Conference Committee's Report on the Canadian Evaluation Society 2009 Annual Conference
Ottawa May 31-June 3 2009

Revised September 14th 2009

Contents

1. Introduction

The National Capital Chapter of the Canadian Evaluation Society (CES NCC) hosted the 2009 CES Annual Conference in Ottawa between May 31 and June 3 2009. The purpose of this document is to report on the key strengths and lessons learned of the conference, with the view of informing future Conference organizers and CES National. Additional information is available from the Conference Co-chairs on request.

The key sources of data for this report included:

- Written individual feedback from several Core Committee members, the Green Committee, Willow Group (which served as the Conference Secretariat) as well as the individual who managed the in-conference evaluation process;
- The results of two conference participant surveys (one administered during the conference, and the second administered one week after the conference); over 400 of all conference participants (or almost 60%) responded to one of the surveys.
- The minutes of a CES National hosted meeting of 2009, 2010, 2011 and 2012 Conference organizers held on June 2, 2009; and
- Feedback from Core Committee members on a draft version of the report on September 9, 2009

This report has five sections including this introduction. The second section provides a profile of the 2009 conference and related statistics; the third and fourth sections provide an overview of the strengths and lessons learned from the 2009 Conference as well as suggestions that may assist future Conference organizers. The final chapter provides a limited number of recommendations for future conference organizers and the CES National Council's Board of Directors. To Suggestions to future Annual Conference Organizing Committees are presented in **bold** throughout this report.

2. Profile of 2009 CES Conference

2.1 2009 Conference Theme and Audiences

The theme of the 2009 Conference was "Value in evaluation". It had four sub themes:

- Evaluation Value for Government;
- Evaluation Value for Larger Society;
- Evaluation Value for the International Stage; and
- Ensuring Value through a Stronger Profession.

The Conference was originally intended to serve two audiences: evaluators and user/s consumers of evaluation services (including Members of Evaluation Committees, ADMS, Directors General and other senior members in federal government departments). Original plans included a tailor made symposium for the latter audience; this plan was aborted in early 2009 based on informal consultations with potential participants regarding the likely demand for such an offering. Due to several changes in the evaluation context within the Government of Canada, including the establishment of Evaluation Committees within federal government departments, decision makers' interest in original ideas waned.

A job fair was also considered but was abandoned after consulting local National Capital Region (NCR) employers; government departments (the major employer in the NCR) expressed very limited interest in participation in such an event. This was due, in part to sensitivities related to a shortage of evaluators in the NCR at the time of the consultations (late 2008).

2.2 2009 Conference Objectives

The Conference had several explicit quantitative objectives:

- Attract 450 delegates, achieving a net benefit of roughly $70,000 for the overall event;
- Within the 450 target, 20% or 90 registrants will be new members to/for CES; and
- Attract an additional 45 non/new members for the half day symposium.

The Conference also had a number of qualitative objectives:

- That 2009 Conference delegates would have a better appreciation for what evaluation can do and does do and its value; that they would have a better understanding of the role and value for evaluation in other developed and developing jurisdictions; and that they would have a stronger appreciation for the caliber, stature and value of evaluation in the Canadian Context.
- That the 2009 Conference would enhance the image, stature and perception of the role/value of evaluation within the Government of Canada.
- That the 2009 Conference would contribute to the CES National Council strategic plan, having regard for priorities and plans in effect for the 2008-09 fiscal year and beyond.

2.3 2009 Conference Management structure

The Conference was managed by a Core Committee, which consisted of two Conference Co-Chairs, the Treasurer, the CES National Council Representative as well as the heads of all Conference Committees, including the following:

- Program and Workshops (a.k.a. Program Committee);

- Administration, Evaluation, Hospitality and Social (a.k.a. Admin Committee);
- Marketing, Promotions and Sponsors.
- Symposium

The Conference also had a number of Special Advisors including a two person Green Committee.

2.4 2009 Conference Context

Planning for the 2009 conference began in 2006 under the leadership of two Conference Co-chairs and a group of Core Committee members. Between 2006 and 2008, this group took responsibility for establishing a solid foundation for the conference by making various decisions including establishing Conference themes, selecting the logo, selecting and negotiating a contract with the Westin Hotel, developing a budget and draft conference schedule, recruiting and contracting the Conference Secretariat (Willow Group) and recruiting volunteers for Conference sub Committees.

There was considerable interest in attending the CES Annual Conference in 2009 for several contextual reasons including:

- The heighted interest in evaluation in 2009 within the federal government because of the launch of the Evaluation Policy by the Treasury Board Secretariat in April 2009;
- The growth in the number of new evaluators in NCR due to a major recruitment exercise by the federal government since 2006; and
- The fact that the 2009 Conference was held in the NCR (which accounts for approximately 25% of CES membership).

Despite some Core Committee member concerns about the potential effects of the 2009 global recession and/or health scares on conference attendance, these did not have any notable effects on 2009 Conference.

3. What Worked Well

3.1 Overall

Overall, the 2009 Conference was judged to be a success. The conference attracted over 700 participants, noted to be the greatest number of registrants in the history of CES Annual Conferences. This is attributed to a combination of incentives and contextual factors including the financial incentives for early bird registrations, the venue, the program and the heightened interest in evaluation noted above. Many pointed out that the sheer number of delegates created a great positive excitement (or buzz) throughout the Conference. The Conference also increased CES membership by 347, which vastly exceeded targets (by almost 250%).

The Conference also generated approximately $96,000[1] in net benefits – this compares very favorably with CES annual conferences in previous years. The net benefit exceeds the planned amount by approximately 40%.

The survey results indicated very high levels of participant satisfaction in many areas. As shown in Exhibit 3.1, more than 80 percent of survey respondents were satisfied with various components and dimensions of the conference, the only exception being the pre-conference workshops (78 percent satisfied). The social events and administrative/support functions received the highest satisfaction ratings. The keynote speaker and the concurrent sessions obtained satisfaction ratings of 94% and 87% respectively. It should be noted that the order of these results changes significantly if they are sorted according to the percentages of the very satisfied. As indicated, the percentages of respondents who are "very satisfied" are significantly high for the administrative functions and the social events (generally above 50 percent), but lower for the content of the conference sessions.

[1] Based on information available at September 9, 2009

Exhibit 3.1 Participants' Satisfaction with CES 2009 Conference

Survey Results: Level of Satisfaction (In Percentages)

	Very Dissatisfied	Dissatisfied	Satisfied	Very Satisfied		Total satisfied
Sunday opening reception and benefit auction	1.7	0	43.2	55.1		98.3
Registration and Information Desk	1.3	2.2	41.1	55.3		96.4
Monday evening dinner and entertainment	0	4	27	69		96
Food and beverage included in your registration	0.9	3.6	32.1	63.3		95.4
Conference facilities	1.3	3.5	37.6	57.5		95.1
Opening Keynote – Michael Quinn Patton	1.3	5.2	26	67.5		93.5
On-Line Registration	2.2	5.5	43.4	48.9		92.3
Morning run or walk	9.1	0	27.3	63.6		90.9
Haunted Tour of Ottawa	4	8	28	60		88
Concurrent Sessions	1.4	11.5	63.2	23.9		87.1
Relevance of the topics to your practice	1.1	12.2	55.5	31.2		86.7
Management of the sessions	0.9	12.3	48.4	38.3		86.7
Quality of the sessions	1.8	13.4	60.1	24.7		84.8
Range of paper / panel / poster choices	0.9	14.7	57	27.3		84.3
Thematic Breakfast	1.2	14.7	50.3	33.7		84
Delegate Kit	3	14.4	54.2	28.4		82.6
Morning yoga	11.8	5.9	17.6	64.7		82.3
Plenary Discussion: CES Credentialed Evaluator	4.1	13.9	50.3	31.7		82
Conference Website	2	16.1	60.1	21.8		81.9
Plenary Discussion on the Renewed Federal Policy on Evaluation	3.4	15.7	53.9	27		80.9
Pre-Conference Workshops	5.2	16.8	47.1	31		78.1

Source: Survey of Conference Participants

n=403 (some questions were answered by less respondents as they only applied to a limited number of conference participants)

Some selected quantitative highlights of the conference are provided in Exhibit 3.2. For the majority of the indicators, 2006 forecasts were exceeded. However, there were notable shortfalls in a couple of areas: sponsor and booth revenues. This reflects in large part, a continued reliance on CES' traditional Conference supporters and the use of relatively passive, established marketing strategies. **Future Conference organizers are encouraged to experiment with new revenue generating approaches, strategies and target groups.**

Exhibit 3.2 CES 2009 Annual Conference Highlights

Indicator/variable	2006 Forecast	Actual at September 2009	Actual/Forecast (%)
Number of paid registered conference participants	450	648[2]	144%
Number of paid pre conference workshops	157	236	150%
Total Conference Revenues Generated	$326,812.50	$393,089.00	120%
Total Conference Profits	$70,000	$96,000	137%
New CES Members	90	347	867%
Number of Pre Conference Workshops	16	16	100%
Number of panels/Presentations	130	118	91%
Number of Thematic Breakfast Themes	5[3]	14	280%
Total number of sponsors[4]		10	
Total value of revenues generated from sponsors	$15,000	$13,270	88%
Total number of booths	10	6	60%
Total revenues raised from booths	$8,000	$4,262.50	53%
CESEF Revenues	$4000[5]	$9000	225%
Total number of volunteers (including Core Committee members)[6]		84	

3.2 Core Committee Meetings and Management

In the nine months prior to the Conference, the Core Committee met regularly for about 1 hour per month to guide and monitor Conference planning and make decisions as required. These

[2] In addition, approximately 60 individuals who volunteered during the Conference were permitted to attend the Conference at no cost.

[3] It was not possible to plan the number of thematic sessions, as these are proposed and managed by Conference participants. However, for comparative purposes, there were 5 sessions at the 2008 Conference.

[4] The Core Committee did not set a target for the number of sponsors

[5] There was no specific target set for 2009. For comparative purposes, $4000 was generated in 2008.

[6] There was no specific \target set.

meetings were very helpful in identifying and reviewing Committee and sub-committee priorities, actions and deadlines, flagging and resolving challenges, and generating creative ideas aimed at improving the conference. Regular interactions of Committee members also helped to build and maintain a strong sense of shared ownership and objectives in making the Conference as good as possible. In the last couple of months prior to the conference there was more frequent communication by the Core Committee as a whole and among various sub-sets of Committee members to oversee various activities.

Initially, meeting minutes were written up following each meeting, but these were eventually replaced by detailed lists of required follow up actions and responsibilities for team members. These lists were prepared by the Conference Secretariat and updated and reviewed at each meeting. **Future organizers should consider having these notes prepared and distributed more quickly after each meeting (1-2 days) as a way of reminding individuals of their responsibilities.**

The Core Committee (and other committees) was assisted by the Conference Secretariat which has a long and detailed corporate memory of what has worked and not worked in previous conferences. Whenever in doubt, we had a seasoned and experienced group to turn to for advice, support, ideas, and information on "how they did it last time" (including copies of previous types of correspondence and so forth etc). Following the 2009 Conference, the Secretariat realized that the time it had spent supporting Committees exceed that planned by 55.5 hours, or 183%. While the contract with the Secretariat did not oblige the Chapter to compensate the Secretariat for this time, there were no effective mechanisms in place to monitor and report on this overage to the Core Committee. **We encourage future Annual Conference organizers and Secretariats to pay much closer attention to estimating the need for Committee support, and to monitoring and reporting on this variable on a monthly basis, and taking corrective actions as required to keep within budget.**

3.3 Program Committee

The program committee was responsible for identifying the main parameters of the program and selecting the various resources that populated the program, including the types of activities and associated speakers. It should be mentioned that a number of activities were not directly managed by the committee, including the activities related to the case competition and the various award ceremonies. The key program items under the direct responsibility of the committee were the keynote speakers, the pre-conference workshops, the concurrent sessions and the posters.

3.3.1 Keynote speakers

As discussed later in this report, the selection of the keynote speakers was a challenging process. At some point, this task was delegated to the conference co-chairs, who received suggestions from the Conference committee and other individuals. The process started in September 2008 but it took several months before obtaining firm confirmations.

3.3.2 Call and selection process of presentations and workshops

Some of the key features of the call include the conditions related to conference fees (it was decided that all presenters would pay to enter the conference, except for the pre-Conference workshop presenters) and the selection criteria, that encouraged the participation of “junior” evaluators.

The call for presentations was highly successful, with over 150 submissions of all types (papers, panels, expert lectures, debates, etc.).

A small number of presentations were received after the second deadline (a one-week extension was given to all and was announced before the initial end date). It was decided that only the submissions of “exceptional value” would be retained for selection. This is a common practice in academia. A special jury was assembled for this purpose. The reviewers used two criteria: the (level of) international reputation of the presenters; and the topic of the presentation (those deemed of great value/importance for CES members were accepted). Two late proposals were accepted based on these criteria.

A selection process was conducted using a group of ten experienced evaluators. The reviewers were divided into groups that each reviewed and scored a subgroup of presentations (an international subgroup of papers and three domestic subgroups). Each presentation was assessed by at least three reviewers. The following criteria (and points) were used:

- Relevance to theme: 5 points max
- Expected usefulness of presentation: 10 points max
- Knowledge/experience of presenters: 5 points max
- Quality of text of proposal: 5 points max
- Participation of junior presenter (less than 2 years of evaluation experience): 2 points (insert 2 or leave blank if not or unknown)
- Likely popularity (attendance) (1=low- 2=medium- 3=high)

The heads of the program committee reviewed the scoring and made adjustments (in consultation with senior evaluators) if significant variances were observed between reviewer scores. The proposals were then ranked according to their scores. The final selection of presenters was made based on the scores. The number of proposals submitted by presenters was also considered (some individuals submitted up to six papers).

The workshops were selected using less formal criteria. The background (experience) of the presenters, their proposed themes, workshop length and language of presentation were considered.

After the selection process was complete, the resulting final list of presenters was reviewed and confirmed by the program committee members and emails were sent to those who submitted the papers to announce the result of the selection. Later, a short text providing advice on how to make successful presentations was sent out. Unfortunately, this did not ensure a consistent level of quality of presentations.

3.3.3 Program Development

Building the program itself was a tedious exercise as 142 presentations were accepted. The type of presentation (paper, panel, etc) and presentation length were considered when slotting the presentations in the program. The program was also built by dividing (sorting) the presentations according to the following types: International, Health, Education, Non-profit, Methods, Performance measurement, French presentations, Safety, and other. This approach was chosen as it was deemed more representative of the field of interests of the individual participants. Each conference slot (room session) lasted approximately 90 minutes and included groups of presentations of each of these types. The committee also tried to ensure that the presentations likely to be most popular were spread out across the three conference days to avoid “lumping” the most popular presentations together (i.e., presented at the same time in separate rooms).

The management of the presentation selection process and program building process was done using an excel sheet. The sheet was an excel sheet populated using the information contained in the online proposal submission form; it was equivalent to a database of the proposals, with new fields added for selection and other purposes.

After building the program, presentation descriptions were edited and session chairs were selected. As discussed later, these were challenging tasks.

3.4 Admin Committee

3.4.1 Promoting the Conference

With the assistance of the Conference secretariat the Admin committee ensured that there were regular and frequent web page updates about the conference as well as direct emails to participants to update them on “news” about the conference. The frequency of these updates and broadcasts to members increased as the date of the conference drew closer. This was aimed at creating a “buzz” about the conference. This included sending out emails to delegates regarding social activities (one month before the Conference and 2 weeks before the Conference), sending reminders for people to register and sign up for Thematic Breakfasts, bringing items for the CESEF Benefit Auction and so forth.

The Admin and Core Committee also communicated directly with the federal Heads of evaluation (through the Center of Excellence (CEE)) to encourage various federal departments to send their staff to the Conference. This included preparation of a handout for these Heads of Evaluation, a presentation at one of their regular monthly meetings, and some email announcements channelled via CEE.

3.4.2 Conference Program Document

In 2009, the Committee introduced various changes in the design of the Conference program including a pocket in the program itself, a harder cover, an alphabetical speaker index at the back of the document, a table of contents, and the inclusion of “day at a glance” – which was intended to make it easier for participants to navigate the Conference program document. **Future organizers might consider including a map of the Conference venue in the program.**

3.4.3 Volunteer recruitment and recognition

With the aid of two volunteer reps on the CES NCC Board, we reached out to the two universities in Ottawa for volunteers from their respective evaluation programs, who helped staff the registration desks and carry out other tasks.

CES Organizing, Core Committee and Board members were also recruited to assist in volunteering during the Conference. Volunteers who provided a minimum of 4 hours assistance were provided with free admission to the conference. Volunteers were recognized at various points during the conference – such as posting their names on large screens before plenary sessions.

To recognize and thank volunteers, the Admin Committee organized a small social get together a few weeks after the conference. Thank you emails were also distributed by Chairs of some sub committees to members. The Chapter plans to establish a volunteer “honour roll” on the CES NCC website.

3.4.4 Evaluation Surveys

For the first time in CES history, we piloted hand held tools during the conference to collect immediate feedback from participants on a limited number of multiple chose questions. This not only helped to green the conference, but provided very rapid analysis of results and feedback. This on-site survey was followed by an on-line survey a week following the conference. This latter survey was designed to “catch” those who had missed the first survey, and provided them the opportunity to add qualitative comments on the conference and collect evaluative information on the pre-conference workshops. Benoit Gauthier's volunteer time and expertise for the online survey was invaluable, and created considerable efficiency in the evaluation process. The overall response rate to the survey was very high-a total of over 400 individuals responded to one or the other survey. Finally, the use of these instruments enabled very quick tabulation of results.

BC based Techneos provided their software and equipment (valued at $8,000) as a contribution in return for some recognition at the conference and some post conference promotion on the CES Website (with CES National approval).

3.4.5 Miscellaneous

Other simple and inexpensive efforts taken in the 2009 Conference included:

- The use of tulip boutonnieres and bouquets to reinforce the "Ottawa" brand – we suggest that other Chapters consider similar ways of branding their provincial/regional conferences.
- Situating the registration desk in the middle of the common area provided a natural meeting point, and provided some cohesion for the conference.
- Using jester hats for those carrying out the surveys provided a sense of fun while helping identify the evaluators clearly.
- We considered, but decided against, spending resources on entertainment for the CESEF Auction, based on feedback from previous organizers and the Conference Secretariat who indicated that it was unnecessary-people come to that session to renew acquaintances and do not require additional (potentially distracting) entertainment such as a band.
- Tasking a couple of volunteers to assess the pros and cons of having a career booth at the Conference for employers and potential employees. Due to limited interest by potential federal government employers (the major employers in the region) and the local universities, a decision was made not to pursue this further. **Future organizers may want to examine the pros and cons of having a career booth at the Conference,** as the decision against one in 2009 was likely specific to the context of the National Capital Region.

4. Lessons Learned

4.1 Overall

4.1.1 Keynote speakers

One cannot start this process early enough. The Core Committee had many ideas, and the Conference Co Chairs started to look earnestly in September 2008. While we invited at least five high profile individuals between September and March 2009, none of these candidates accepted.. As is the norm, we pursued potential candidates in a sequential manner (rather than simultaneously) to avoid potential embarrassment if more than one individual accepted. This approach tends to prolong the process; future organizers may wish to rethink the pros and cons of this approach if one wants to secure a good speaker early. The committee did have a few backup options, including the use of a group of panellists to discuss a specific topic. This latter option was used as the committee was unsuccessful as recruiting additional quality speakers. We were told that finding quality speakers was a problem for most committees in the past.

The Core Committee considered the pros and cons of inviting well known individuals who were not evaluators as well as those who were prominent in the evaluation profession. It was very difficult to generate interest by and/or afford the former group. We subsequently learned that there are organizations which book well known speakers – an example is Speakers Spotlight found at http://www.speakers.ca/ , but it will likely be more expensive than other options.

However, despite the above challenges, the committee and most of the surveyed Conference participants were very satisfied with the leading keynote speaker (Patton), and this is reflected in the results of the survey shown earlier.

4.1.2 Volunteer Recruitment

Volunteers for Conference sub-committees were recruited as early as 2006. However, there were insufficient activities to occupy or engage volunteers in some Committees until the last year (e.g. Admin, Marketing and Sponsorship), which led to some attrition (there was considerable turnover in the Admin Committee between September 2008 and January 2009). **Future organizers may wish to stagger volunteer recruitment for committees, especially for the Admin committee as those volunteers are only needed six months in advance and you may lose their interest if you try to set the committee up too early.**

4.1.3 Paid Registration by Presenters

In the last few years, Conference organizers have had a number of difficulties with presenters who withdrew at the last minute when they learned that they needed to pay for their admission to the Conference. While we made every effort to make this clear in all our communications, many potential presenters indicated that they did not know this and could not afford to come to the conference, contributing to last minute changes to the program and other logistical difficulties[7].

[7] For the 2009 conference, there were at least 10 presenters who did this.

Future conference organizers should make it VERY clear to presenters that they MUST register for the Conference, even if they are only coming that day to present. Options for discouraging this practice may include a) a checkbox in the online submission form to indicate that that they understand the terms of submission, b) establishing a presenter "cut off" registration day – if they are not registered by a certain date, they will lose their opportunity to present – and/or c) establish a "Speaker Rate" for presenters (say a 10% discount).

4.2 Core Committee

4.2.1 Financial Monitoring and Management

In contracting with a venue, the hotel usually provides free (or for a very small charge) meeting rooms, if you guarantee a certain threshold of revenue for the hotel. The hotel profit comes from room nights and food and beverage revenues. When negotiating these contracts future organizers should ensure that CES commits to the overall revenues; do not get locked into room nights or food and beverage amounts separately. For Ottawa, we had overestimated the room nights, but later made this up through additional food purchases (thus the free lunch on the first day of the conference).

In regard to financial management, there was a tendency to rely on the Conference Secretariat's experience and assurance, rather than the Core Committee having an effective regular financial monitoring and control mechanism of its own in place. The absence and need for such a system became apparent four weeks before the conference when it was belatedly realized that the expected hotel revenues would not be met, with potential financial consequences for conference profits. While this was managed effectively in the end (we increased our hotel expenditures by providing a free lunch for participants and met the requirements of the contract), it could have ended differently (we could have paid an additional $20K unnecessarily to the hotel).

Future organizers are encouraged to establish clear expectations for the Core Committee, Treasurer and the Conference Secretariat in regard to financial budgeting and reporting for the conference. There should be regular reviews and updates of the budget and expenditures incurred to date with focused attention to budget variances. There should be regular financial reporting by the designated committee member at Core Committee meetings for the last six months of conference (at least), accompanied by timely recommendations to facilitate Core Committee decision making (such as setting registration fees, reducing or increasing expenditures to meet the hotel contract requirements, and so forth).

The Conference budget was prepared well in advance (2006). The Core Committee revisited the budget in December 2008 and discovered that several costs were missing. The budget was subsequently updated (approximately 5 months before the date of the Conference) to correct these omissions and to reflect the fees that would be charged for the conference, workshops and so on. **Future organizers are encouraged to initiate this process a little earlier but it is important to revisit these issues as you set your fee structure for the conference**

4.2.2 Managing the Use of Secretariat's Services

The Core Committee and sub committees received excellent support from the Conference Secretariat throughout all stages of the Conference **-** from planning to delivery. There is no doubt that the corporate knowledge, endless energy and good humor exhibited by both regardless of the challenge went a very long way in making the conference as successful as it was. This was reflected in feedback by Committee organizers as well as survey responses some of whom went out of their way to mention and thank specific employees of the Secretariat for their support.

CES NCC had negotiated a fixed fee with the Secretariat for its general support services (e.g. Committee support, monitoring the critical path and budget). As a consequence, the Secretariat did not report on the utilization of these services to the Committee organizers (nor was it required to, as the contract was of the fixed fee variety. After the Conference was over, the Secretariat informed the Organizers that actual time utilized for such general support was 250% greater than originally planned, and requested that the Committee consider some compensation. The difficulty faced by the Committee in considering this request was that it had not received any prior warnings about this possibility, and so never had the opportunity to take corrective actions ((e.g. in this instance, reducing reliance by the Core Committee or other Committees)**.**

In the future, Conference organizers need to ensure that there is an adequate reporting system in place whereby they will be informed in a timely way by the Secretariat of potential cost-overruns so that corrective measures can be taken.

4.3 Program Committee

A number of lessons were learned about the program development and management process.

- Despite the fact that the call for proposals was detailed and clear in terms of requirements, future organizers should assume that many individuals submitting papers will miss, ignore or forget these requirements. **In retrospect, at least one requirement in the Call should have been altered: it was specified that the description of the presentations (abstract) should not exceed 150 words for an oral presentation or poster, and up to 300 words for a demonstration, expert lecture, debate, panel, think tank, round table or skill building workshop). This was too lengthy and led to a very time-consuming editing process. On the other hand, fewer words may make it difficult for the committee to select proposals, especially if there is more focus on quality.**

- **The use of an excel database made it much easier for the committee to manage the selection and program management process.**

- The session chairs should be identified well in advance. The time required to select (and obtain positive responses) was underestimated by the committee. More chairs should also have been selected to share the load. Asking one of the presenters to chair the session is an option that could have been used. A Guide for Session Chairs was distributed to help the chairs fulfill their responsibilities. Some chairs did not show up. Unfortunately, the volunteers did not inform the organizers, and as a result, a small minority of sessions occurred without a session chair. **In the future, we recommend that the Chair recruitment process begin at least one month before the Conference, and that the orientation provided to the volunteers clarify their responsibilities.**

- A decision was made to require each presenter to pay to attend the conference. This was the object of some debate. The committee decided not to pay presenters or give them free admission (as in previous conferences), as there were about 100 presenters and it would have had a significant financial impact. Many presenters resented the fact that they needed to pay, even though it was clearly indicated in the call for proposals, and despite all the side benefits associated with the conference.

- Approximately five percent of the presenters cancelled for various reasons later in the process. The committee debated whether a waiting list could have been used to fill some of the voids left by these cancellations.

- The pre-conference workshops received mixed reviews. Many survey respondents mentioned that they were not useful or too theoretical. Some wondered why they occurred on a Sunday.

- **In retrospect, the Program committee could have undertaken a better needs assessment for the pre-conference workshops and could have been more pro-active in identifying potential workshop presenters. To attract higher quality presenters, the committee could also have offered a more significant compensation.**

- Open-ended responses to the survey indicated that many participants felt that the concurrent sessions were of uneven quality. Having fewer presentations per session (many suggested three per session) of higher quality were proposed by a number of respondents. Many also would have liked more Q&A time (for both the plenary and the concurrent sessions).

4.4 Administration Committee

4.4.1 Financial Incentives for Early Bird registration for Conference and Social Events

The financial incentives for early registrations for the conference proved to be very effective in getting individuals to register early (so effective, it reduced our expected revenues from this source). **Future organizers are encouraged to provide financial incentives for early bird registrations for all conference events-including dinners, entertainment etc – this provides organizers with information needed to inform last minute decision making about attendance (e.g. increasing, reducing numbers for meals and breaks) and reduces potential wastage (e.g. unsold tickets for the dinner event) and reduces financial risks.**

4.4.2 CESEF Benefit Auction

Future organizers are encouraged to be careful in estimating how many will attend the session. In 2009, many Ottawa residents (who formed the bulk of attendees) did not attend. On hindsight, a smaller venue for opening night reception is better, if you suspect attendance may be limited. In 2009, close cooperation between the Core Committee and those managing the CESEF auction generated considerable revenues for the Benefit Auction.

4.4.3 Hospitality Suites

While the Hospitality Suites can generate revenues for the Conference and the hotel where the Conference is held, the model has several weaknesses. Noted complaints include the timing of the event (too late at night for some participants, the costs of hosting to the sponsor when obliged to pay hotel costs for food and beverages, and the tendency to have “competing” suites rather than a consolidated one. It should be noted that there was limited revenue generated through such suites in 2009. **Future organizers may wish to survey those firms that have (and have not) used these suites in recent years to see what suggestions they might have for improvement.**

4.4.4 Evaluation survey

Based on the 2009 experience, we would suggest that organizers include fewer detailed evaluation questions on social activities and include more questions on different types of conference presentations (separate questions for posters, papers and panels). While the dual mode (in-person and email) survey increased the response rates, the results indicated that there is a bias associated with each method (respondents of the in-person survey tended to be more satisfied). This is a well-known survey phenomenon. Organizers should also not forget to conduct separate evaluations of the workshops (for the trainers' benefit).

4.4.5 Meals on site

While the decision to offer all lunches on site was a financial one (see section 4.2), there was a very positive response to having the lunch provided on the Monday (day 1) as well as the traditional awards luncheon. This decision helped reduce attrition and latecomers to sessions.

4.4.6 Exhibitors - Publications and Books

Future organizers are encouraged to invest more attention to attracting exhibitors, especially publishing companies (people wanted to see books!). If they are unwilling to come, perhaps the local university can sponsor or manage the purchase and sale of books on behalf of the publishers.

4.4.7 Delegate program and bag

As indicated in the survey results shown below, equal interest was expressed in obtaining a biodegradable bag or bringing their own conference bag. Based on the 2009 experience, **we suggest that future organizers communicate in advance with delegates to let them know if there will be no delegate bags so they can bring their own.**

A minority of those surveyed would eliminate the paper program and replace it with an electronic one.

Exhibit 3.3: Interest in Program Documentation Formats

	Very disinterested	Disinterested	Interested	Very interested	Total interested
Electronic evaluations (no paper and pencil evaluations)	1.4	3.4	29.2	66.1	95.3
Biodegradable cloth delegate bags	12.6	14.8	34.1	38.3	72.4
Elimination of delegate bags (i.e delegates bring their own)	9.9	18.6	29.3	42.2	71.5
Electronic conference programs only (no paper copy distributed)	32.8	31.6	19	16.6	35.6

Source: Survey of Conference Participants n=403

4.4.8 Other

Other lessons learned of potential interest to future organizers include the following:

- **Make registration rate information very clear; there were numerous last minute requests by NGOs for favourable rates. If the Core Committee wants to reduce rates for this type of participant, this should be communicated clearly.**

- **Meet the student volunteers ahead of time (organise a meeting with the Secretariat and the students) and be privy to the volunteer schedule (to manage risks and if need be, recruit additional volunteers at the last minute – use your evaluation network to find last minute help whereas the Secretariat does not).**

- **Develop a volunteer kit with a description of all the various tasks volunteers might be called to take on and a precise protocol for registering volunteers so that every member of the core committee can actively recruit and appropriately direct potential volunteers throughout the preparation year.**

- **Set time aside to tailor the conference orientation session for new attendees: a standard orientation exists but requires tailoring and more details.**

5. Recommendations for CES National

1. **CES National should consider standardizing a limited number of questions that are used in conference surveys each year so that year-to-year comparisons can be made.**

2. **CES National should consider adding new items to the Conference manual, including tips and best practices to support an environmental-friendly conference.**

3. **CES National should strongly encourage Conference organizers (including the Co-Chairs!) to read and improve the Annual Conference manual as required.**

4. **CES National should develop a policy related to rates charged for representatives of other evaluation societies – some such individuals could not attend at last minute due to lack of sponsorship and contributed to some cancelled sessions or speakers. The local chapter should not be placed in the uncomfortable position of making a decision about registration fee waivers for evaluation societies.**

5. **To ensure there is excitement (buzz) about future Conferences, CES National should consider institutionalizing the position of Communications "point person" within one of the Conference Committees (e.g. Admin Committee) who would be charged with coordinating and ensuring consistency and momentum in all external communications. This could include communications about the program content, social activities, registrations, the CESEF auction and so forth throughout the six months prior to the date of the Conference,**

6. **CES National should consider asking former Conference Co-Chairs to animate a consultative process regarding the desired characteristics of future Annual Conferences. This could include issues such as the objectives (professional development, networking, mentoring), duration (2 days or more), benefits of paid and unpaid workshop presenters, the number of sessions, the diversity of Conference formats, and so forth. The 2009 Conference Co-Chairs would be pleased to launch such a process if requested to do so by National CES.**

* * *

Appendix A: Call for Papers and Workshops

Canadian Evaluation Society 2009 National Conference
Call for Presentations and Professional Development Workshops

Evaluation professionals and other potential presenters are invited to submit proposal(s) for a Presentation and/or a Professional Development Workshop for the Canadian Evaluation Society 2009 National Conference. The theme for this year's conference is Value in Evaluation. Information about the conference can be found at (hyperlink).

Conference Themes

Presentations and Professional Development Workshops should address one of the following conference themes.

A. Evaluation Value for Government

Evaluation is a key function that can bring value to all levels of government in Canada. This theme focuses on the value, roles, and challenges of evaluation in a government context. The following sub-themes are proposed:
A.1 Enhanced results achievement
A.2 Improved accountability reporting
A.3 Evaluation and policy
A.4 Performance measurement
A.5 Learning and organizational change through evaluation

B. Evaluation Value for the Larger Society

Evaluation also benefits other organizations, including associations, non-profit organizations, charities and private sector organizations. These organizations use a variety of monitoring and evaluation strategies that are adapted to their objectives, partnering arrangements and environments. The following topics are proposed for this theme:

B.1 Managing within increasingly complex policy and program environments
B.2 Evaluation in the Not-For-Profit sector
B.3 Evaluation in the For-Profit sector
B.4 Learning and organizational change through evaluation

C. Evaluation Value on the International Stage

This theme focuses on the value of evaluation in an international setting. As in Canada, more and more governments and organizations abroad rely on evaluation to enhance programs and demonstrate results. The following sub-themes are proposed:

C.1 Multiple country evaluation
C.2 Evaluation practice in different countries
C.3 Evaluation of international development programs
C.4 Learning and organizational change through evaluation

D. Ensuring Value through a Stronger Profession

Evaluation value is partly ensured by a strong community of evaluators. While evaluation is well established in Canada, the evaluation community faces a number of challenges, including competency recognition and membership renewal. Two sub-themes are proposed.

D.1 Professional development
D.2 Strengthening the evaluation community

Guidelines for Presentations are the following. (Guidelines for Professional Development Workshops are presented later in the text.)

Presentations

Presentations will be made during the conference. They may be in the form of papers, posters, panels, etc. See annex for list and definitions. Each session is expected to have the following time allotment (including discussion):

Paper Session:	20 or 30 minutes
Panel:	45 or 90 minutes
Demonstration:	45 or 90 minutes
Expert Lecture :	45 minutes
Debate:	90 minutes
Think Tank:	45 or 90 minutes
Roundtable:	45 minutes
Skill Building Workshop:	45 or 90 minutes
Poster:	Standing displays at designated locations

Presentation Selection Criteria

Presentations will be selected according to the following criteria:

- Consistency with conference themes;

- Experience and knowledge of presenter(s);
- Relevance and potential usefulness of presentations for delegates; and
- Number of presentations per presenter.

Special consideration will also be given to presenters who propose joint presentations with less experienced presenters. Not all proposals will be necessarily accepted.

Guidelines for Submitting Presentation Proposals

Presentation proposals must include the following:

- Title of the presentation.
- Type of presentation (paper, poster, debate, etc. See annex for definitions). Please indicate whether you would be willing to accept an alternate presentation format.
- Names and affiliations of all presenters (or discussants for symposiums and panels). Underline the name of the presenting author (or of the organizer in the case of a symposium or panel).
- Presenter's or organizer's complete mailing address, phone and fax numbers, and email address.
- Abstract (up to 150 words for an oral presentation or poster, and up to 300 words for a demonstration, expert lecture, debate, panel, think tank, roundtable or skill building workshop).
- Biography of presenters (up to 300 words).
- Conference theme addressed by your presentation (indicate one theme only).
- Language of presentation.

Please note that a data projector, computer and screen will be provided. All other equipment must be ordered in advance and paid for by presenters. Presentation and poster guidelines will be provided with notification of acceptance. Also note that, considering the benefits of attending the conference, all presenters will be required to pay the conference entry fees.

Please submit your proposal by email to:

Sue Ryan
Email: susan.ryan@thewillowgroup.com

For information: Tel: 613-725-2526

DEADLINE FOR RECEIPT OF PROPOSALS IS DECEMBER 5th, 2008.

Professional Development Workshops

Professional Development Workshops are hands-on, interactive sessions that provide an opportunity to learn new skills or hone existing ones. The workshops precede the conference, may be either half or full-day workshops, and thus provide a more in-depth exploration of a skill or area of knowledge. Workshops will be delivered in the language of submission. Presenters are expected to have significant experience both presenting and in the subject area. Please note that a data projector, computer and screen will be provided. All other equipment must be ordered in advance and paid for by presenters.

Presenters will not be paid for their contribution but will be exempted from the Conference attendance fees.

Workshop Selection Criteria

Presentations will be selected according to 1) the level of experience and knowledge of presenter(s); and 2) the relevance and potential usefulness of the workshop content. Please note that there is usually high demand for intermediate and advanced level workshops.

Workshop proposals must include the following:

- Title of the Workshop.
- Level (beginner, intermediate, advanced).
- Learning objectives and workshop approach (including participant interaction).
- Targeted attendees, including pre-requisites (if any).
- Names and affiliations of all presenters.
- Presenters' complete mailing address, phone and fax numbers, and email address.
- Biography of presenters (up to 300 words).

Not all proposals will be necessarily accepted.

Please submit your proposal by email to:

Sue Ryan
Email: susan.ryan@thewillowgroup.com

For information:Tel: 613-725-2526

DEADLINE FOR RECEIPT OF PROPOSALS IS DECEMBER 5th, 2008.

Definitions of Presentations

PAPER: These presentations focus on a specific topic or issue and are expected to last between 20 and 30 minutes, including time for discussion. Presenters should plan for a 5 to 10 minute question period for their own presentation. Two or three presentations are grouped in facilitated sessions that will last approximately 60 minutes. A Chair will present each presenter and will facilitate a question and answer period at the end of the session. The Chair will also be responsible for ensuring that each presenter respects the agreed upon timelines. Papers submitted individually will be grouped with others on a common theme.

Paper presenters usually use a slide-show presentation to illustrate their key points. An overhead and screen are provided in each room in which paper presentations are held. Most presenters will offer an email address through which an attendee may obtain an electronic copy of the full paper. Presenters can offer an environment-friendly paper synopsis for distribution after the session to those who express a serious interest in the presentation (between 5 and 10 copies, printed on both sides, bilingual if possible).

DEBATE: Time slots will also be allocated for debated discussions. Two or three debaters should hold clearly differing points of view as they exchange insights on a topic of import to evaluators. The interaction should be moderated by a chairperson with a prepared set of questions. Half of the presentation time should be devoted to response to audience questions. The main abstract should identify the topic, why the topic is of interest to evaluators, and the contrasting positions of the debaters. Some debates will include visual aids, usually in the form of overhead transparencies and an overhead and screen are provided in each room in which a debate is held. An alternative format would be to debate a specific proposition that would be directed towards a specific organization or institution, such as the CES.

DEMONSTRATION: Demonstrations are formal 45- or 90-minute classroom-style presentations that provide an intellectual awareness and understanding of a useful evaluation concept or tool. These may be contrasted with Skill Building Workshops that provide a hands-on experience. The abstract should describe how the presenter will walk attendees through a clear, step-by-step explanation of the concept or tool, how it compares to other evaluation concepts or tools, its strengths and weaknesses, and how it can best be applied.

EXPERT LECTURE: Expert Lectures are formal 45-minute presentations by an acknowledged expert in the field who will share conceptual or methodological innovations through a lecture followed by response to audience questions. The abstract should detail both the background of the lecturer as well as the importance of the material to be presented. Please note that an expert lecture, at 45-minutes in length, is about three times the length of a standard paper presentation.

As such, the breadth and depth of the content, and the expertise of the presenter, should warrant such an extended exploration.

PANEL: This formal, thematic, 45- or 90-minute presentation focuses on an issue facing the field of evaluation. The overall abstract should describe how two (for a 45-minute panel), or more (for a 90-minute panel), panellists and possibly a discussant will offer coordinated presentations and the general topic of the panel. In addition, the proposal must contain separate abstracts or summaries from each presenter describing his or her contribution to the session. At a minimum, the information in the 'abstract' section for each panellist should indicate the expertise or perspective that he or she brings to the panel (why is this person a panellist rather than someone else). The submitter is responsible for coordinating the presentations in advance. Panels should be interactive in that they allow for questions and discussion following the formal presentations.

POSTER: Delegates may present Posters on a specific topic. Posters are presented, during the designated hours, on white tri-fold presentation boards set on tables throughout the Poster Room. Poster presenters stand beside their posters and discuss their work one-on-one or in small groups with attendees. This formal graphic presentation of a topic, displayed on poster board, offers an excellent opportunity for gathering detailed feedback on the author's work and reporting on evaluation results. Posters should NOT be used to advertise a product or service. Like a paper, a poster abstract should detail the focus of the presentation and the way(s) in which it contributes to the body of knowledge in the field of evaluation. Many poster presenters supplement their posters with a handout that summarizes their work and provides contact information for further follow-up. CES would provide the backing boards and pins for posters while presenters provide all items to be attached to the boards.

ROUNDTABLE: Roundtables are 60-minute oral presentations with discussion seated around a table. They will be held in parallel with the time designated for breakfast and participants will often bring some breakfast to the table. Roundtable presentations typically include several minutes of presentation by the organizer, followed by discussion and feedback. Roundtable presenters should bring targeted questions to pose to others at the table in order to learn from and with those attending. An alternative format would be to debate a specific proposition that would be directed towards a specific organization or institution, such as the CES. Roundtables do not have traditional audio-visual aids available, but most roundtable presenters bring handouts. Roundtables are excellent venues for getting targeted feedback, engaging in in-depth discussions, and meeting colleagues with similar interests. They are not an appropriate format for presenters that anticipate more than 15 people in attendance. Roundtables are an ideal format for networking and in-depth discussion on a particular topic. The abstract should detail the focus of the presentation and the way(s) in which it contributes to the body of knowledge in the field of evaluation. Each presenter is in charge of his or her discussion group, but most will include an introductory discussion component with ample time for questions.

SKILL-BUILDING WORKSHOP: As part of a 45- or 90-minute session taking place during the conference, workshops teach a specific skill needed by many evaluators and include one or more exercises that let attendees practice using this skill. The abstract should include a detailed discussion of why this skill is important, how the presenter will teach the skill within a short time frame, and how the presenter will enable attendees to learn more after the session. This session differs from a Demonstration in that attendees will have a hands-on opportunity to practice the skill. Attendees should be ready to get involved as these sessions are not passive, but rather active opportunities for learning. Most workshops include take-home materials for use and reference post-conference. This session differs from a Professional Development Workshop in that it takes place during the conference, is significantly shorter in length, and thus does not allow for as much breadth or depth in exploring the topic, and may be presented by someone with less facilitation experience than that expected for the pre- and post-conference workshops.

THINK TANK: A think tank is a 45- or 90-minute session focusing on a single issue or question. Initially, a chairperson orients attendees to the issue or question and relevant context. An alternative format would be to debate a specific proposition that would be directed towards a specific organization or institution, such as the CES. Then, attendees break into small groups to explore the issue or question and finally reconvene to share their enhanced understanding through a discussion facilitated by the chairperson. If the overall group is small, the central discussion may take place among the group as a whole. As the session winds down, the group reconvenes or refocuses with an eye toward identifying what has been learned or next steps in an action-based process. Some think tanks incorporate overhead transparencies to illustrate key points or raise specific questions. The abstract (submission) should succinctly identify the question or issue to be addressed, the relevant contextual factors, and the roles of the individual breakout groups.

Appendix B: Lessons from Electronic Survey[8]

- Make sure that the questions align with what is happening at the conference (i.e. we asked about the delegate kit but really we didn't have one.)

- Make sure that questions flow well (i.e. we ask about wanting to eliminate bags and then ask about biodegradable bags.) Also, the feedback indicated that we should havefirst asked if people were interested in greening the conference. If they were interested we could have then asked a question on it as it was felt that there were too many questions on greening the conference (i.e. Are you interested in having biodegradable bags or no bags at all? Are you interested in having an electronic itinerary or a paper itinerary etc....?)

- It was felt that we had too many questions on specific social events. We should have had one general question and/or have an intro question asking people first if they attended the social events. If they answered yes then we could have asked a more general question. If they answered no we would then have moved on to the next question.

- Ensure that respondents have an opportunity to provide qualitative comments - we did address this one already.

- Once a person is done answering the survey, the interviewer should give this person a sticker to put on his/her nametag. This way, other interviewers would know who has and who has not yet participated in the survey

- The use of the jester hats to identify those conducting surveys was playful and effective.

Judy Lifshitz
June 2009

[8] The questions used in the 2009 surveys are available form the Willow Group

Appendix C: Greening the CES Conference

The CES 2009 Green Team was an ad hoc group comprised of Jennifer Birch-Jones and Courtney Amo which reported to two Board members. The impetus for the Green Team came from the members themselves which, when presented to the Board, was seen to be an important element to add to the organizing committee's roles and responsibilities.

The Green Team met in October 2008 to discuss options for supporting the CES 2009 Conference organizing committee in incorporating environmentally responsible practices into its planning work and decision-making. The overall aim of the Green Team's efforts was to help minimize the environmental impact of the 2009 CES Conference and in the process, to set a high standard for subsequent CES events.

In order to provide the conference organizing committee with concrete suggestions, a Greening the CES Conference checklist (see Appendix) was developed and sent to the organizing committee. Although the Green Team had agreed to present this checklist at an organizing committee meeting and discuss options in more detail, the Green Team was not called upon for that purpose.

A number of actions were, however, taken by the organizing committee in order to green the CES conference. To give a few green highlights: participants were encouraged to register online and to keep the amount of paper they brought to the conference to a minimum. They were also encouraged to bring their own travel mugs and bottles, to consider the most environmentally friendly way to travel, and to consider purchasing carbon offsets, to name a few.

The organizing committee also worked with the hotel to ensure the availability of water stations to reduce the number of plastic water bottles used at the conference. Delegate bags were eliminated completely, and replaced with an optional recyclable folder. The conference program was printed on recycled paper, and name badges were collected at the end of the conference for recycling. The organizing committee also worked with the hotel regarding the serving of food and beverages, availability of recycle bins, turning off of lights in rooms not in use, and other ways in which they could help given their own commitment to green events.

In addition, a green page was set up on the official conference website and some key greening information was posted there. This greening information was also sent periodically to all CES members as part of the regular CES e-newscasts. Clicking on the green teaser in the e-newsletter brought them to the green page of the website whereby they could read all of the relevant text. The dates and topic areas for the "green casts" were as follows:

- October 29, 2008: Greening CES Conference 2009 – What Can Be Done
- October 31, 2008: One Million Acts of Green
- January 21, 2009: About Carbon Offsets
- March 8, 2009: Minimize the Environmental Footprint of your Travel to CES 2009
- April 22, 2009: Celebrate Earth Day with the CES Conference 2009 Green Team
- May 26, 2009: Help us Green this year's CES Conference

The generation of the green content for the emails and website was made more challenging by the lack of French equivalent website (outside of the Cdn federal government’s websites). Although the articles were not that long, and every effort was made to use bilingual websites, some translation was necessary for each green email. Fortunately, we had a bilingual member of the Green Team so we did not have to tap into the organizing committee’s translation budget.

The evaluation of the conference was done electronically, as has also been the case in past CES conferences. Unfortunately, there was not an opportunity to insert any greening questions before the evaluation was administered. As a result, the impact of the greening initiatives could not be determined.

Although the green actions taken this year represent important first steps for greening CES events, there is substantially more that could and should be done to minimize the carbon imprint of the CES, including future conferences. There is certainly a growing body of knowledge that can be tapped into in order to assist with the ongoing greening of the CES, whether it be how to hold green meetings or help with calculating the carbon footprint of a CES event or initiative. There are also green event planners who can assist with this aspect of the conference.

In order to support CES future efforts in this respect, the Green Team would recommend the following:

1. *Resources:* Although the working group model that was applied in this case represented a good starting point, the Green Team worked at a distance from the organizing committee and was therefore not able to provide regular and targeted input throughout the conference planning and decision-making process. It is recommended that, for the 2010 CES conference and subsequent conferences, that a position on the conference organizing committee be given the specific responsibility of coordinating conference greening efforts. This could include coordination of volunteers such as a Green Team, but also developing a green policy, considering the green implications of all decisions taken, seeking out green sponsors, etc.. This will ensure regular, targeted, and ongoing support to the organizing committee’s greening efforts.

2. *Policy:* The CES does not appear to have an overarching green policy covering its operations and its events. It is recommended that the CES develop and issue such a policy to ensure that greening efforts be undertaken in a coordinated and cost-effective manner for all of its events.

3. *Monitoring and Evaluation:* It is recommended that a standard set of questions be developed and included in the evaluation of future CES events in order to monitor the implementation and impacts of CES' efforts towards reducing its environmental impact.

Prepared by the CES 2009 Green Team (Courtney Amo and Jennifer Birch-Jones)
July 2009