anzea *Conference 2012 Abstracts*
(In alphabetical order of first author surname)

Evaluation influence in the real world: the role of evaluators and stakeholders
Paper presentation from Sarah Appleton-Dyer, Janet Clinton, Peter Carswell & Rob McNeill, University of Auckland and Melbourne University

Both evaluators and stakeholders have expressed a desire to support the influence of evaluation. Most evaluators want to see their work have an impact, particularly when it can support social betterment; equally stakeholders want to see their programmes improve as a result of evaluation. In reality however, securing evaluation influence is a complex process. The evaluation literature identifies a range of factors that are important for evaluation influence. While this evidence is useful for informing practice, it tends to focus on evaluation use and is largely based on evaluator perceptions. This paper seeks to build on this evidence by exploring evaluation influence from a stakeholder perspective. The findings from a literature review, an online survey and interviews with population health partnership members are combined to highlight the key evaluation attributes, stakeholder behaviour and contextual factors that are important for influence. This evidence is used to highlight the role of evaluators and stakeholders in facilitating evaluation influence in the real world. Specifically, the findings highlight the importance of evaluation attributes, including the evaluation approach and design, as well as stakeholder behaviour in facilitating influence. Particular attention will also be given to the implications of these findings for evaluation practice.

The challenges in measuring youth health and well-being outcomes at a local level
Paper presented by Robyn Bailey and Rae Torrie, Directors, Evaluation Works.

How does a youth one-stop shop (YOSS) find out if what they're doing makes a positive difference for the young people who use its services? There is no agreed set of national outcome measures in the youth health and development sector. Current outcome indicators and measures are predominantly negative which is at odds with the strengths-based youth development approach. Attribution of, or contribution to, outcomes is complex. While public (and private) funders want to know if their resources are achieving the desired results, funding for a YOSS to find this out this is scarce. To address this question, Kapiti Youth Support (KYS) teamed up with Evaluation Works Ltd and obtained funding from the Health Research Council's Research Partnerships for New Zealand Health Delivery Programme. This funding is designed for projects to take place in the 'real world', that is, for research and evaluation to occur as part of the work of, or in partnership with, a health provider. This presentation will highlight some of the theoretical and methodological challenges faced by the evaluators working with the myriad of intersecting, highly supportive and sometimes colliding worlds in this project – KYS, other YOSS, young people, Kāpiti and local Iwi/Māori communities, youth development and health practitioners and their sectors, and the worlds of government policy, funding, academia and evaluation.

Evaluating Mātauranga Māori in tertiary education
Paper presentation by Daryn Bean, Deputy Chief Executive Māori, New Zealand Qualifications Authority.

The New Zealand Qualifications Authority (NZQA) launched its first official Māori strategy *(Te Rautaki Māori)* in 2007. Since then NZQA has embarked on a major initiative to ensure appropriate recognition and validation of mātauranga Māori in the qualifications system. In 2009 the Hui Mana Tohu Mātauranga was held, at which 250 Māori educationalists considered the question 'what is quality mātauranga Māori?' The aim of the hui was to re-frame the conversation about mātauranga Māori towards achievement, excellence and scholarship. This was a major turning point. Since 2009, NZQA has engaged with Māori and the education sector to co-produce a values-based framework incorporating an authentically Māori approach to evaluative quality assurance of mātauranga Māori. With the guidance of Ngā Kaitūhono and by engaging meaningfully with Māori, the fruits of this initiative are now available for the tertiary education. This presentation will provide an overview of mātauranga Māori evaluative quality assurance. It will outline its purpose, its authenticity and its value to education organisations and students of mātauranga Māori.

How I fell in love….with evaluation
Poster paper presentation by Teah Carlson, University of Auckland

My personal experience of being a 'first time' evaluation researcher involved examining the effectiveness of a cultural and behavioural programme run in Auckland schools. The programme used a strengths-based approach to help Māori children achieve by building strong links between their learning environment at home and at school. The programme was driven by Māori language protocols and philosophies to build self-esteem and self-confidence for developing positive attitudes and behaviour. Mixed method and kaupapa Māori research approaches were used, including Kaupapa Māori methodology, cultural values and research guidelines. The evaluation vision was to walk alongside the client and stakeholders in a respectful relationship. The intent of this broadly ethnographic approach was to acquire a rich and deep set of relevant information that would provide insights into the multifaceted outcomes of the programme (Griffin & Bengry-Howell, 2007). I will discuss my struggles and triumphs during the project, including:
- Putting learning into practice
- Treading lightly, as past research had been undertaken and was not successful
- Negotiating the multiple realities of working with a government organisation, government employees, schools and Māori students and whānau members.

Reference
Griffin, C., & Bengry-Howell, A. (2007). Ethnography. In C. Willig & S. W. Rogers (Eds.), *Handbook of qualitative research in psychology*. London. Sage Publications.

Evaluating training programmes in the real world: a checklist approach
Workshop facilitated by Mark Dalgety, Mark Dalgety Consulting Ltd.

The evaluation of training or educational programmes takes place in the real world of tight timeframes, limited financial and human resources and conflicting organisational priorities. Not uncommonly this results in the evaluation being a form hurriedly completed by the participants at the end of the training

which is subsequently reviewed by the programme coordinator. This familiar scenario begs the question: what are the necessary components to robustly evaluate a training programme?

Michael Scriven has developed a user-friendly checklist of the 12 areas that he proposes need to be reviewed to ensure an effective evaluation of a training intervention. Some of these areas include a needs assessment, the relevance of the training, the retention and application of the training content. The presenter will outline these 12 recommended steps and offer comment on using this approach in Aotearoa New Zealand. The checklist will then be used to evaluate this workshop with the help of the participants. The primary aim of the session is provide participants with a tool they can understand, take away, adapt and use in their practice.

Hot tips for commissioning and managing actionable evaluation
Seminar presented by E. Jane Davidson (Real Evaluation) and Paula White Te Puni Kōkiri/Ministry of Māori Development

High quality, worthwhile, and actionable evaluation doesn't just depend on the technical competence and effective consultation skills of the evaluator. Decisions made and actions taken (or not taken) by the client can make or break the value of evaluation for an organisation. High-value evaluation is the product of a fruitful interaction between a well-informed client and a responsive, appropriately skilled evaluation team. In this session, we combine the internal (client) and external (evaluation contractor) perspectives on lessons learned from both stunningly high value evaluative work ("dream projects") and bitter disappointments (a.k.a. "Nightmares on Eval Street"), and use these as a foundation for a "hot tips" guide for those who commission evaluation, and for the evaluators who work with them, demonstrated with examples. We believe it is time for a radical rethink of the RFP process and the usual approach to evaluation project management, and we look forward to sparking a lively interactive discussion. We hope the audience will share their diverse evaluation perspectives on this subject, drawing on their own real world experiences. Evaluators helping clients get maximum utilization and value for their evaluation dollar will find this a useful guide for advice, support, and utilization-focused thinking and action.

Digital stories: using multi-media to report back information-rich research and evaluation results
Workshop facilitated by Rosalind Dibley, Department of Internal Affairs

This workshop will provide detailed information about how digital stories can be used to report back research and evaluation results. The workshop explores the development of digital storytelling and why technological trends mean that this technique is now easily available for all individuals to access. Attendees at the workshop will gain an understanding of the basics of digital storytelling and how they might be used in their practice. The workshop is broken down into four parts:

- ☐ Background to the development of digital storytelling
- ☐ Some examples of digital stories in international forums
- ☐ The key elements of digital storytelling
- ☐ A quick guide to developing a digital story as part of your practice

For those wanting further information on digital storytelling, my paper and presentation from the AES conference can be accessed at the following link. http://www.aes.asn.au/conferences/

Determining value with stakeholders using evaluative rubrics
Pauline Dickinson and Jeffery Adams, SHORE and Whariki Research Centre

This interactive skills workshop will enable participants to engage in a participatory process of developing evaluation criteria and performance standards with key stakeholders – in other words – determining value. Criteria are the aspects of an evaluation that define whether it is 'good' or 'bad' and whether or not it is valuable or not valuable. It is important to be clear when planning an evaluation about the evaluation criteria to be used as it helps to ensure that relevant data is collected, that stakeholders know how quality and success will be determined and provides clarity about what you need to get right. Participants will practice developing evaluation criteria for determining the value of an object and will develop a rubric of performance standards for what makes the object 'good'. We will then use a model programme logic from which participants will develop evaluation criteria and performance standards for an intervention and an outcome. Participants will consider the key sources of data and data collection methods that could be used to ensure data relevant to the criteria is collected. This workshop is most suited to those unfamiliar or with limited experience in using rubrics in their evaluation practice.

Getting real about what commissioners of evaluation really want
Seminar presented by Debbie Goodwin (DBZ Consultancy Ltd) and Kate McKegg (The Knowledge Institute)

What do commissioners of evaluation expect from an evaluation, and what do they get? Do these match up? What are the motivations behind getting an evaluation done? How do purchasers feel about their experiences and relationships with the evaluators? And what do they think about the results?

Debbie and Kate will discuss feedback they have gathered from a number of commissioners they have worked with in the recent past to help provide 'real' commissioners' perspectives. The aim of this paper is twofold:

1. To provide insight into purchasers'/commissioners' experiences and views about the evaluation they have been involved in, as well as their perceptions of the nature of their relationship with evaluators, and
2. Discuss and share the implications of commissioner feedback for evaluator accountability, self-reflection and practice.

Evaluation in the Shaky Isles: Impacts on evaluation when the real world changes around you.
Paper presentation by Kelli Graham and Kevin Jennings, Education Review Office.

The on-going sequence of earthquakes in Christchurch has had a devastating effect on the education community, like everyone else. How does such a crisis impact on people, relationships and responsibilities in evaluation work? In response to the post-earthquake environment in schools, early childhood centres and their communities, the Education Review Office (ERO) made a number of changes to reflect the new reality of Christchurch. One response was to develop a local inquiry to be included in the usual school and early childhood centre evaluation framework. The aim of the inquiry is to provide information on ways schools and centres successfully supported their children, families and community during the period of significant disruption and loss caused by the ongoing earthquakes and aftershocks in 2010, 2011 and 2012. The project will identify innovative and successful crisis management practices to share with teachers across New Zealand. This inquiry should help the education sector learn from the

experiences and responses of Christchurch schools/centres to a significant natural disaster, where the overriding need is to keep children safe, settled and learning. This presentation will report on the methodology and initial findings of this responsive evaluation. The theoretical framework is that of appreciative inquiry in order to highlight "best practices" to share more widely for learning purposes in the education community.

Evaluating the use of DoView by NGOs in the mental health and addiction sector
Seminar presented by Sarah Greenaway, Natascha Pancic, Richard Woodcock, Te Pou (Mental Health Programmes Ltd)

NGOs in the mental health and addiction sector have been providing services to their communities for many years, however to date there has not been a strong focus on developing programme theory and measuring progress toward outcomes. Te Pou, along with Platform Trust, has supported 10 NGOs to implement outcomes mapping systems in their organisations using DoView (a visual outcomes modeling software). An evaluation process has run alongside the implementation of the project to determine the usefulness of the DoView approach for NGOs and the extent to which DoView supported the development and use of an outcomes based system. In this seminar, members of the evaluation team and the project lead from Te Pou will present what we have learnt from the project implementation and evaluation to date. During this interactive session we will describe the different ways the organisations are using DoView to implement a systematic approach to articulating and measuring programme outcomes. This will include discussion of the following evaluation questions:
- How easy is it for NGO providers to develop and implement an outcomes-focused approach?
- What are the key enablers for the effective development and implementation of DoView?
- Which factors are important for the future sustainability of this approach?

We will also discuss the implications of the increased focus on outcomes measurement in recent policy documents, and how this may increase the demand for effective and efficient ways of managing for outcomes.

Sharing good practice: An approach to building capacity in self-evaluation in small tertiary education organisations
Paper presentation by Heather Hamerton, Bay of Plenty Polytechnic.

The New Zealand Qualifications Authority (NZQA) model of evaluative quality assurance requires tertiary education organisations to engage in ongoing self-assessment of their practice. NZQA evaluators conduct periodic external evaluation and review (EER). These EERs have been challenging for some private training establishments (PTEs) not previously practised in self-assessment. Sixteen managers of PTEs decided to undertake a collaborative self-evaluation of how each guides and supports learners as a way of assessing their effectiveness, learning from one another and building their capacity in self-evaluation. PTE managers and staff participated in a one-day writing hui during which each organisation compiled a case study of how their organisation guides and supports learners, including evidence collected as part of their everyday practice and information about how they use feedback to improve the supports offered to learners. In addition, two external evaluators conducted focus groups with learners from each PTE, and information from these focus groups was given back to each PTE for inclusion in their case study. Several good practice examples were identified; furthermore PTE staff reported that they learned a great deal about their own organisation and were able to debate different views of self-evaluation with others through their collaborative process.

'Keeping it real; making it meaningful'
Seminar presented by Kim Hughes, Review Officer, Education Review Office

Donna Mertens (2008)[i] sees evaluation as social inquiry resulting in more equitable outcomes and social justice. Evaluation must embrace the real issues of "language, culture and identity" and acknowledge multiple realities, especially those of marginalised peoples. ERO's revised methodology for evaluating schools is based on a transformative paradigm, where ERO's external review complements each school's own self-review, working in partnership with diverse communities to build school's evaluation capacity. The wide range of school contexts in New Zealand/Aotearoa presents a significant challenge to the ERO evaluator. An explicit emphasis on being culturally responsive helps ERO to keep the evaluation relevant and meaningful for schools, learners, and their communities. The principles for ERO's evaluations are:

- Equity of opportunities and outcomes
- Enquiry focus
- Responsiveness
- Transparency
- Collaboration
- Evidence-based approach

This presentation will explore the key principles that underpin the revised methodology and which help to keep the evaluation 'real' and focused on meaningful outcomes for marginalised learners. We will comment on the lessons to be learned for evaluators working in culturally diverse contexts and how evaluation can contribute to bringing about change in the real world.

[1] Donna Mertens, 2008. *Stakeholder representation in culturally complex communities,* in N. Smith & P. Brandon (Eds.), Fundamental issues in evaluation (pp. 41-60). New York: The Guilford Press.

You first or me? An iterative case studies design for evaluating organizational critical activities
Poster paper presentation by Dr. Wei-Hsi (Frank) Hung, Assistant Professor, National Chung Cheng University (Taiwan)

Organizational Critical Activity (OCA) is defined as activity which is considered by an organization to be closely linked to the present and future success in their industry, and which receives significant and ongoing resources and senior management attention. However, it is not an easy task to evaluate such activities, especially where management has concerns about being evaluated. The paper presents the findings of a research project which aimed to evaluate the organizational critical activities of eight universities in New Zealand. Due to the limitations of conventional multiple case studies design, an iterative case studies (ICS) design was utilized. In total, 43 semi-structured interviews with managers including Vice-Chancellors, middle-level managers, and web teams were undertaken, together with a comprehensive analysis of information available on each university's website. The results show that ICS is able to overcome several problems when evaluating OCAs through tapping into the views of management. Some implications will be discussed for evaluating OCAs in other industries.

Evaluating and evidencing peer support in Aotearoa/New Zealand
Paper presentation by Marge Jackson (KITES Trust) and Kate McKegg (The Knowledge Institute)

Toka Tū (Stand strong) is an evaluation and research project involving 11 mental health and/or addiction peer support programmes. The aims of Toka Tū are to increase the capability and capacity of provider organisations to undertake evaluation as well as to begin to develop a much needed evidence base associated with recovery-focused peer-support services in New Zealand. This paper will highlight and discuss key learnings of the project to date, including challenges and ways they are being addressed.

Practical ideas and tricks for evaluators
Seminar presented by Maggie Jakob-Hoff, Director, Resonance Research.

Maggie Jakob-Hoff has been working as an evaluation consultant in New Zealand since the last century and has completed over 100 evaluation projects – large and small. She currently works at the Werry Centre as their internal evaluator. Maggie has a wealth of practical experience and numerous tips she would love to share with participants. The seminar will present an overview of the core skills related to planning and undertaking an evaluation, including:
- Planning an evaluation project
- Fieldwork preparation
- Easy preparation of data for analysis
- Report writing.

This workshop is ideal for evaluators who are newer to the profession and will provide a solid grounding in several key evaluation competencies. Expect this session to be informative and entertaining. Come to learn new ideas and revisit old tricks - then walk away with a song in your heart.

Shoestring evaluation - a case example
Seminar presented by Julian King (Julian King & Associates Ltd, a member of the Kinnect Group) and Matt Appleyard (Community Waitakere Charitable Trust)

External evaluations can consume budgets of tens or even hundreds of thousands of dollars. In the real world, this level of resourcing is often not available to smaller, community-based organisations who want and see the benefits of evaluation for their organisation and, importantly, for the communities and people that they serve. In what ways can professional evaluators assist these organisations? In this presentation, Julian King and Matt Appleyard will showcase an evaluation that was undertaken within such a resource constraint, and the strategies used to ensure its quality and utility, with opportunities for audience input.

Exploring evaluator competencies for Aotearoa and you
Workshop facilitated by Syd King and Pam Oliver, anzea Professional Practice Development Team

In 2011 **anzea** published an Evaluator Competencies Framework which were developed by a team of local evaluation practitioners (providers, purchasers, teachers, theorists - with some input from other **anzea** members) for the Aotearoa New Zealand context. [Go to http://www.anzea.org.nz/index.php?option=com_content&view=article&id=91&Itemid=99]
A priority now is to put the Framework in front of evaluators and others across the country, to identify ways in which they can be used to the benefit of not only evaluation providers but also employers, evaluands, purchasers of evaluation and potentially other stakeholders. In this workshop we will give you an overview of the Evaluator Competencies, and then take you through some fun, hands-on exercises to (1) introduce you to a rubric-based approach to using the Evaluator Competencies, (2) identify how they may be useful to you in challenging and guiding your own professional development, and (3) get your ideas about ways in which the Evaluator Competencies might be used by others to improve practice in the evaluation sector, profession and industry. If you're interested in this workshop, it will be useful (though not essential) to glance through the Evaluator Competencies Framework beforehand.

Applied evaluative thinking
Workshop facilitated by Syd King and Kate Averill, anzea Professional Practice Development Team

'Evaluative thinking' appears to be an implied component of many if not of all the key areas of **anzea**'s 2011 'Evaluator Competencies'. Presumably 'thinking evaluatively' is a relevant skill and worth developing. But what does 'evaluative thinking' really mean? And what makes a good 'evaluative thinker'? In this session we will consider:

- What is our sense of 'evaluative thinking' in 2012?
- How might it be applied whether in on-going evaluative monitoring of activities or in more formal evaluation contexts?
- How do we think about what constitutes quality or value in evaluation? Indeed, how do we understand or 'know stuff' or conceive of 'truth' when it comes to evaluation?
- What does it take to apply evaluative thinking in fresh and innovative ways? And what might be the consequences of the absence of 'evaluative thinking'?

This mind-blast of a workshop will be an interactive combination of <u>rapid</u> presentations and <u>rapid</u> small group discussions aiming to challenge, make us laugh and - at the same time - progress our evaluative thinking about 'evaluative thinking' a little more. Headache medication will be available at the end …..

Making the complex doable: Practical evaluation frameworks that work
Workshop facilitated by Syd King (New Zealand Qualifications Authority) and Jane Davidson (Director, Real Evaluation)

Complex evaluation challenges require complex methodologies - or do they? If we accept that evaluation involves some means of determining the quality and value of things (such as programmes, policies or initiatives), how can we do that both as simply as possible and as robustly as possible?
This 45-minute practical and fun workshop will examine:

- a simple yet robust process for developing practical evaluation frameworks that actually work
- the basis on which we establish the principles or key features of the interface between what is being evaluated and the evaluation process itself
- how to develop effective key evaluation questions
- how to develop effective merit criteria
- how to develop effective performance criteria rubrics; and
- how it all works together to produce a satisfying conclusion both from the evaluators' and the clients' point of view.

The workshop will present ideas on how to do the above and some practical activities to try out your skills.

Contesting the real: Evaluation and control of narratives
Paper presentation by Saville Kushner, Professor of Public Evaluation, University of Auckland.

Who decides which reality we live in? It's an easy charge – 'come into the *real* world'. But as any teacher will attest, in a class of 30 students there are 31 realities. Realities are not manageable in such numbers, so we reduce them – we live in collectives - enough to make for a choice: 'I'll vote for them – you for the others'; 'the climate is changing – I don't believe you'; 'In my culture we do this – really? In mine we do it differently'. Evaluation thrives on diversity. If everyone agreed on a single programme reality (logic), we would be measuring outputs as though they were valued by all stakeholders in the same way – as though programme = consensus. It rarely does. And yet, we seemingly live in a world increasingly dominated by single narratives: 'this programme is the 'right' thing to do', 'humans are changing the climate in catastrophic ways', 'we can no longer afford State provision at current levels'. The original intention behind programme evaluation was to proliferate narratives, to deny singular 'narrative control', to affirm to government the political and contested nature of programmes. What are our responsibilities as evaluators when our contracts so often assume consensus and singular reality?

Social network methods as tools for evaluation
Paper presentation by Jenny Long, University of Auckland

Social Network Analysis (SNA) is a set of visual and mathematical tools for mapping and measuring relationships and social interactions. SNA has been recommended as a potential tool for evaluation, particularly for evaluations that are interested in inter- or intra-organisation collaboration or information exchange between members of the target community. During the presentation Jenny will give an overview of SNA concepts, describe examples of SNA's use in evaluation projects and describe

how SNA is being applied to evaluate a small school-based leadership programme in New Zealand. Jenny will also give an overview of some free computer programmes for SNA and discuss some of the challenges and pitfalls of SNA. The session will conclude with a group brainstorm on the potential uses of SNA for evaluation projects undertaken in New Zealand.

Ngā Huarahi Tika – using a transformative evaluation framework for dual therapeutic and evaluative outcomes
Seminar presented by Samantha Lundon (Ideal Success Charitable Trust), Pam Oliver and Jon Postlethwaite (Pam Oliver & Associates)

Ngā Huarahi Tika is based in Manurewa and supports tamariki and whānau who have been identified as at risk of not benefiting from the school system. Typically these whānau experience a range of barriers to benefiting from educational and other societal opportunities. The programme's Pou (support workers) work over 2-3 years with each whānau to identify their individual and collective goals in education, whānau development, whanaungatanga, cultural identity, and community engagement, and then to work systematically towards achieving those goals. Ideal Success collaborated with Pam Oliver and Jon Postlethwaite to develop a unique evaluation framework that would empower participating whānau members – adults, tamariki and rangatahi – to identify their personal progress as an indicator of both their own personal effort and achievement and the programme's effectiveness. The Pou support whānau members to evaluate their own progress, thus developing an ethic of reflective practice. Sam, Pam and Jon will outline the processes and tools that they used to build the framework, and then discuss how it works in practice, and the skills needed to use this approach. We will also invite the audience to share their ideas of ways in which evaluative systems can be used for therapeutic and transformative outcomes.

Adding value when evaluating health programmes
Paper presentation by Faith Mahony, University of Auckland

This paper will present several exemplars from the 'real world' which highlight issues that evaluators currently find themselves facing. Using recent evaluations of health programmes as examples, this paper will:

- Explore how evaluator, contractor and evaluee relationships can be developed to the advantage of all, mindful of need for management of boundaries and evaluation expectations.
- Outline the importance of taking every opportunity to be creative and use innovative approaches and synergistic relationships to explore evaluation options that will give added value to a programme. This will include reflection on what it is that makes funder – evaluator relationships work.
- Argue that assisting funders and stakeholders to refine their objectives and identify what type and size of evaluation will add the greatest value to the sustainability or adaptation of their programme.

Reflection and indigenous transformation
Seminar presented by Catley McIsaac, Te Wananga o Aotearoa, Turipuku Campus

Within the tertiary sector of Aotearoa/New Zealand, Te Wananga o Aotearoa is only one of three wananga (schools of higher learning) which delivers programmes led by and for Māori peoples. Ahua

Māori (Māori ways of being) are reflected in all aspects of the curriculum of the Diploma in Adult Education, which is designed for kaiako (tutors, facilitators of learning) working in both the tertiary sector and amongst communities. The aim of the diploma is to explore and to deconstruct and decolonise eurocentric educational practice in order to inspire transformative communities. The diploma is guided by kaupapa wananga, an indigenous epistemology for transformative practice. Through kaupapa wananga, the diploma emphasises reflection, rangahau and creative expression to identify and nurture praxis. Rangahau research outside the realms of academia, is both a method and a process which stresses self-reflective practice. This presentation will explore why and how cultural literacy is utilised to engage in reflective practice throughout the year long, full time distance delivery programme. The programme engages in e-learning (moodle), day long wananga, and noho marae (three day marae-based studies. Examples of cultural literacy, rangahau and collaborative learning will be offered. Participants will evaluate how different examples contribute to reflective practice and transformative learning.

Quality assuring tertiary education: rubrics, indicators and statements of confidence
Seminar presented by Alexandra McKegg and Kate Harker, New Zealand Qualifications Authority.

In August 2009 the New Zealand Qualifications Authority moved from auditing against set standards to using external evaluation and review (EER) as a key process to assure the quality of tertiary education providers in New Zealand. While universities are exempt from this process, Institutes of Technology and Polytechnics, Wananga, Industry Training Organisations, Government Training Organisations and Private Training Establishments are all required to participate in EER. EER employs evaluation methodologies, tools and processes to support NZQA evaluators to come to reliable and valid judgements about organisations' education performance and capability in self-assessment. It is expected that organisations will continuously review their own performance and make quality improvements informed by good analysis.. A summary of self-assessment activity is provided to the evaluation team to assist with the scoping of the review. This presentation will reflect on the new approach to quality assurance and will include a discussion on some of the challenges and interesting developments. A big challenge for many providers has been to shift their focus from processes to outcomes. Another challenge is the shift from ensuring that quality processes are well-documented to establishing that processes are effective.

Tackling wicked problems - evaluative processes that go to the heart of the inter-relationships, perspectives and boundaries that influence the outcomes of complex innovations
Group discussion facilitated by Kate McKegg (The Knowledge Institute) Judy Oakden (Judy Oakden Consultancy) and Wendy Boyce (Waikato Regional Council)

Sustainable agriculture is a concept, ideal and goal of many New Zealanders. Finding solutions for achieving sustainable agriculture is a highly complex problem, with a plurality of stakeholder perspectives and motivations and multiple objectives (economic, social, cultural, environmental).
Because of this complexity, solutions and options must be developed through processes of iterative stakeholder engagement and learning; rather than pursuing a more traditional planned approach to agricultural policy, a process of facilitating innovative thinking amongst project and programme stakeholders can create the conditions that lead to innovation occurring. In this session, Judy, Kate and Wendy will discuss their experience of undertaking an iterative staff engagement and stakeholder socialisation process within a regional council that focused on creating a better understanding of the

inter-relationships, multiple perspectives and boundaries of the sustainable agriculture 'system', and set out to create:

- the conditions that might support the development of innovative solutions to achieve sustainable agriculture
- the necessary monitoring and evaluative processes for tracking progress of the multiple work streams focused on achieving sustainable agriculture.

Participants will then be invited to contribute to the development of a suite of evaluative criteria for effective stakeholder engagement in evaluation – taking into account a range of different stakeholder perspectives and motivations.

Innovative strategies for recruitment and retention: Working with at-risk adolescents
Seminar presented by Diane B. Mitschke, PhD; Holli H. Slater, MSSW; Raytosha O'Neal-Jones, MA Ed. University of Texas at Arlington School of Social Work.

Designing an evaluation plan for a vulnerable and often transient population group such as adolescents who are at high risk for dropping out of school can present significant challenges to the evaluators. These challenges include: difficulty recruiting participants to the study; obtaining the consent of parents and assent of adolescents for participation; physically locating participants at various assessment points; and developing and maintaining a sense of trust and mutual respect between evaluation staff and study participants. This presentation will discuss the evaluation of Crossroads, a pregnancy prevention programme targeting adolescents ages 17-19 who are considered at high risk for dropping out of high school. The evaluation design for the Crossroads program consists of a randomised, two-group, cohort-based model with baseline, 3-month, 6-month, 12-month, and 18-month follow-up assessments of all participants. We will introduce a number of creative strategies that have been implemented with the purpose of boosting initial study recruitment and preventing study attrition over the duration of this longitudinal study. Samples of contact forms, reminder cards, letters, contact schedules and protocols, and other innovative strategies will be shared, and approaches to building trust among evaluation staff and participants will be discussed with opportunities for audience input.

Complementary evaluation - bringing theory and practice together through relationship and capacity building
Seminar presented by Carol Mutch (University of Auckland) Judy Oakden (Judy Oakden Consultancy, a member of the Kinnect Group) and Nicola Maw (UCOL)

The current political climate calls for evaluation practice that is both effective and efficient yet respects the significant nature of the relationship between evaluator and evaluand. Complementary evaluation, which balances internal and external requirements with accountability and improvement needs, not only meets efficiency and effectiveness demands, but also aligns with established good practice in evaluation. In particular, complementary evaluation facilitates both relationship-building and capacity-building. In this seminar, we hear from a theoretical perspective, an applied perspective and a 'lived' perspective on the benefits of using this approach. Experience has shown this way of working is:

- authentic, enabling a wide range of people to engage in a fair and transparent process, and to come to well understood judgments about the focus of the evaluation

- robust, in that the best possible use of existing and new data is effectively navigated, and multiple perspectives are valued in the data gathering

- pragmatic, in that it is easily implemented and flexible enough to adapt to the needs of different organisations, whilst keeping the integrity of the model itself.

This seminar will be of use to people who commission and conduct both internal and external evaluation and others who want to understand this approach.

Evaluating current tourism management education assessment at an institution of higher learning in Johannesburg
Paper presentation by Professor Angelo Nicolaides, Head of Department, Human Sciences Faculty, Vaal University of Technology

Vaal University of Technology (VUT) will soon introduce a course in Ecotourism Management. This is a critically important tool promoting economic development, job creation and poverty alleviation, especially in rural areas of southern Africa. Courses in ecotourism management seek to produce graduates who possess critical thinking skills. It is important to develop awareness of the need to balance the benefits of increased tourism with the need to respect and preserve diverse cultures and a fragile environment. The courses are aimed at developing graduates who can impact positively on society and who possess knowledge and the requisite skills in ecotourism management. This paper will evaluate the current state of Tourism Management education at another institution of higher learning in South Africa to determine whether effective student assessment systems are in place. It is hoped that any problems that are identified can be prevented in the proposed new offering at VUT. This will go a long way towards reducing the high attrition rate from courses and modules.

Evaluator accountability – Who evaluates the evaluators?
Seminar presented by Pam Oliver and Marnie Carter, **anzea** *Professional Practice Development Team*

Evaluation associations worldwide have been challenged to identify viable systems for facilitating the professional accountability of evaluation practitioners, given the diversity of avenues that practitioners follow into evaluation practice. To date only Canada has implemented a formal 'credentialling' system, which has been in operation for around two years and is being evaluated currently after a slow uptake by practitioners. As an alternative, the **anzea** Board has been discussing a 'Voluntary Peer Review' concept and model, based on systems used by other professions (including teaching and midwifery). The draft model has attracted interest and support from the United Kingdom and European Evaluation Societies. Now **anzea** is keen to get input from the evaluation community as to whether such a system would be of value to the sector in New Zealand. In this workshop, delegates will be presented with the challenge of evaluator accountability, and with the Voluntary Peer Review model, and discuss options for facilitating professional accountability and professional development through a peer review process. A draft 'Voluntary Peer Review' concept will be available on the **anzea** website for delegates to read for interest before the Conference.

Evaluating the Te Wananga o Aotearoa Te Tohu Paetahi Nga Poutoko Whakarara Oranga (Bachelor of Social Work) programme in Aotearoa New Zealand
Paper presentation by Don Parkinson and Shahul Hameed, Te Wananga O Aotearoa Hamilton Campus

The Te Wananga o Aotearoa (Bachelor of Social Work) degree programme, known as Te Tohu Paetahi Nga Poutoko Whakarara Oranga Biculturalism in Practice, is unique in the social work profession. The programme is consciously underpinned by the application of takepū (principles of action). The curriculum explores and reclaims tino rangatiratanga (absolute integrity and self determination) as a core component which aligns with professional social workers' characteristics. The graduates are able to

demonstrate, exhibit and <u>differentiate</u> their attitude, values and beliefs with other mainstream graduates in the social work profession. The Māori as well as the non-Māori bodies of knowledge embedded in the Aromatawai (assessments) process poses challenges to the evaluation practitioners when testing the 'effectiveness' of the Bachelor of Social Work against other Social Work programmes, due to its in-depth cultural components. This paper discusses applying aspects of takepū to real life situations through an 'evaluative lens' incorporating formative and summative evaluation techniques.

Tauira (student) evaluation at an indigenous tertiary education institute
Seminar presented by Awhina Paul, Karl Strother, Charity Tunoho, Te Wānanga o Aotearoa

Te Wānanga o Aotearoa is one of the largest tertiary education providers in New Zealand, and delivers a range of qualifications across multiple campuses nationwide. Whirirautaki is the office responsible for quality, programme review and tauira (student) evaluations. This presentation describes the realities of developing culturally appropriate and relevant methodologies for tauira evaluation. Some of the challenges Whirirautaki face in this task include: geographic spread of campuses; over 80 teaching sites throughout New Zealand; over 14,000 tauira population; tauira demographics; tauira ethnicity; and tauira gender. Results from recent tauira evaluations show that there is a strong social responsibility bias where quantitative data evaluates kaiako (teachers) and other evaluation areas very highly; however qualitative data are inconsistent and evaluates these areas much lower. The presenters will consider more appropriate ways of drawing out this feedback from tauira via forums such as focus groups and hui (meeting) situations to overcome these bias. This will be followed by an interactive discussion to seek feedback from conference delegates about their experiences with social bias, and practical ways to reduce social bias in order to gather rich and meaningful responses from tauira.

The anzea *Taumata – developing its relationships and roles*
Workshop facilitated by Robin Peace, anzea *Taumata member*

The **anzea** Taumata was established in 2008 to provide a structure and system for two key purposes – to give formal recognition to outstanding contributions to the evaluation sector in Aotearoa New Zealand, and to be the kaitiaki of **anzea**'s kaupapa, values and vision through providing mentoring and advice to the **anzea** Board and other Committees. In 2011 the first two members of the Taumata were appointed, and more appointments are expected in 2012. Robin Peace, as one of the founding Taumata members, will make a short presentation about her perceptions of the potential for the Taumata role, particularly in the context of emerging trends in evaluation in New Zealand, and then facilitate ideas and discussion with delegates about the Taumata's role in fostering the ethos of 'good evaluation' in the coming years.

Mixing it up: Evaluating outcomes in multiple realities and contexts
Paper presentation by Dr Deirdre Shaw, Senior Education Evaluator, Education Review Office

ERO's national evaluation of the curriculum provided in early childhood services is designed to respond to the complex realities of multiple government priorities, to evaluate outcomes in different contexts and to address the diverse roles and responsibilities of stakeholders. The drivers for the evaluation are new policy directions aimed at increased accountability in early childhood education, an increased focus on outcomes for children, and taskforce recommendations
(http://www.taskforce.ece.govt.nz) to review *Te Whāriki*, the New Zealand early childhood curriculum http://www.educate.ece.govt.nz/learning/curriculumAndLearning/TeWhariki.aspx).

The evaluation framework focuses on these policy directions and ERO's goals to increase the sectors' use of self-review for improvement. The evaluation is designed to build on the sector's professional interest in improving outcomes for children. Its alignment with *Te Whāriki* allows reviewers to focus on outcomes for children in the wide variety of services which characterises the sector, and to work in a complementary way that is responsive to the range of experience and understanding of self-review. This paper will highlight the practicalities, challenges and opportunities presented by designing and implementing an evaluation with multiple drivers in different contexts. The opportunity, within the evaluation process, to both use and improve the sector's understanding of factors that contribute to outcomes for children will be considered.

Transforming evaluator practice – Making the shift from 'primary' to 'complementary' evaluation

Paper presentation by Mary-Louise Stocker and Sandra Collins, Early Childhood Methodology project leaders, Education Review Office

This presentation will explore the transformation of evaluator practice in the real world of evaluating in New Zealand's early childhood services, as the Education Review Office (ERO) moves to new ways of working. In 2009 ERO began developing a new methodology for evaluating school performance. Underpinning the new methodology was a shift from 'primary' evaluation (that is, where ERO collected all information about the institution) to 'complementary evaluation', which involves a different kind of relationship between ERO and educational institutions – one that is a genuine attempt to bring internal and external evaluation together so that each meaningfully informs the other. In 2011 the revision of the methodology for evaluation in the early childhood sector began. This revision, focusing on the use of each service's self review has presented a subsequent opportunity to further transform reviewers' practice in undertaking complementary evaluation. The presenters will explore the types of shifts that are required of evaluators as they move from being 'primary evaluators' to 'complementary evaluators', and the impact on relationships, roles and responsibilities. They will share challenges and successes as ERO moves towards a process that fundamentally changes how ERO evaluators work in partnership with early childhood services to achieve improvements for some of New Zealand's youngest citizens.

The impact of collaborative review design on educational evaluation relationships, roles, responsibilities and results

Paper presentation by Robyn Sutherland and Robyn King, Review Officers, Education Review Office.

This paper will outline how evaluators in the Education Review Office (ERO) work collaboratively with stakeholders to design an evaluation that is strategic, focused and responsive to each school's 'real world'. The presenters will explore what is meant by 'review design' and the processes and aims of a review that is 'strategic and focused'. A review design tool will be discussed that could be used to guide the design of school reviews. The impact of a collaborative approach on the relationships and respective roles and responsibilities of school personnel (including educators and governors) and external evaluators (ERO) will be commented on. The presenters will propose that a collaborative approach to an evaluation that is strategic and focused is likely to significantly improve the results of the evaluation – that is, to achieve shared ownership of the process, build self-review capacity and, ultimately, improve outcomes for learners. The audience will have an opportunity to share their own experiences of review design and to respond to key challenges posed by the presenters.

Evaluating Māori NGO engagement at events: Evaluating the effectiveness of health messages from Māori to Māori
Paper presentation by Te Pora Thompson-Evans, Hapai Te Hauora Tapui: Māori Public Health

Hapai Te Hauora Tapui, a non-government organisation supporting Māori public health, recently conducted impact evaluations of health promotion and education messages provided to Māori at two separate events; Gamblefree Day in October 2011 and Whānau engagement at the 2012 Auckland Polyfest. The aim of these evaluations was to determine the effectiveness of health messages developed by Māori for Māori, and to determine if health promotion at cultural events is an effective vehicle for reinforcing health messages to Māori. This paper will first provide an overview of the methods used in the evaluation and discuss the evaluation results and implications. The results have indicated that health messages that are relevant, culturally appropriate and embedded in kaupapa and tikanga Māori are received positively by those targeted. Repetitive presence and association with events is well accepted by the community and has often led to the reinforcement of health messages. The results also strongly suggest that there is a positive link between Hapai Te Hauora Tapui's involvement in such events and how we employ kaupapa and tikanga Māori methods to promote health messages for Māori and the potential to influence healthy outcomes.

Exploring 'whole-of-government' and its implications for evaluation practice
Angele Toomey and Jane Renwick, Department of Internal Affairs

'Whole-of-government' strategies, initiatives and programmes are increasingly touted as providing the ideal mechanism for agencies to work together to address complex and intractable issues. The increased focus on this approach is likely to have implications for the practice of evaluation in Aotearoa. It seems timely to seek agreement on what 'whole-of-government' means, what it looks like and where it might work best (e.g. strategy, operations, knowledge management). Following that brief synopsis of current thinking in this area this workshop will facilitate an open dialogue with participants to garner their views on 'whole-of-government' in New Zealand - the lessons being learnt; the impact it is having on evaluation thinking and practice; and what it means for the communities we serve.

What's happening for whānau? The challenges of capturing, mapping, measuring and articulating whānau wellbeing and transformation through Whānau Ora
Panel discussion facilitated by Nan Wehipeihana and other presenters (to be confirmed)

Whānau Ora is an inclusive approach to providing services and opportunities for whānau across New Zealand. Through a community-led process of service reconfiguration, Whānau Ora aims to support 25 provider collectives to fill identified gaps in service provision in communities, tailored to whānau aspirations, goals and needs. A programme of action research, with an enquiry and learning focus, sits alongside provider collectives and includes a strong evaluative component, is intended to gather evidence of family-centred service delivery and family development as it is occurring. The evaluation of complex interventions, such as Whānau Ora, is inherently difficult because such interventions are often dynamic, learning initiatives. The goals for Whānau Ora are long-term and difficult to measure, the interventions are multi-faceted, and the context in which the intervention occurs is subject to rapid and on-going change. The presenters represent the commissioners of the research, Indigenous providers of whānau-centred community services and Indigenous evaluators. We will present a viewpoint from each of these stances. The discussion will centre on developing the programme of action research, the first

twelve months of implementation including the pitfalls and challenges of conducting such an ambitious programme of evaluation research, and key learnings to date.

Making a difference in social service outcomes: Results-based accountability in action
Paper presentation by Dr. Annie Weir, Director, Impact Research

Highly contestable funding for the provision of social services has meant providers are under increasing pressure to demonstrate the difference their service is making to the lives of their clients. Finding an evaluation tool that best demonstrates an organisation's achievements beyond financial accountability can be a challenge. This presentation is based on a research project that explored the challenges faced by a large New Zealand social service organisation, Presbyterian Support Northern, in its attempts to improve the quality of measurement and evaluation of organisational and service performance by implementing results-based accountability. This approach provides significant insight into how well services provided meet desired outcomes for clients. Participatory action research, with a mixed method approach, was used to investigate changes that occurred in the organisational culture and performance as a result of adopting results-based accountability. Senior management is committed to results-based accountability as a tool to demonstrate continuous improvement of programmes and improved outcomes for clients. Operational managers and their staff have become increasingly familiar with the processes of results-based accountability. However, it has not yet been fully enacted and inculcated throughout the organisation, in terms of staff fully valuing and believing in the concept and its associated practices.

Toi tu te pito mata o aromatai – Hold fast to the potential of evaluation
Paper presentation by Louise Were, Community Researcher

Evaluation Capacity Building (ECB) as a distinct evaluation perspective and one which has an impact on evaluation practice has emerged as an area of interest for the evaluation community. While there are multiple definitions of ECB, they emphasise that ECB is intentional, encourages evaluative thinking, promotes sound evaluation practice, advances the transference of knowledge and affects change. Evaluation Capacity Building (ECB) processes and practices have the potential to empower indigenous peoples and communities to self-determine their own evaluation agenda. Within our context in Aotearoa, it is critical that any potential benefit ECB frameworks can provide Māori, are assessed to ensure compatibility and alignment to Kaupapa Māori principles and guidelines for Māori research and evaluation. As a new graduate of the Massey University Post-Graduate Evaluation programme, Louise will reflect on and share her critique of ECB, the alignment between ECB and Kaupapa Māori approaches, and the relevance of ECB to the **anzea** evaluator competencies.

Evaluation through Māori eyes
Paper presentation by John Witana and Alan Tutbury, Māori Review Officers, Education Review Office.

The increasing Māori population in New Zealand is placing significant demands on early childhood centres and schools. Research shows a strong link between rich early childhood learning experiences and later success at school. Expectations for educational achievement and success for Māori, and as Māori, continue to rise. A significant tail of underachievement urgently needs to be addressed. The Education Review Office (ERO) believes effective evaluation is a vital contributor to improving centres'

and schools' capability to promote improved outcomes for Māori children and students. This seminar will examine new developments in ERO's evaluation methodology in response to cultural issues in education and evaluation. Reference will be made to ERO's own internal Māori Strategy plan, the principles and values (mātāpono) underpinning ERO's evaluation practice, and initiatives to evaluate through a Māori lens. The relevance of Māori values to evaluating within the context of other cultures will be raised. Key questions will include:

- Where do the values underpinning evaluation through a Māori lens originate?
- To what extent is evaluation through a Māori lens unique?
- Is it possible and desirable to use a Māori evaluation methodology in other cultural settings?
- How do we determine, and who decides, whether an improved external evaluation model leads to better outcomes for Māori students?

Te Aromātai: I te ao tūturu, te ao hurihuri, te ao hou
Evaluation: in the real world, the changing world, the new world
Paper presentation by Marge Wong, Education Review Office

When evaluating the quality of education in a state school, in a predominantly Māori community, a chorale of voices exists. This paper will discuss the complex task of managing the diverse voices. Positioned upon traditional concepts of mātauranga Māori and ways of knowing, this presentation asserts that evaluation practice that involves working with Māori must include culturally appropriate methods for gathering, interpreting and using data.

Drawing on the narrative tradition of indigenous evaluation, including examples from Hawai'ian, Native American and Aotearoa/New Zealand communities, this presentation will illustrate the necessity for culturally appropriate methods to be employed if evaluation is to be truly representative of indigenous stakeholders. The implications of these methods for the relationships, roles and responsibilities at the heart of the evaluation will be considered.

The transformative paradigm of evaluation (Mertens, 2008) supports the practice of illuminating the many voices, developing understandings in a contextually specific location and working ethically to ensure that findings are useful for the intended users. This paper will comment on specific Māori practices of kōrero, whakarongo, whakapapa, whānaungatanga, manaaki and aroha that can be used to support evaluation in and with Māori communities' real world – *Te Aromātai: I te ao tūturu, te ao hurihuri, te ao hou.*

Mertens, D. (2008). Stakeholder representation in culturally complex communities. In N. Smith & P. Brandon (Eds.), *Fundamental issues in evaluation* (pp. 41-60). New York: The Guilford Press.

'Knowing who I am: Effective strategies and initiatives that support Māori students to succeed and to succeed as Māori in schools
Paper presentation by Marge Wong and Raiha Boyes, Review Officers, Education Review Office.

Educators in Aotearoa New Zealand continue to be concerned that a significant number of Māori students in mainstream schools are failing to experience educational success and success as Māori. Through its Evaluation Services section, the Education Review Office developed a project that enabled Māori reviewers to find out what was happening for Māori students in a range of primary schools. This paper describes the appreciative inquiry approaches used by the reviewers to gather information about what schools were doing that engaged Māori students successfully and led to good levels of progress and achievement. The paper discusses how this approach identified the links between the instincts and

knowledge of teachers and the added advantages of cultural knowledge. The findings of the project are presented through the stories provided by teachers and principals.

The realities of rubrics… subjectivity and tacit benchmarking
Workshop facilitated by Norma Woodhead (AQ Consulting Ltd), Carmel O'Neill Gregory, and Pam Oliver (Pam Oliver Ltd)

Rubrics are increasingly being proposed in evaluation practice as (amongst other things) one solution to the issue of subjectivity and personal biases in joint decision-making in evaluation contexts, especially where large and diversely constituted teams of evaluators are engaged and consistency in the standards being applied is an important feature. However there are a number of challenges to using rubrics that are not always immediately obvious to the users, including some less-than-conscious heuristics and processes used in making judgments and decisions (Kahneman, 2011; Tversky and Kahneman, 2007). Workshop participants will undertake a fairly simple rubrics judgment scenario and task, based on a hypothetical evaluation scenario, and then examine the processes they used to reach their collaborative decisions and the implications of those processes for their judgments. From the workshop we hope to develop an understanding of some common heuristics used in applying rubrics, and some caveats or guidelines for using rubrics in evaluations.

References

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Thinking, fast and slow. Daniel Kahneman, Penguin, 2011.

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Working in a team of one - the realities of evaluators working in regional centres
Group discussion facilitated by Maree Young, Taranaki District Health Board

Evaluation practitioners who have worked or are currently working in regional centres/areas are encouraged to join this group discussion to explore the issues faced by evaluators who live and/or work in places where there is a very limited number of other people working in evaluation. How do people in these situations overcome professional isolation, ensure they are still current in their practice, and continue to play an active part in professional networks? How well is the practice of evaluation valued and understood in regional centres? What ways can evaluators work together to increase the evaluation capacity outside of the main centres? This group discussion will provide opportunity to connect with others working in the regions/provinces. Using a 'sticky wall' technique, participants will identify issues and barriers that they face in their everyday work. The group will then brainstorm solutions to these issues and barriers. Special focus will be given to how **anzea** may play a role is supporting evaluators working in relative isolation. The group discussion will be facilitated by Maree Young who has worked for the last seven years as a Researcher/Evaluator for Taranaki District Health Board.