities and highlight evaluation training or networking opportunities.

The APSEN Sharepoint site (<https://ausevaluationsociety.sharepoint.com/>) has been well received by APSEN members and has been consistently accessed by network members throughout 2021–2022. The key priorities for the site were: to develop additional content; launch an APSEN chat forum enabling APSEN members to ask questions and directly engage with each other; and include an evaluation skills profile within the APSEN membership directory.

The APSEN Steering Group met regularly during 2021–2022, with the last formal meeting held in February 2022. The next meeting is planned for September 2022. We are now focused on re-engaging with members and look forward to catching up in person with members at the 2022 AES International Evaluation Conference in Adelaide.

### *Looking ahead*

We will trial a new 'staying-in-touch' strategy with members by sending out a weekly APSEN News email update on Tuesdays – with the support of new membership managers Karyn Stamp and Thomas Whitting. Commonwealth committee members recently introduced the Commonwealth evaluation policy and toolkit, and we will be focusing on next steps around staff training and cross-jurisdictional capability development. A list of planned APSEN activities for 2022–2023 will be developed and circulated to Committee members.

### *Group members*

Michael Amon  
Zoe Bishop-Kinlyside  
Peita Bonato  
Martin Bortz  
James Burchmore  
Raoul Craemer  
Christabelle Darcy  
Gavin Fauce (current co-Chair)  
Florent Gomez  
Eleanor Kerdo  
Josephine Norman (current co-Chair)  
Katherine Pontifex  
Nolan Stephenson  
Ashley Ubrihien

# AES Life Members and Fellows

In 2021 the AES welcomed the following five new Fellows – the most since the Fellows were established in 2003:

Lyn Alderman  
Janet Clinton  
Jess Dart  
Dorothy Lucks  
Nan Wehipeihana

It was particularly pleasing to welcome Nan as the first Indigenous Fellow.

Four of the AES fellows, Alan Woodward, Penny Hawkins, Scott Bayley and Rick Cummings completed the Mentoring Program Pilot with 22 emerging evaluators as mentees. The evaluation report of the pilot program identified the program as worthy of continuing and three Fellows, Alan Woodward, Dorothy Lucks, and Rick Cummings are involved as mentors in 2022.

#### *Fellows Coordinating Committee*

Anona Armstrong  
Rick Cummings (Coordinator)  
Zita Unger

#### **Life Members**

Anona Armstrong  
Ian Trotman

#### **AES Fellows**

Lyn Alderman	Queensland, 2021
Anona Armstrong	Victoria, 2003
Scott Bayley	Aust. Capital Territory, 2016
Darrel Caulley†	Victoria, 2005
Janet Clinton	Victoria, 2021
Rick Cummings	Western Australia, 2013
Jess Dart	Victoria, 2021
Sue Funnell	New South Wales, 2003
Penny Hawkins	Wellington, 2009
Dorothy Lucks	Western Australia., 2021
Anne Markiewicz	Victoria, 2015
Chris Milne	New South Wales, 2003
Jenny Neale†	Wellington, 2015
John Owen	Victoria, 2003
Patricia Rogers	Victoria, 2016
Anthea Rutter	Victoria, 2016
Colin Sharp	South Australia, 2003
Ralph Straton	Western Australia, 2004
Ian Trotman	Wellington, 2003, Emeritus
Zita Unger	Victoria, 2013
Yoland Wadsworth	Victoria, 2007
Nan Wehipeihana	Wellington, 2021
Gill Westhorp	Tasmania, 2018
Jerome Winston	Victoria, 2004
Alan Woodward	New South Wales, 2019

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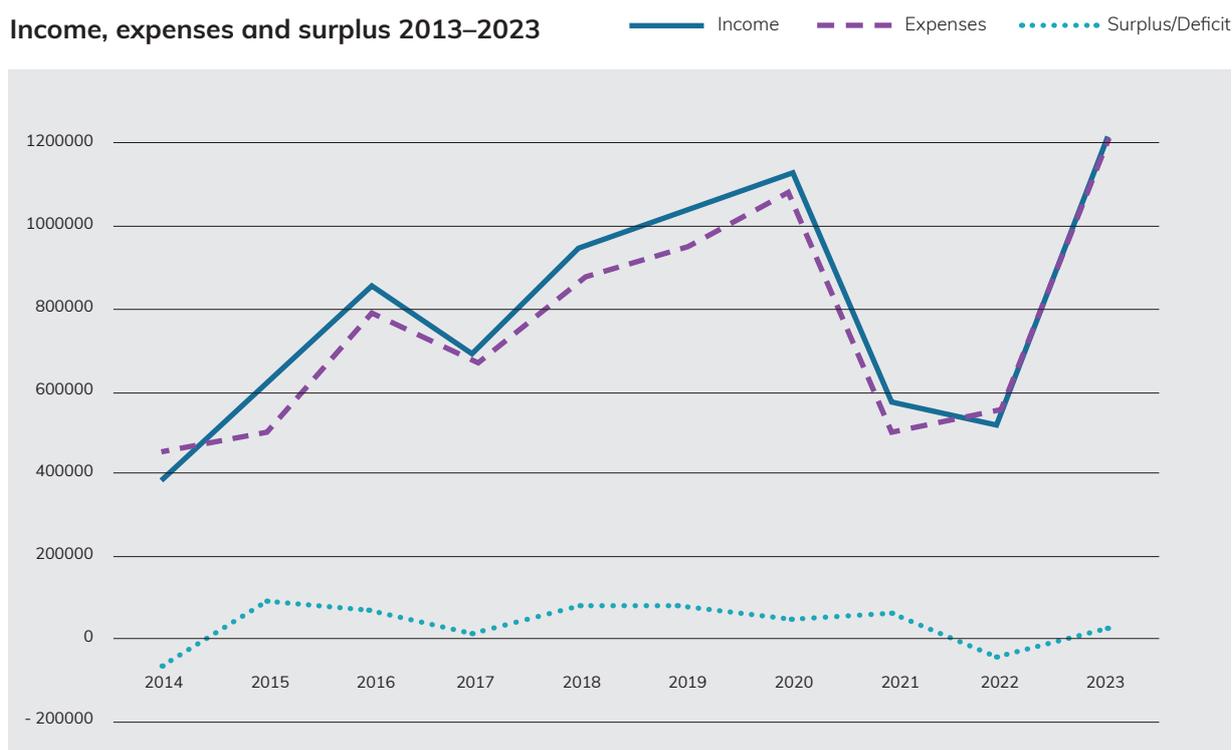
# FINANCIAL REPORTS



# Finance summary

	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23 Budget
<b>INCOME</b>							
Prof development	147,498	172,780	324,542	158,392	244,257	249,220	240,000
Conference income	361,286	593,572	488,755	717,016	NIL	NIL	720,210
Memberships	156,997	167,487	186,475	191,531	209,224	231,312	220,000
Publications	17,913	14,463	20,814	23,043	22,014	27,908	33,000
Other Income	267	197	197	43,235	90,819	8	10
<b>Total Income</b>	<b>683,961</b>	<b>948,499</b>	<b>1,020,783</b>	<b>1,133,217</b>	<b>566,314</b>	<b>508,448</b>	<b>1,213,220</b>
<b>EXPENDITURE</b>							
Prof development	88,076	111,626	186,757	111,229	112,718	125,692	130,000
Conference/projects	309,797	426,880	388,087	572,167	NIL	NIL	550,336
Strategic projects	20,000	1,326	28,516	29,090	21,582	34,461	41,700
Memberships	1,520	2,084	3,169	3,457	3,061	18,743	28,000
Publications, inc EJA	24,040	33,120	30,734	53,173	54,425	52,801	58,000
Other expenses	924				466		
<b>SUB-TOTAL</b>	<b>444,357</b>	<b>575,036</b>	<b>637,263</b>	<b>769,116</b>	<b>192,252</b>	<b>231,697</b>	<b>808,036</b>
Admin/Governance	231,840	295,050	308,037	312,977	311,486	319,610	382,250
<b>Total Expenditure</b>	<b>676,197</b>	<b>870,086</b>	<b>945,300</b>	<b>1,082,093</b>	<b>503,738</b>	<b>551,307</b>	<b>1,190,285</b>
<b>SURPLUS / (LOSS)</b>	<b>7,764</b>	<b>78,413</b>	<b>75,483</b>	<b>51,124</b>	<b>62,576</b>	<b>(42,859)</b>	<b>22,933</b>

Income, expenses and surplus 2013–2023



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# Annual Financial Report

AUSTRALIAN EVALUATION SOCIETY LTD  
ABN 13 886 280 969  
AS AT 30 JUNE 2022

Prepared by V.P. Cannizzaro & Co - Certified Practising Accountants

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## ASSETS AND LIABILITIES STATEMENT

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2022  
ACCRUAL BASIS

	Notes	2022	2021
<b>ASSETS</b>			
<b>CURRENT ASSETS</b>			
<b>Cash and Cash Equivalents</b>			
ANZ V2 Account		79,247	79,139
ANZ Business Account		566,224	515,203
<b>Total Cash and Cash Equivalents</b>		<b>645,471</b>	<b>594,342</b>
<b>Trade and Other Receivables</b>			
Trade Debtors		25,504	9,327
Prepayments		289,262	113,892
<b>Total Trade and Other Receivables</b>		<b>314,766</b>	<b>123,219</b>
<b>TOTAL CURRENT ASSETS</b>		<b>960,237</b>	<b>717,561</b>
<b>NON-CURRENT ASSETS</b>			
<b>Plant and Equipment and Vehicles</b>			
Art Collection		2,500	2,500
Less Accumulated Depreciation & Impairment on Art Collection		(453)	(345)
Office Furniture & Equipment		19,495	21,703
Less Accumulated Depreciation on Office Furniture & Equipment		(15,825)	(16,158)
<b>Total Plant and Equipment and Vehicles</b>		<b>5,717</b>	<b>7,700</b>
Intangibles	4	14,723	16,304
<b>TOTAL NON-CURRENT ASSETS</b>		<b>20,440</b>	<b>24,003</b>
<b>TOTAL ASSETS</b>		<b>980,677</b>	<b>741,564</b>
<b>LIABILITIES</b>			
<b>CURRENT LIABILITIES</b>			
Trade and Other Payables	5	401,549	134,692
GST Payable		31,392	10,837
Employee Entitlements	6	27,381	32,822
<b>TOTAL CURRENT LIABILITIES</b>		<b>460,322</b>	<b>178,351</b>
<b>TOTAL LIABILITIES</b>		<b>460,322</b>	<b>178,351</b>
<b>NET ASSETS</b>		<b>520,355</b>	<b>563,213</b>

The accompanying notes form part of these financial statements. These statements should be read in conjunction with the attached compilation report.

## ASSETS AND LIABILITIES STATEMENT CON'T

	Notes	2022	2021
<b>MEMBER'S FUNDS</b>			
<b>RETAINED PROFITS</b>			
Retained Earnings Beginning of Year		563,213	500,637
Current Year Earnings		(42,859)	62,576
<b>TOTAL RETAINED PROFITS</b>		<b>520,355</b>	<b>563,213</b>
<b>TOTAL MEMBER'S FUNDS</b>		<b>520,355</b>	<b>563,213</b>

## INCOME AND EXPENDITURE STATEMENT

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2022  
ACCRUAL BASIS

	Notes	2022	2021
<b>INCOME</b>			
Interest Income		8	7
Government Subsidies – COVID-19		–	90,812
Membership Fees		231,312	209,224
Publication Sales		27,908	22,014
Workshop Income		249,220	244,257
<b>TOTAL INCOME</b>		<b>508,448</b>	<b>566,314</b>
<b>EXPENDITURE</b>			
Administration & Governance		314,732	304,377
Cost of Publications		52,801	54,425
Depreciation		4,878	7,575
Membership Services		18,743	3,061
Special Projects (including Conferences + Support Grants)		34,461	21,582
Workshops		125,692	112,718
<b>TOTAL EXPENDITURE</b>		<b>551,307</b>	<b>503,738</b>
<b>CURRENT YEAR SURPLUS / (DEFICIT)</b>		<b>(42,859)</b>	<b>62,576</b>
<b>CURRENT YEAR SURPLUS / (DEFICIT) ATTRIBUTABLE TO MEMBERS</b>		<b>(42,859)</b>	<b>62,576</b>

The accompanying notes form part of these financial statements. These statements should be read in conjunction with the attached compilation report.

## MOVEMENTS IN EQUITY

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2022  
ACCRUAL BASIS

	Notes	2022	2021
<b>EQUITY</b>			
Opening Balance		563,213	500,637
<b>Increases</b>			
Profit / (Loss) for the Period		(42, 859)	62,576
<b>Total Increases</b>		<b>(42, 859)</b>	<b>62,576</b>
<b>TOTAL EQUITY</b>		<b>520,355</b>	<b>563,213</b>

## STATEMENT OF CASH FLOWS

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2022

	Notes	2022	2021
<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>			
Receipts from Members and Customers		502,018	588,990
Payments to Suppliers and Employees		(449,452)	(484,172)
Interest Received		8	7
<b>NET CASH INFLOW FROM OPERATING ACTIVITIES</b>		<b>52,574</b>	<b>104,825</b>
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>			
Fixed assets acquired		(1,445)	(8,646)
<b>NET CASH INFLOW</b>		<b>51,129</b>	<b>96,179</b>
Cash and Cash Equivalents as at 1 July 2021		594,342	498,163
<b>CASH AND CASH EQUIVALENTS AS AT 30 JUNE 2022</b>		<b>645,471</b>	<b>594,342</b>

# NOTES TO THE FINANCIAL STATEMENTS

AUSTRALIAN EVALUATION SOCIETY LTD  
AS AT 30 JUNE 2022  
ACCRUAL BASIS

## 1. Summary of Significant Accounting Policies

The financial statements cover Australian Evaluation Society Limited as an individual entity. Australian Evaluation Society Limited is a not-for-profit entity incorporated in Victoria under Corporation Act 2001 and reporting under Australian Charities and Not For Profits Commission Act 2012 ('the Act'). In the opinion of the Board of Directors, Australian Evaluation Society Limited is not a reporting entity since there are unlikely to exist users of the financial report who are not able to command the preparation of reports tailored to satisfy specifically all of their information needs. These special purpose financial statements have been prepared to meet the reporting requirements of the Act. The financial statements have been prepared in accordance with the disclosure requirements of AASB 101 Presentation of Financial Statements, AASB 107 Statement of Cash Flows, AASB 108 Accounting Policies, Changes in Accounting Estimates and Errors and AASB 1054 Australian Additional Disclosures. We have not assessed if the financial statements comply with all the recognition and measurement requirements of the Australian Accounting Standards.

The financial statements have been prepared on an accruals basis and are based on historical costs modified, where applicable, by the measurement at fair value of selected non-current assets, financial assets, and financial liabilities. Significant accounting policies adopted in the preparation of these financial statements are presented below and are consistent with prior reporting periods unless otherwise stated.

### Income Tax

The Entity is exempt from income tax under Division 50 of the Income Tax Assessment Act 1997.

### Property, Plant and Equipment (PPE)

Each class of property and office equipment are carried at cost less, where applicable, any accumulated depreciation.

The depreciable amount of all PPE is depreciated over the useful lives of the assets to the entity commencing from the time the asset is held ready for use.

### Impairment of Assets

At the end of each reporting period, the Board of Directors reviews the carrying amounts of its tangible and intangible assets to determine whether there is any indication that those assets have been impaired. If such an indication exists, an impairment test is carried out on the asset by comparing the recoverable amount of the asset, being the higher of the asset's fair value less costs to

sell and value in use, to the asset's carrying amount. Any excess of the asset's carrying amount over its recoverable amount is recognised in the income and expenditure statement.

### Employee Provisions

Provision is made for the entity's liability for employee benefits arising from services rendered by employees to the end of the reporting period. Employee provisions have been measured at the amounts expected to be paid when the liability is settled.

### Cash on Hand

Cash on hand includes cash on hand, deposits held at call with banks, and other short-term highly liquid investments with original maturities of three months or less.

### Accounts Receivable and Other Debtors

Accounts receivable and other debtors include amounts due from members as well as amounts receivable from donors. Receivables expected to be collected within 12 months of the end of the reporting period are classified as current assets. All other receivables are classified as non-current assets.

### Revenue and Other Income

Revenue is recognised when the amount of the revenue can be measured reliably, it is probable that economic benefits associated with the transaction will flow to the entity and specific criteria relating to the type of revenue as noted below, has been satisfied.

Revenue is measured at the fair value of the consideration received or receivable after taking into account any trade discounts and volume rebates allowed.

Revenue from the sale of goods is recognised at the point of delivery as this corresponds to the transfer of significant risks and rewards of ownership of the goods and the cessation of all involvement in those goods.

Interest revenue is recognised using the effective interest method.

Membership fees are payable annually in advance and are due on the Anniversary of the month of joining. Membership fees are treated as income when the subscription is received except when the membership exceeds one year. Income received in respect of memberships exceeding one year are carried forward as income in advance (current liability) and recognised in the subsequent period. Fees received from new members whose membership has not been approved prior to year-end are brought to account as income in advance (current liability) and carried forward to the year in which the membership is approved.

These notes should be read in conjunction with the attached compilation report

Conference and Seminar events income and expenditure are recognised in the year that the event is held. Events income and expenditure which is received or expended prior to year-end, but which relates to an event to be held after year end, is recognised as income in advance (current liability) and conference expenses prepaid (current or non-current asset) and is carried forward to the year in which the event is held. Where conference administration is outsourced, income received and expenditure incurred by the conference organiser prior to year-end, but which relates to a conference to be held after year end, have not been recognised.

Government grants and subsidies income is recognised when the entity obtains control over the funds, which is generally at the time of receipt. Grants relating to expense items are recognised as income over the periods necessary to match the grant to the costs they are compensating.

If conditions are attached to the grant that must be satisfied before the entity is eligible to receive the contribution, recognition of the grant as revenue will be deferred until those conditions are satisfied.

All revenue is stated net of the amount of goods and services tax.

#### Goods and Services Tax (GST)

Revenues, expenses and assets are recognised net of the amount of GST, except where the amount of GST incurred is not recoverable from the Australian Taxation Office (ATO). Receivables and payables are stated inclusive of the amount of GST receivable or payable. The net amount of GST recoverable from, or payable to, the ATO is included with other receivables or payables in the assets and liabilities statement.

#### Accounts Payable and Other Payables

Accounts payable and other payables represent the liability outstanding at the end of the reporting period for goods and services received by the association during the reporting period that remain unpaid. The balance is recognised as a current liability with the amounts normally paid within 30 days of recognition of the liability.

	2022	2021
<b>2. TRADE AND OTHER RECEIVABLES</b>		
Prepayments		
Prepayments	289,262	113,892
Total Prepayments	289,262	113,892
<b>TOTAL TRADE AND OTHER RECEIVABLES</b>	<b>289,262</b>	<b>113,892</b>
	2022	2021
<b>3. PLANT AND EQUIPMENT, MOTOR VEHICLES</b>		
Plant and Equipment		
Plant and Equipment at Cost		
Art Collection	2,500	2,500
Less Accumulated Depreciation + Impairment on Art Collection	(453)	(345)
Office Furniture & Equipment	19,495	21,703
Less Accumulated Depreciation on Office Furniture & Equipment	(15,825)	(16,158)
Total Plant and Equipment at Cost	5,717	7,700
<b>TOTAL PLANT AND EQUIPMENT</b>	<b>5,717</b>	<b>7,700</b>
<b>TOTAL PLANT AND EQUIPMENT, MOTOR VEHICLES</b>	<b>5,717</b>	<b>7,700</b>

These notes should be read in conjunction with the attached compilation report

	2022	2021
<b>4. INTANGIBLES</b>		
<b>Website costs</b>		
Website Development	18,299	18,299
Less Accumulated Amortisation	(15,136)	(13,555)
<b>Total Website Costs</b>	<b>3,163</b>	<b>4,744</b>
<b>Other Intangibles</b>		
Formation Expenses	11,560	11,560
<b>Total Other Intangibles</b>	<b>11,560</b>	<b>11,560</b>
<b>TOTAL INTANGIBLES</b>	<b>14,723</b>	<b>16,304</b>

	2022	2021
<b>5. TRADE AND OTHER PAYABLES</b>		
<b>Trade Payables</b>		
Accounts Payable	20,833	5,000
<b>Total Trade Payables</b>	<b>20,833</b>	<b>5,000</b>
<b>Other Payables</b>		
ANZ Credit Card	10,586	5,942
Prepaid Income	363,209	113,835
Sundry Creditors	6,921	9,915
<b>Total Other Payables</b>	<b>380,716</b>	<b>129,692</b>
<b>TOTAL TRADE AND OTHER PAYABLES</b>	<b>401,549</b>	<b>134,692</b>

	2022	2021
<b>6. EMPLOYEE ENTITLEMENTS</b>		
PAYGW Payable	3,498	4,604
Provison for Annual Leave	5,811	10,363
Provision for Long Service Leave	18,072	17,855
<b>TOTAL EMPLOYEE ENTITLEMENTS</b>	<b>27,381</b>	<b>32,822</b>

These notes should be read in conjunction with the attached compilation report

## TRUE AND FAIR POSITION

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2022

### Annual Statements Give True and Fair View of Financial Position and Performance of the Entity

We, Kiri Parata and Carina Calzoni being members of the Board of Directors of Australian Evaluation Society Ltd, certify that –

The statements attached to this certificate give a true and fair view of the financial position and performance of Australian Evaluation Society Ltd during and at the end of the financial year ending on 30 June 2022.



Signed



Signed

Dated 12 August 2022

# BOARD OF DIRECTORS REPORT

AUSTRALIAN EVALUATION SOCIETY LTD  
FOR THE YEAR ENDED 30 JUNE 2022

## Principal Activities

The principal activities of the entity during the financial year were:  
Promote Ethics and Standards in evaluation practice in Australia and New Zealand Advancing Social or Public Welfare.

## Significant Changes

No significant changes in the nature of the entity's activity occurred during the financial year

## Operating Result

The loss for the financial year amounted to \$42,859.

## Going Concern

### Covid-19

The global Covid-19 pandemic and the subsequent restrictions imposed by the Australian and overseas governments have caused disruption to businesses and economic activity.

The Australian Evaluation Society has managed, and continues to actively manage, the risks arising from Covid-19. This includes reducing planned spending and moving fee-paying activities online. We have sufficient cash on hand and cashflow to operate for at least another two years. There have not been any significant adverse operational or financial impacts as a result of the Covid-19 pandemic to date and any known impacts to date have been reflected in the 30 June 2022 financial statements.

As at the date these financial statements are authorised for issue, the directors of Australian Evaluation Society consider that the financial effects of any potential changes cannot be reasonably estimated for future financial periods. As the situation remains fluid, due to the evolving changes in government policy and business and customer reactions thereto, the directors consider that the general economic impacts arising from Covid-19 and lower levels of forecast activity are likely to continue to negatively impact the financial results of Australian Evaluation Society over the near term.

Based on the current assessment as of the date of signing the financial report, the directors have concluded that the going concern basis of accounting is appropriate as the negative impact of the pandemic on the organisation is expected to be manageable.

## Committee Members

The names of each person who has been a committee member during the year and to the date of this report are:

Kiri Parata, President  
Carina Calzoni, Treasurer  
Anne Stephens  
Eleanor Williams  
Doyen Radcliffe  
Nicole Tujague  
Charlie Tulloch

Signed in accordance with a resolution of the Members of the Board on:



Kiri Parata (President)



Carina Calzoni (Treasurer)

Dated 12 August 2022

# Compilation Report

## Australian Evaluation Society Ltd For the year ended 30 June 2022

Compilation report to Australian Evaluation Society Ltd.

We have compiled the accompanying special purpose financial statements of Australian Evaluation Society Ltd, which comprise the asset and liabilities statement as at 30 June 2022, income and expenditure statement, the statement of cash flows, a summary of significant accounting policies and other explanatory notes. The specific purpose for which the special purpose financial statements have been prepared is set out in Note 1.

### The Responsibility of the Board of Directors

The Board of Australian Evaluation Society Ltd are solely responsible for the information contained in the special purpose financial statements, the reliability, accuracy and completeness of the information and for the determination that the basis of accounting used is appropriate to meet their needs and for the purpose that financial statements were prepared.

### Our Responsibility

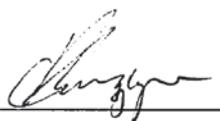
On the basis of information provided by the partners we have compiled the accompanying special purpose financial statements in accordance with the basis of accounting as described in Note 1 to the financial statements and APES 315 *Compilation of Financial Information*.

We have applied our expertise in accounting and financial reporting to compile these financial statements in accordance with the basis of accounting described in Note 1 to the financial statements. We have complied with the relevant ethical requirements of APES 110 *Code of Ethics for Professional Accountants*.

### Assurance Disclaimer

Since a compilation engagement is not an assurance engagement, we are not required to verify the reliability, accuracy or completeness of the information provided to us by management to compile these financial statements. Accordingly, we do not express an audit opinion or a review conclusion on these financial statements.

The special purpose financial statements were compiled exclusively for the benefit of the Board who are responsible for the reliability, accuracy and completeness of the information used to compile them. We do not accept responsibility for the contents of the special purpose financial statements.



VP Cannizzaro & Co

Fellow Certified Practising Accountants & Chartered Tax Advisor

PO Box 606, Carlton South Victoria 3053

Vito Cannizzaro

Dated: 09 /08 / 2022

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# Auditor's report

B P R A U D I T P T Y L T D  
G 0 3 1 2 - 1 4 C A T O S T R E E T ,  
H A W T H O R N E A S T , V I C  
A U S T R A L I A 3 1 2 3  
T E L E P H O N E 6 1 3 9 8 3 6 8 8 2 4  
I N F O @ B P R A U D I T . C O M . A U  
W W W . B P R A U D I T . C O M . A U  
A B N 3 2 0 8 9 8 5 5 7 4 7



## INDEPENDENT AUDITOR'S REPORT

### TO THE MEMBERS OF AUSTRALIAN EVALUATION SOCIETY LTD

#### Opinion

We have audited the accompanying financial report, being a special purpose financial report of Australian Evaluation Society Ltd (the Entity), which comprises the statement of assets and liabilities as at 30 June 2022, the statement of income and expenditure, statement of movements in equity and statement of cash flows for the year then ended, notes to the financial statements, including a summary of significant accounting policies and managements' assertion statement.

In our opinion, the accompanying financial report gives a true and fair view of the financial position of the Entity as at 30 June 2022, and of its financial performance and cash flows for the year then ended in accordance with the financial reporting requirements of the Australian Charities and not for profits Commission Act 2012.

#### Basis for Opinion

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Report section of our report. We are independent of the Entity in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 Code of Ethics for Professional Accountants (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

#### Emphasis of Matter – Basis of Accounting

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist Australian Evaluation Society Ltd to meet the requirements of the Australian Charities and not for profits Commission Act 2012. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

#### Responsibilities of Management and Those Charged with Governance for the Financial Report

Management is responsible for the preparation and fair presentation of the financial report in accordance with the financial reporting requirements of the Australian Charities and not for profits Commission Act 2012 and for such internal control as management determines is necessary to enable the preparation and fair presentation of a financial report that is free from material misstatement, whether due to fraud or error.

In preparing the financial report, management is responsible for assessing the Entity's ability to continue as a going concern, disclosing, as applicable, matters relating to going concern and using the going concern basis of accounting unless management either intends to liquidate the Entity or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Entity's financial reporting process.



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#### **Auditor's Responsibilities for the Audit of the Financial Report**

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

As part of an audit in accordance with Australian Auditing Standards, we exercise professional judgment and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial report, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Entity's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Entity's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Entity to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.



Bernie Rohan  
Director

BPR Audit Pty Ltd  
(Authorised Audit Company)  
Reg. No. 311673  
G03, 12-14 Cato Street  
Hawthorn East VIC 3123

Dated: Aug 14, 2022

BPR AUDIT PTY LTD  
G03 12-14 CATO STREET,  
HAWTHORN EAST, VIC  
AUSTRALIA 3123  
TELEPHONE 61 3 9836 8824  
INFO@BPRAUDIT.COM.AU  
WWW.BPRAUDIT.COM.AU  
ABN 32 089 855 747



**AUDITOR'S INDEPENDENCE DECLARATION  
UNDER SECTION 307C OF THE CORPORATIONS ACT 2001  
TO THE BOARD OF DIRECTORS OF  
AUSTRALIAN EVALUATION SOCIETY LTD**

I declare that, to the best of my knowledge and belief, during the year ended 30 June 2022, there have been:

- a. no contraventions of the auditor independence requirements as set out in the Corporations Act 2001 in relation to the audit; and
- b. no contraventions of any applicable code of professional conduct in relation to the audit.

A handwritten signature in black ink, appearing to read 'Bernie Rohan', is positioned above the printed name.

Bernie Rohan  
Director

BPR Audit Pty Ltd  
(Authorised Audit Company)  
Reg. No. 311673  
G03, 12-14 Cato Street  
Hawthorn East VIC 3123

Dated: Aug 14, 2022



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Australian Evaluation Society Limited  
PO Box 476, Carlton South VIC 3053  
100 Leicester Street, Carlton VIC 3053

ABN 13 886 280 969  
ACN 606 044 624

