

anzea 2012 Pre-Conference Workshops

Schedule

Sunday 8th July 2:30-5:30pm	
Presenter	Title of Workshop
<i>Aly McNicoll</i>	The Mentor's Toolbox – Developing effective mentoring skills and relationships for evaluation practitioners
<i>Kara Scally-Irvine and Jocelyn Brace</i>	Evaluating for results: A practical approach linking planning, monitoring and evaluation
<i>Thereza Penna Firme</i>	Employing evaluation as a tool for strengthening democracy
<i>Carol Mutch</i>	Integrating quantitative and qualitative data: how, when, where, why?
Monday 9th July 9:00-12:00pm	
<i>Angus MacFarlane</i>	Culturally Responsive Evaluation
<i>Jane Davidson</i>	Evaluation Rubrics 101
<i>Samantha Lundon</i>	Stepping stones to effective evaluation with Māori providers: Building whanaungatanga, shared understanding and trust
<i>Pam Oliver</i> <i>FREE</i>	What is evaluation? An introduction to evaluation purposes, design and methods
<i>Yoland Wadsworth</i>	Exploring the implications for practice of a living systems evaluative inquiry approach

Dr. Jane Davidson is internationally recognised for her cutting-edge work applying critical thinking and evaluative reasoning to create practical solutions, tools and methodologies that work for practitioners in the real world seeking to achieve – and document – real results. She is author of *Evaluation Methodology Basics: The Nuts and Bolts of Sound Evaluation* (2004, Sage Publications), which has sold heavily in the U.S. and is used as a graduate text and practitioners' guidebook. Jane brings a distinctively Kiwi, multidisciplinary and refreshingly practical, plain language approach to evaluation across a range of areas including education, health, social policy, leadership development, and many other areas. Her work includes infusing outcome-focused evaluative thinking into policy and programming; developing practical tools and methodologies to support and evidence results-focused change; evaluation capacity building; supporting inquiry and self-review; and independent evaluation.

Evaluation Rubrics 101

Do you ever get frustrated with people who think all you need to do is pick a few indicators, track them, and that's about all there is to evaluation? The same ones who think all qualitative and mixed method work is fluffy and unreliable? And at the same time ... how often do we see evaluation reports that leave the reader wondering how worthwhile the outcomes really were? At one level, we can understand evaluation purchasers needing direct answers to their questions and trackable progress they can see. But how can we deliver on that without massively oversimplifying the richness we see in programme design, implementation and outcomes?

This workshop is designed for both evaluation providers and purchasers. It will provide you with a useful mixed-method evaluative tool – rubrics – that can help you ask the right questions and generate clear, direct answers that are well-reasoned and well-evidenced, simple but not simplistic.

Thereza Penna Firme is a Cesgranrio Foundation Senior Evaluation Consultant Professor (retired) in education and evaluation at the Federal University of Rio de Janeiro. Thereza is a co-founder and President of the Brazilian Evaluation Network, established in 2002. She has been the Coordinator of the Stanford University Evaluation Center extension in Rio de Janeiro, working with David Fetterman in the field of empowerment evaluation in childhood education and with socially disadvantage groups. She has published widely on the area of evaluation as a tool for democracy

Employing evaluation as a tool for strengthening democracy

Democratic societies often face challenges to innovative problem-solving in the face of cultural and ideological diversity. Respect for diverse values becomes key to developing social, health and educational programmes that are relevant to diverse cultures and sub-cultures within a society, and evaluation becomes an instrument par excellence for generating information that reflects stakeholder values as one basis for relevant programme development. The challenge for evaluators is to reveal the important values from the context, some visible, others more subtle. Varying levels of conflict can result in the process of looking for consensus amidst plurality of values. Innovative programmes for societal improvement are all unique, and linking broad social values with values unique to each programme's context is key to evaluation being accepted and used. However, a lack of understanding of the value and potential uses of evaluation can impede organisations from accepting evaluation and incorporating it into their delivery of innovative programmes. Building evaluation capacity in provider organisations that will enable them to better monitor their effectiveness is therefore crucial and to do so in a way that will ultimately institutionalise evaluation practice and install an organisational culture is a challenge for the evaluation profession. In this workshop, Thereza will examine some of the challenges to building evaluation approaches in that respect and encourage cultural diversity, and explore some pathways to achieving that goal, using examples from her own work in the education and social service sectors

Samantha Lundon (Tainui, Ngati Te Ata, Ngati Makirangi) is the kaihautu of Ideal Success Charitable Trust, a Māori provider in Manurewa. She served on the Board of the New Zealand Qualifications Authority (NZQA) and was integrally involved in its move from an audit to an evaluation system. Ideal Success Charitable Trust has been delivering services to Māori in the Manukau region for many years, working in particular with socially disadvantaged whānau. Ideal Success recently received funding from ASB Trust to deliver an innovative programme (Nga Huarahi Tika) in Manurewa and as part of that, their team is trialling a very innovative self-evaluation framework which involves building evaluation capacity through self-reflection with the client group, as well as a 360 degree model for clients and providers to evaluate reciprocally.

**Stepping stones to effective evaluation with Māori providers:
Building whanaungatanga, shared understanding and trust**

The prospect of an evaluation can be intimidating and scary for programme providers who have little or no experience of being evaluated, or have had negative experiences of audits or evaluations previously. Evaluation may be seen by providers as an outsider making judgments on a programme concept that they have had little direct experience with, or there may be fears of losing intellectual property, that evaluation may take staff time away from providing the programme, or the provider may be apprehensive about their ability to meet the expectations of funders and evaluators. And anxiety can influence the ways that providers react to evaluators and evaluation. For kaupapa Maori providers, there are particular sources of apprehension around the cultural or intellectual property of their service concepts. These issues will be illustrated by examples drawn from Samantha’s experiences working with a spectrum of people, from Black Power wives to government Ministers, and in a range of roles including advocate, educator, programme developer, manager and at governance level Samantha will share her frank reflections on the issues for service providers when evaluation is a contractual requirement.

Samantha’s kōrero will also provide tips and advice on what’s needed from evaluation practitioners and evaluands, for both kaupapa Māori and other NGO service providers, in order to build the honest communications and shared understandings that form a relationship of trust. Sam will demonstrate how the establishment of trust can increase the validity of the evaluation, and will produce benefits and learning for everyone involved, including the evaluators.

Through discussion and a range of small group and plenary activities, you will have the opportunity to gain some insights and skills for the next time you are undertaking an evaluation with a community-based initiative.

Angus Hikairo Macfarlane (Te Arawa) is an experienced Māori researcher and evaluator and Professor in Māori Research at the University of Canterbury. The thrust of his activities is the exploration of cultural concepts and strategies that affect positively on professional evaluation practice. He has presented papers on culturally responsive educational approaches for improving motivation and learning throughout the world. He has authored five books and over 200 academic articles. In December 2010 Dr Macfarlane was presented with the Tohu Pae Tawhiti Award, acknowledging his significant contribution to Maori research over an extended period of time. His most recent book, *Responsive Pedagogy*, was launched in October 2011.

Culturally responsive evaluation

Today the contexts in which programmes and services are required to be evaluated are marked by a myriad of forces. Each individual evaluation practitioner is marked by complex histories that include family, physical, social and emotional experiences that orient the individual in life-world situations – sometimes positively and sometimes negatively. While evaluation practitioners (who often reside in the systems-world) cannot expect to understand the full complexity of these forces, we can come to better understand and draw validity through some of the elementary dynamics of the cultural world (Rose Pere, 1997) that affect people’s wellbeing and development. To make any claim about the validity of an evaluation, we need to know more about the cultural conceptions of evaluation held by practitioners. While conventional evaluation strategies may be valuable, many appear to be developed in a socio-cultural vacuum. Constantly we ask ourselves, “As evaluators, what can we do that might *culturally* build on the existing sound approaches that are present across the broad spectrum of evaluation practice?” This workshop will introduce an evaluation tool (Te Pikinga ki Runga) that applies a more contextualised approach to evaluation - culturally authentic evaluation - an approach that centres on relevance and connectedness.

Pere, R. R. (1997). *Te Wheke: A Celebration of infinite wisdom*. (Reprint) National Library of New Zealand, Wellington

Aly McNicoll has been involved with training professionals in coaching and mentoring in New Zealand and Australia for the last 12 years. She has successfully provided people with mentoring tools and skills in a wide range of organisations and professions in the business and not-for-profit sectors

She is a director of The New Zealand Coaching & Mentoring Centre (NZCMC), which is a recognised leader in professional mentoring services. They work with organisations who want to be more strategic in how they use mentoring and coaching to enhance leadership and learning. Aly is a regular presenter at national and international conferences (American Society for Training & Development Conference, European Mentoring & Coaching Council Conference). Prior to her corporate training role, Aly has led leadership and management programmes at Unitec Institute of Technology where she also spent four years training tutors in the staff development unit. She is also a qualified counsellor.

The Mentor's Toolbox – Developing effective mentoring skills and relationships for evaluation practitioners

More and more professions are recognising the significant contribution that mentoring can make to working effectively in one's profession, strengthening professional practice and growing the next generation of practitioners. By its very nature evaluation is a demanding profession, involving multiple stakeholders with diverse goals and agendas, and mentoring can play an important role in keeping practitioners safe. Mentoring relationships need to ensure they offer high value for time invested by those who participate.

This workshop is highly practical and there are opportunities for building skills through a series of practical exercises designed to give participants a taste of effective mentoring. It will enable evaluation practitioners to build significant mentoring relationships and improve their confidence and competence in the role. Participants will learn how to:

- Identify the mentoring needs and issues of the evaluation community
- Avoid the most common pitfalls in mentoring
- Use a 4 step model for effective mentoring conversations
- Questions not answers – mastering the art of mentoring questions
- Listen for the heart of the matter
- Begin a mentoring relationship that results in good mentoring practice.

Dr Carol Mutch is Associate Professor in Critical Studies in Education at the University of Auckland teaching education policy, research & evaluation. Prior to this she was Senior Advisor to the Chief Review Officer in the Education Review Office, with responsibility for re-shaping evaluation approaches used by ERO and by schools in preparation for ERO visits. Her evaluation work has included conceptualising how best to integrate internal and external evaluation, writing about mixed methodology approaches and conducting practical workshops on school self-review.

Integrating quantitative and qualitative data: how, when, where, why?

Many researchers and evaluators collect both quantitative and qualitative data but then find themselves in a dilemma when they come to draw the findings together. This workshop will outline three scenarios: (a) planning a mixed method project from beginning to end; (b) finding the need to expand the data collection as the project goes along; and (c) arriving at the end with discrete data sets that need integration. The workshop will provide some theoretical background and a useful reading list, but the main focus will be on the practical application of different approaches. Participants will gain an understanding of the strengths and limitations of mixed method approaches and how to use these to suit their needs. Participants will also be encouraged to share their own experiences of what worked well or not for them.

Useful reference: Mutch, C. (2009). Mixed method research: Methodological eclecticism or muddled thinking? *Journal of Educational Leadership, Policy and Practice* 24 (2) 18-30.

Dr Pam Oliver has extensive experience in social and evaluation research, and in tertiary education, extending over the past 25 years. Pam had a substantial background in frontline social services delivery, working in various social and mental health services positions in Australia and New Zealand from 1975-1987. Since 1997 she has worked as an independent evaluator and researcher, and has undertaken more than 100 major evaluation and research projects, working as part of a multi-cultural team. Many of their projects have been undertaken with Māori communities. Pam specialises in developing customised methodologies for particular cultures, communities and organisations, and in working with organisations to develop evaluation capability. Pam is the founding and current Convenor of the Aotearoa New Zealand Evaluation Association (**anzea**) and has a passion for innovation in evaluation and for developing approaches relevant to Aotearoa today.

What is evaluation? An introduction to evaluation purposes, design and methods

If you are a relative newcomer to evaluation and bemused by some of its complexities, or have questions about evaluation that you'd like answered, this workshop is for you! Through a series of practical, hands-on exercises, Pam will provide an overview of what evaluation can be used for, and an explanation of some 'basics' of evaluation practice together with some simple evaluation approaches, methods and techniques.

Workshop topics include:

- Understanding what evaluation encompasses and can be used for
- Differences between evaluation and research
- Types and styles of evaluation
- Triangulation and mixed method approaches
- Evaluation, ethics and values
- Some realities of evaluation practice – the 'sticky' bits

Participants will also have opportunities to have their questions answered and to share their own knowledge and experience. Handouts will be provided, including simple evaluation tools.

Dr Kara Scally-Irvine: Senior Consultant Evaluation Consult

Kara has proven research and analytical skills in a range of settings with experience in both qualitative and quantitative research. She now applies these skills to support organisations, in a range of settings, sectors and scale, to design and implement sustainable 'fit-for-purpose' monitoring systems, as well as in the delivery of robustly designed and completed evaluations. Kara draws heavily on her wide-ranging research background as well as her travels and life overseas to inform her practice, such as her experience researching human-wildlife conflict in the jungles of Cambodia! She is sensitive to context and need and the implications that these factors have on peoples' ability to build their capacity to undertake self-monitoring and evaluation.

Kara has a PhD (University of Queensland), as well as a Postgraduate Diploma (Distinction) in Environmental Science, a Bachelor of Science in Psychology and Zoology, and a Bachelor of Commerce in Management (University of Otago).

Jocelyn Brace: Senior Consultant Evaluation Consult

Jocelyn is a trained secondary school teacher with experience in programme development and evaluation in a range of different work contexts over many years. These include managing the research, development and strategy for training within New Zealand Police and as the manager of professional development with NZAID/MFAT. Jocelyn provides design and implementation support for organisations to support their monitoring and evaluation, and also specialises in strategy development, training and capability building.

Jocelyn has a Post-Graduate Diploma in Social Sector Evaluation Research (Massey University), Postgraduate Diploma in Development Studies (Victoria University), Masters in Education (Victoria University), Graduate Diploma in Business Administration – Conflict Resolution: Mediation (Massey University), Bachelor of Arts (Hons) in Geography (Victoria University), and a Diploma in Teaching (NZ).

Evaluating for results: A practical approach linking planning, monitoring and evaluation

This workshop will introduce DOME™ (Development Outcomes Monitoring Evaluation) - an approach to evaluation that links planning, monitoring, evaluative research, reporting and changing through a cycle. This practical approach provides timely results information, accommodates uncertainty and change and includes regular reporting cycles that support on-going decision-making. Ways of working and tools in each stage have been developed for use around the cycle. This approach can assist both beginning and more experienced evaluators directly in their work, and is also being used to build the monitoring and evaluative capacity of other stakeholders, such as programme staff within provider organisations.

This practical workshop will cover:

- An overview of the DOME™ cyclical approach to evaluation
- The three key stages of the cycle, including what each stage covers, how stages are linked together, and key tools used for each stage (such as models, data management, reporting)
- Examples of how this approach has been used effectively in diverse organisations, programmes, projects and contexts
- Questions and discussion.

Yoland Wadsworth is a Fellow of the Australasian Evaluation Society (AES) and author of best-selling *Everyday Evaluation on the Run* (3e Allen & Unwin 2011). She has received the AES ET&S Award for an 'outstanding contribution to evaluation in Australia', the AES Caulley-Tulloch Prize for Pioneering Evaluation Literature for the 'U&I' acute psychiatric services staff-consumer collaborative evaluation studies (with Maggie McGuinness & Merinda Epstein), and the AES National Policy & Systems Award for the Narrative Evaluation Action Research (NEAR) community health promotion capacity-building project for the Department of Health (with Karen Goltz, Ani Wierenga, Gai Wilson). She is Adjunct Professor, Centre for Applied Social Research, RMIT University; Hon Principal Fellow, McCaughey VicHealth Centre, University of Melbourne and Distinguished Fellow of the Action Research Center, University of Cincinnati. In 2010 her ground-breaking: *Building in Research and Evaluation: Human inquiry for living systems* was published by Allen & Unwin in Australia and New Zealand.

Exploring the implications for practice of a living systems evaluative inquiry approach

Living Systems Inquiry is an exciting new transdisciplinary theory of evaluative inquiry which brings together four ways of thinking about evaluation – firstly, as a process of looking at all living systems; secondly, as cyclic processes of evaluative action research per se; and thirdly and fourthly, as the personal and social inquiry cyclic processes that embody achieving this. Combining observation, reflection, dialogue about multiple realities, and the development and trialing of new approaches in evaluation practice in ongoing emergent processes, opens up evaluation to 'coming alive' and no longer being seen only as an 'after the event' activity, too late for useful change. In the first part of this workshop Yoland will present the Living Systems evaluation philosophy and approach, involve workshop participants and aided by examples from her practice experience. (See also the abstract for the Conference keynote address, 'Conceptualising evaluative inquiry for more truly living human systems'). In the second half the implications and consequences of this new way of thinking will be explored for workshop participants' own evaluation practice, using small-group discussions and short plenaries for sharing questions, comments and insights. Participants will acquire enough familiarity with the Living Systems inquiry approach to be able to work with it immediately, as well as build on it later in their practice to address characteristic evaluation challenges, puzzles and paradoxes.

The workshop will be suited to evaluation practitioners from beginners to the very experienced. Workshop participants will also receive two relevant journal articles as background reading in advance, and books and handouts will be available at the workshop.