



He kura te tangata

aotearoa new zealand evaluation association

www.anzea.org.nz

0800 EVALUATE (0800 382582)

NEWSLETTER

May 2009

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Convenor's kōrero

Kia ora koutou,

As I look outside my study room window, I can see the leaves on many of the trees around my house changing colour, dropping their leaves and becoming bare. We have had several days in a row recently of cold, wet weather, and snow is now beginning to fall in the mountains. So it seems that winter is well and truly upon us.

And as if the onset of winter wasn't quite enough to make us want to snuggle up, retreat and hibernate just a bit, but we also seem bombarded daily with the ill wind of world-wide economic fragility and instability. It is a very unsettling time, that seems quite unprecedented and therefore somewhat unknowable in terms of the likely downstream consequences for many people.

In light of world and local events, the **anzea** board felt it was important to reconsider our plans for our annual conference. The board's response has been to 'shift gear' somewhat, and commit to focusing all our attention on ensuring that we still have an opportunity to come together, to discuss and debate the questions and issues facing our profession in these disquieting times.

Shifting gear required us to think creatively about how we could have an annual conference that we could afford, that our members could afford, that would also be stimulating, thought provoking, and fun. Our decisions about our conference this year, I feel reflect this shift in gear, and I am confident that all of you who make it, will find it a memorable event.

Our conference convenor, Kataraina Pipi and the conference committee are hard working and inspiring, and totally committed to ensuring that the conference is a success. So I look forward to seeing you there.

In the current climate, the Board also recognises that one of the other vital services to members is local branch activity. It is at the local level, that **anzea** is able to demonstrate real added value to our members by providing low cost networking and professional development activities on a regular basis. We have allocated funds in our annual budget to helping support local branch development, but we need your support to ensure that we continue to prosper and nurture our profession. I would like to encourage you all to seek out the next local event, and even volunteer for the local committee!

Once again, I would like to thank you for your ongoing involvement in **anzea**. We are so very fortunate to have such a thriving professional community here in Aotearoa. Let's keep it that way. See you in July at the conference!!

Noho ora mai,

Kate McKegg
Convenor

Quotable quote

*"Change is perceived as painful by many,
though at times it would be more painful to retain the status quo."*

Kaufman, R., Guerra, I. & Platt, W. A. (2006).
Practical Evaluation for Educators. p.230

anzea Conference 2009

anzea's 3rd Annual Conference, to be held at Te Wananga o Aotearoa's Manukau Campus, in Canning Crescent, Mangere, Auckland.

This event is an excellent professional development opportunity intended to offer all those with an interest and involvement in evaluation the opportunity to be part of shaping the evaluation profession and evaluation practice in Aotearoa. Note that this year's conference has a different format to previous years, to reflect our desire to provide a high quality yet affordable event in these tighter economic times. The 2009 Conference theme is:

"Evaluation and social responsibility: New understandings, pathways and connections - Filling our knowledge baskets"
Na te aroha, ka puta mai te hohonutanga o te whakaaro.*

The world is changing rapidly. Adapting will be challenging for everyone. For evaluators and evaluation, we must all consider how our changing context might shape our profession and our practice. The three keynote speakers are:

Dr Zenda Ofir is from South Africa. Dr Ofir is an evaluation and knowledge management specialist. She has been a key contributor to the setting up and development of African evaluation associations. She works at national, regional and international levels and specialises in policy and program evaluation as well as institutional assessment.

Charles Waldegrave is from Aotearoa/New Zealand. Charles Waldegrave is a psychologist, a family therapist, an Anglican priest, and a social policy analyst and researcher. He is the Pakeha (European) Coordinator of the Family Centre. (The Family Centre is led by three cultural Coordinators – Maori, Pacific and Pakeha.).

Dr Fiona Cram is a Māori (indigenous) woman from Aotearoa / New Zealand. Her tribal affiliations are to Ngati Kahungunu on the east coast of Aotearoa. Fiona's company, Katoa Ltd, focuses on the facilitation of research and evaluation that is by Māori, for Māori. Fiona is well known for her presentations, workshops and numerous publications in the areas of Māori health, provision of Māori services, research and evaluation methodology and ethics and male violence against women and children.

All conference information will be posted on the **anzea** website as further details become available www.anzea.org.nz

anzea Membership

The number of **anzea** members at May 2009 is 167. The table below provides the number of current members per **anzea** region.

anzea region	Number of members
Northland	2
Auckland	48
Waikato/BOP	21
Central	1
Eastern	1
Wellington	71
Upper South Island	18
Lower South Island	2
Overseas	3
TOTAL	167

If you know of anyone who may be interested in becoming a member **please** direct them to http://www.anzea.org.nz/member_docs.htm.

- Benefits to **anzea** members include:
- A Newsletter published three times per year
- Regular member updates between Newsletters
- A bulletin service advertising job vacancies
- Discounted registration fees for the **anzea** annual Conferences
- A website, including a developing resource library
- Professional education and development events through regional Branches
- A Professional Indemnity Insurance Scheme
- An **anzea** Evaluator Mentoring Education and Brokerage service in development
- A professional body advocating for the interests of evaluation practitioners
- Being part of a professional and collegial network; making new contacts and expanding thinking and practice
- Links with other professional evaluation associations internationally.

Guest editorial

Evaluation in a Downturn: Threats and Opportunities

Dr. Alastair McPherson Visiting Research Fellow at Bentley University, Massachusetts, USA.

Public bodies are priming the economic pump at unprecedented levels. In some territories, governments, municipalities, states, and regions are launching projects to promote growth and sustainability. In other areas, projects and programmes face harsh choices. Regardless of whether governments use fiscal stimulus as a tool to climb out of an almighty economic hole, establishing value for money, and knowing what works or does not work is paramount. Expectations are high - accountability and transparency are critical for both funding bodies and beneficiaries as governments seek to build credibility, confidence and trust in much battered economies.

How do evaluators help their clients or organisations to show they are using public money in the best possible way? What counts as success? Clear approaches and effective evaluation standards are needed, yet at the same time are often the first casualties at a time of budgetary constraints. Is evaluation a tool for recovery, or is it, paradoxically, to be one of the victims in a quest for 'value for money'?

The focus here is on the shifting context for evaluation of economic development interventions in the UK, looking at some of the responses to these, and flagging threats and opportunities for the wider evaluation community.

There is at least one thing certain about the current economic downturn: it has exposed as never before the network of flows and relationships that define the global economy. Evaluators in many locations no doubt experience the challenges outlined for the UK.

The UK is facing tough economic times - this will put pressure on resources for evaluation just when it's needed most

A first consideration, in a time of cutbacks, is the likely pressure on evaluation budgets within the public sector. The UK economy is set to shrink by at least 3.5% - the worst economic performance since 1945, and public debt is piling up - perhaps reaching 79% of GDP by 2013/14. This is likely to be worked off through major cuts in public spending - some £35 billion by 2010/11 and pressure on a range of departmental and agency budgets across government including international development, communities and local government, health, enterprise and innovation.

The effect of this on evaluation budgets will depend on how well embedded a culture of evaluation is within public sector organisations - and whether it is accepted as integral to organisational development, transparency delivery and public sector reform. If not, evaluation risks targeting as an easy cost-saving area.

As others have argued, evaluation capacity is multi-faceted and needs to be located at many different re-enforcing levels. These include individual skills and competencies; arrangements with management; networks and partnerships between organizations; and the broader activities of professional organizations like **anzea**.

But a coherent evaluation system requires both scarce financial and human resources and the benefits produced by such a system will surely be undermined if there is insufficient investment in skills and management structures, for example in specialist evaluation units.

Accordingly, high-level political and management backing is essential at such a time. Those responsible for policies and programmes must remain convinced of the need for evaluation, and of the idea that the capacity of public institutions to conduct evaluation is a requirement that government must meet in order to address economic and social demands. If transparency and evaluation is demanded of others by Government, it will be demanded of Government by others.

Sustaining an evaluation infrastructure also takes time - on/off approaches to evaluation will not work - evaluation capacity needs long-term encouragement to deliver sustainable benefits. Radical shifts in policy direction threaten the successful building of evaluation capacity. This leads to a second issue affecting the evaluation of economic development in the UK.

New roles and responsibilities in UK economic development are creating challenges for evaluation capacity

In 2007, the UK Government's Sub-National Review of Economic Development and Regeneration looked at how to strengthen economic performance in regions, cities, and localities across England - through a re-examination of regional structures, organisations, roles, and powers. In the last year, this has been followed up by the Regional Development Agencies (RDAs) and local government re-drawing their relationships to strengthen and streamline arrangements for delivering economic development.

These moves acknowledge a continuing role for the RDAs in responding to the current economic downturn, but also mean closer alignment with, and responsibilities for, Local Authorities (as well as the business community and other stakeholders). Government is asking these groups to bring together priorities for economic development alongside planning, transport, housing and environmental objectives for the first time- with RDAs and local authorities jointly responsible for preparation, appraisal, monitoring, and evaluation of regional strategies.

These developments in England follow similar re-focusing in other parts of the UK: local government gaining greater responsibility for economic development; a greater emphasis on joined up programmes - social together with economic - all of which depend on the generation of outcomes and impact evidence.

Longstanding difficulties in evaluation of economic development

As new players enter the economic development arena, there remains a longstanding challenge around how to grapple with the effective evaluation of economic development initiatives.

Studies have consistently shown the difficulties in attaining consistent, comparable, and good quality evidence of economic development outcomes and impacts. The most recent, a 2009 review of the economic impact of England's RDAs (commissioned by the Department of Business, Enterprise and Regulatory Reform), serves to reinforce the point. Citing a partial evidence base, and inconsistencies in methods, the results demonstrated

the difficulty in assessing the overall performance of RDAs against some core objectives, and of making meaningful comparison between RDAs.

Therefore, with pressures already on evaluation practice from budgetary, as well as institutional reform, further longstanding methodological and standards issues remain.

Working with a range of bodies, the UK Treasury is leading a response to these evaluation challenges

All public spending proposals for policies, projects or programmes should be supported by a proportionate and well structured business case model at the heart of which lies assessment following HM Treasury's 'Green Book' guidance.

However, widespread and thorough adoption of the model and the underpinning methodology, as suggested above, remains a challenge. A key area, and one which the Treasury is actively working on, is the development of more detailed and standardised procedures and associated capacity building mechanisms.

Working with the National School of Government, academics, and a range of other stakeholders, the Treasury has developed a new programme for the Government Economic Service around economic appraisal- the heart of the business case. This programme is set to emerge as a de facto standard throughout government. Similarly, HM Treasury, along with Partnerships UK are building a curriculum for the delivery and roll out of training on the overarching Business Case model. These initiatives, with continuous method development, are a concerted effort to define a much more prescribed approach to business case development, including key elements of economic appraisal and evaluation.

Recognising the strengths and limitations of the approach

As organisations such as **anzea** know, there is an accepted need for the development of strong professional standards for evaluation practice - to ensure coherence and provide a basis for skill development and professionalization. The approach of the UK Treasury reinforces such supply side action to promote a skilled and professional community of practitioners.

There is no argument that among the key underpinnings of a professional evaluation community are education and training for evaluators, and quality standards and ethical codes agreed and shared among the commissioners and practitioners of evaluation including academics and consultants.

A centrist approach, as taken by HM Treasury, certainly ensures that a more coherent system evolves. Indeed, the persistent difficulties in ensuring good quality, coherent and consistent impact evidence fully justify the drive to unified standards. Nevertheless, this approach only goes so far. A balance is needed between a centrist approach and adaptation to local circumstances and the input of a range of evaluation stakeholders.

Some would argue that supply side issues are often best developed through national evaluation societies with open memberships and a commitment to high standards: there is a danger that centralisation by one coordinating sphere can risk undermining ownership and support for evaluation elsewhere in the public sector or among other stakeholders.

Developing evaluation capacity should be a shared concern of the wider policy community, including those who manage and commission evaluations, those who have an interest in evaluation results, and those who undertake evaluations.

The challenge for the evaluation community is to engage effectively with the processes underway and to add the weight of their experience to developing a more standards based approach to economic evaluations. For example, providing insights to applications in particular sectors or policy areas, enriching the application of methods at different spatial scales (local, regional, national, or international), and contributing to method development, particularly around integration of scientific/quantitative research design elements with naturalistic/qualitative elements.

Economic conditions, then, are changing and new standards for evaluation are being created. What does all this mean for private sector consultants, government departments and agencies, NGOs, and academics in the months and years ahead?

Conclusion

This brief outline of some current developments in the UK helps illustrate issues certain to be faced by the international evaluation community. However, any inherent threats are counterbalanced by greater acceptance of contributions to be made by evaluation to economic recovery- but not if it is business as usual. Certainly, in economic development evaluation, key challenges need to be met around capacity building and standards development - and it will be essential for professional evaluation organisations to be active and urgent in bringing those to a rewarding fruition.

About the author

Dr. Alastair McPherson is a Visiting Research Fellow at Bentley University, Massachusetts, USA (www.bentley.edu). Formerly appraisal and evaluation manager at a large UK development agency, he currently contributes to the development of economic evaluation approaches with the UK Treasury and National School of Government. He is also a Partner in The Additional Group (www.additionalgroup.co.uk).

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Auckland Branch news

WORKSHOP: *What makes an effective evaluation practitioner in the Aotearoa New Zealand context? Identifying evaluator competencies.*

Presenter: Pam Oliver and Tania Wolfgramm February 25 2009

Key evaluation competencies were identified and discussed in three groups. Attributes of these key competencies were classified into categories and their desirability debated.

Key competencies:

- Understanding of culture and cultural ways of knowing
[Originally "cultural competencies" and the "ToW" were originally recorded as one competency but were separated into two distinct competencies following further clarification and discussion.]
- Knowledge of Treaty of Waitangi
- Communication and written language skills
[Communication" and "open-mindedness" were originally grouped as one competency; however, communication and writing skills appear to fit better together, while open-mindedness seems to sit better alongside other personal characteristics]

- Project management skills
- Ethical practice
- Evaluation principles and knowledge, including range of methods and tools
- Open-mindedness, respect, resilience
[Resilience was added as a key characteristic of evaluators following further discussion.]

One Group's contribution:

	Knowledge	Skills	Attitudes
Core/Desirable	Principles of ethical practice Evaluation principles and processes (methods/tools/ rigour) Cultural competency and practice Standards of practice	Ethical practice Project management Communication Writing Data analysis Critical thinking Rigour Facilitation skills Networking	Curious Passionate Ethical Respectful Open Valuing of other worldviews Co-constructive Reciprocal Humility Resilience
Undesirable	Ignorance	Disorganisation	Rigid Arrogant Apathetic

Ellen Nicholson

2009 Auckland Branch events

The following events will be held at Phoenix Research, 8 Normanby Road, Mt Eden, Auckland, 5.30 pm – 7pm.

- May 20 **SEMINAR:** *Living in uncertain times - how the evaluation profession can help the public and policy makers solve today's key problems*
Presenter: **Paul Duignan**, Parker Duignan Ltd.
- August 26 **WORKSHOP:** *The PEOPLE System: An indigenous planning and evaluation approach for community-controlled enterprises 30 years on.*
Presenter: **John Raeburn**
- November 25 **WORKSHOP:** *What do evaluation providers need in an RFP? What do purchasers need in a proposal - Bridging the tender gap*
Presenter: **Pam Oliver**

For detail on the topics and speakers for each event, go to the **anzea** website.

Waikato Branch news

Any enquiries about Waikato/Bay of Plenty events can be directed to **Dallas Honey**
HoneyD@waikatodhb.govt.nz

Te Tairāwhiti

anzea is currently looking at levels of interest in setting up an **anzea** Branch in Te Tairāwhiti on the east coast of the North Island. If you would like to be involved in meeting with other evaluators and researchers in this area please contact Manu Caddie at manu@ahi.co.nz

Wellington/Lower North Island Branch news

The **anzea** Wellington/Lower North Island Branch kicked-off 2009 auspiciously with a “Fireside chat” with Michael Quinn Patton on Wednesday 4 March. Michael responded to attendees “burning evaluation” questions and the session was a great opportunity to engage with Michael and talk about trends in evaluation, and some practical evaluation dilemmas.

On Thursday 21st May we are holding our second event – well, actually 2 events. Jane Davidson is doing a mini-workshop on causal inference and a branch seminar on Value for Money. The mini-workshop is completely booked out and there is a large waiting list. But, it’s still not too late to think about coming to the seminar:

WORKSHOP: *Value for money - What does it mean for evaluators and commissioners?*

Presenter: **Jane Davidson,**

Date: Thursday 21 May 2009

Time: 5:00 - 7:00 pm

Place: Ministry of Education, 45 Pipitea Street, Level 3 (Rooms 3.25 and 3.26). Wellington.

The need to demonstrate value for money underpins accountability to Ministers and Parliament, effective management, and the ability of New Zealanders to understand how their taxes are spent. (Treasury 2008)

Value for money is becoming a key part of thinking in the public and NGO sectors. But, what should it mean for how evaluation commissioners think about evaluation? What sort of questions should they be seeking answers to? And, what does this mean for evaluation practitioners? What do they need to know and be able to do in this environment?

Jane will share her thoughts on these questions, with plenty of opportunity for (lively) discussion and debate.

Because the demand for Jane’s mini-workshop has been so great, we are planning to run some more workshops with Jane later in the year. The committee would welcome any suggestions for topics.

We are planning another branch event for mid-September (date and speaker(s) yet to be confirmed), which ERO will host in their Wellington National Office on Lambton Quay. To wrap the year up we will have a Christmas social occasion in early December.

melissa.weenink@minedu.govt.nz Wellington /Lower North Island Branch Committee

Christchurch/Upper South Island Branch news

Seminar: *Adding value through external evaluation*

Presenter: **Dr Carol Mutch,** Education Review Office. February 2009

This event was well attended with the branch enrolling some new members. Carol provided evaluators with a background of different theorists and how their approaches could be used to more effectively engage clients in external evaluation and leave them more able to conduct their own evaluations. Group tasks allowed for plenty of discussion and sharing of ideas. The interweaving of Carol’s own evaluation experiences helped those present to reflect on their own evaluation approaches.

Shaun Akroyd attended the April committee meeting and provided much support, clarification and direction for the branch. Committee members appreciated receiving copies of *anzea Branch "Easy Guide"*. It is providing us with the guidelines that we need to function effectively and to support each other in committee roles and responsibilities. Shaun's professional approach and willingness to help has also encouraged all committee members.

2009 events The following events will be held at Community House, Hereford House, Christchurch, 4 pm – 5.30pm, unless otherwise stipulated.

- May 22 **WORKSHOP:** *Purchasing evaluation: Tips and pitfalls*
Presenter: **Kim Sinclair**, HEHA; **Micheal O'Dea**, Partnership Health Canterbury and **Keith Tyler Smith**, Tertiary Accord of NZ.
- June 26 **SEMINAR:** *Running a small evaluation / self employed business – tips & tax breaks*
Presenter: To be determined.
- August 28 **SEMINAR:** *Walking a bicultural path.*
Presenter: To be determined.
- October 30 **WORKSHOP:** *Youth topic and youth evaluation work*
Presenter: To be determined.
Venue: Twisted Hop pub in Poplar St.

Please contact Libby – libpaul@globe.net.nz for more details.

Resources, conferences, journals

2009 Environmental Evaluators Networking Forum

What? The purpose of the Environmental Evaluators Network (EEN) is to advance the field of environmental program and policy evaluation through more systematic and collective learning among evaluators and evaluation users. The 4th annual Environmental Evaluators Networking Forum in Washington, D.C. will provide participants with the opportunity to exchange knowledge and experiences about the use and significance of evaluation in their respective organizations and disciplines.

Theme of the 2009 Forum: *The Value of Environmental Evaluation*

In the context of the diversity of the environmental community, participants will discuss and document the value and roles of evaluation in achieving environmental goals. The severity of environmental challenges coupled with the growing demand for evidence of what works and what doesn't creates an opportunity to communicate the fundamental importance of evaluation to key audiences. The EEN will distribute outputs of the Forum to diverse audiences (e.g., government agencies, foundations, non-profits, and academic institutions) in an effort to advance the practice, theory and policy of environmental evaluation.

Who for? Environmental evaluators and users of environmental evaluation, both domestic and international, in government agencies, foundations, consulting firms, non-profit organizations, academia, and international institutions who are well poised to contribute to the field of environmental evaluation.

Where? The George Washington University, Washington, D.C.

When? Monday and Tuesday, June 8-9, 2009

For updates and more on the Network and this year's Forum, go to: www.nfwf.org/een

And join the NEW www.Linkedin.com Environmental Evaluators Network group!

We hope to see you there and look forward to your participation:

Matt Keene Keene.matt@epa.gov

Matt Birnbaum Matthew.Birnbaum@nfwf.org

Evaluation Portal - Link Collection

The Evaluation portal, maintained by Lars Balzer, may be accessed via the link below.
<http://www.evaluation.lars-balzer.name/links/dissemination/blogs/>

The site lists links to useful evaluation blogs, and also contains a “Link Collection” which assists the site visitor to find interesting evaluation resources on the internet. A few of the categories are listed below:

- Events directories (9)
- Further education programs (8)
- Glossaries/dictionaries (18): monolingual, multilingual
- Journals (27): online (free access), printed
- Lists of evaluation experts (7)
- Online material: how to do evaluation? (24)
- Online material: what is evaluation? (6)
- Projects and studies (14): Project databases, single evaluation projects and studies, single projects and studies about evaluation
- Tools (free) (20): knowledge management, office tools, online surveys, statistical software
- Resources sorted by topic (45): Art/culture, economics, education, environment/nature, health care/health, international development cooperation, methods of evaluation, politics/policy, self-evaluation, social science methods

Other Useful Links

Free Resources for Methods in Evaluation and Social Research

<http://gsociology.icaap.org/methods/>

WWW Virtual Library: Evaluation,

<http://www.policy-evaluation.org/>

American Evaluation Association: Online resources list,

<http://www.eval.org/resources.asp>

CDC Evaluation Working Group resources,

<http://www.cdc.gov/eval/resources.htm>

NEWS relevant to evaluation and evaluators

To keep yourself informed about professional development events and other news relevant to evaluators, check in to the following websites each month:

Royal Society News: www.rsnz.govt.nz or www.rsnz.org.nz

Social Policy Evaluation and Research (SPEaR): www.spear.govt.nz

The National Centre of Mental Health Research. Information and Workforce Development:

www.tepou.co.nz/

Developing evaluation resources for developing countries

This project is about evaluation training or consulting in developing countries. This would offer free training or free consulting to projects in developing countries. More information is available here.

Free evaluation resources for developing countries:

<http://earth.prohosting.com/elecon/evaldevel/evaldevelopment.html>

One possibility is for training classes specifically prepared for program people in developing countries. The training material would be available on the web, in forms easily available for people with limited internet connection.

This is a call for folks to participate in this project, for example, by working in teams to prepare some of the on line classes, joining the project email list, or contributing any other way of interest.

Contact Gene Shackman Ph.D. for further information, contact info on the website.

The Global Social Change Research Project: <http://gsociology.icaap.org>

Free Resources in social research methods: <http://gsociology.icaap.org/methods>

Get involved!

Ways that you can get involved in **anzea** activity over the next few months include:

- Building regional membership – contact Nancy Sheehan
nancysheehan@clear.net.nz
- Help with redesigning and/or managing the **anzea** website – contact Tania Wolfgramm tania.wolfgramm@gmail.com
- Be a proof-reader for the **anzea** newsletters - contact Jane Carroll
jane.carroll@ero.govt.nz

Members' forum

anzea invites you to write to the Editor with news, ideas, grumbles, bouquets, or anything else likely to be stimulating or interesting to **anzea** members.

Developing a Sustainability/ Environmental Evaluators Network linked to anzea

Written by Alison Greenaway

There is growing interest in developing more integrated, outcomes oriented, environmental evaluation – moving beyond environmental impact assessment – to help councils, government, businesses and communities understand how change is occurring across social and bio-physical environments.

For example, the Resource Management Act requires the monitoring of District Plan outcomes against the four well-beings in the Local Government Act 2002 (social, economic, cultural, environmental) – but these are complex and more difficult to measure than poking a pH meter into a stream!

The opportunity exists for **anzea** to capture this interest and develop a supportive and dynamic network of people in the Sustainability/ Environmental Evaluation field. As such, a Sustainability/Environmental Evaluation pre conference Workshop is being held alongside the forthcoming **anzea** conference to explore how this network can be set up and for what purposes.

This pre conference workshop will run from 4.00pm to 6.00pm Monday 13th July, at Te Wananga o Aotearoa's Manukau Campus, in Canning Crescent, Mangere, Auckland. It will include:

- 3 short presentations to identify the range of areas this network might cover
- a discussion of potential network purpose, scope and activities.

To register for this workshop email info@anzea.org.nz clearly stating that you wish to attend this free workshop. For any queries please contact Alison Greenaway on 09 574 4133 (Mon and Tue). greenaway@landcareresearch.co.nz

Background to workshop

In June 2007 Manaaki Whenua Landcare Research organised a workshop in Auckland to look at evaluation practices and experiences of those working in the field of integrated environmental management. Seventeen people attended from Auckland and Hamilton, and all were interested in the challenge of evaluating strategies, policies and programmes that aspire to integrate environmental, social and economic activities and outcomes.

Participants expressed a desire for a regular forum to share ideas and skills, recognising that this work is required under the RMA but is very difficult to do, poorly resourced and with no clear leadership and few opportunities for training. Researchers at Landcare Research have for some time recognised this gap in evaluation capacity.

Alison Greenaway (a social researcher at Landcare Research) is wishing to support the establishment of a network linking those involved in the evaluation of sustainability and environmental programmes and policies with evaluators from other sectors. This is also an opportunity for people to learn how to evaluate across sectors (health, environment, welfare...) to understand how strategies developed in one sector can be monitored for impacts in another.

More recently Nancy Sheehan **anzea** has developed contacts with the Environmental evaluators' network (EEN) in Washington D.C. This network states that its purpose " is to improve the field of environmental evaluation by fostering partnerships where we can share knowledge on innovative approaches and learn more systematically from our collective experiences".

Its website shows that the "Network is comprised of environmental, conservation, and natural resource evaluators and evaluation consumers. Individuals from academia, consulting organizations, foundations, government agencies, and non-profit organizations are all welcome to participate. The membership is international".

See <http://www.nfwf.org/> and search under Environmental Evaluators Network for more on this. The EEN are looking to build stronger ties with evaluators in New Zealand working in the environmental management field and are proposing co-hosting a regional environmental evaluators forum in the southern hemisphere.

What has Health Impact Assessment (HIA) been used for in New Zealand?

Written by Rob Quigley and Carolyn Watts, Directors, *Quigley and Watts Ltd.*

Although HIA in policy and planning is still in its infancy in New Zealand, this is rapidly changing and HIAs have now been carried out on social, housing, transport, energy and

urban design proposals for central and local government. Quigley and Watts have undertaken a number of different HIAs in New Zealand. Examples include:

- [The Mangere Growth Centre Plan health impact assessment](#) for Manukau City Council
- [Healthy, wealthy and wise: A health impact assessment of Future Currents: Electricity scenarios for New Zealand 2005-2050](#) for the Parliamentary Commissioner for the Environment
- [The Greater Wellington Regional Land Transport Strategy health impact assessment](#) for the Greater Wellington Regional Council
- [Health Impact Assessment of Central Plains Water Scheme](#) for Canterbury District health Board
- Graffiti Vandalism Strategy HIA for Hastings District Council
- Class 4 Gaming Machine Policy for Nelson City Council

For examples of other HIAs Quigley and Watts have undertaken, check out our website: www.quigleyandwatts.co.nz.

What is health impact assessment?

Health impact assessment (HIA) is a multidisciplinary approach that investigates the potential health and wellbeing implications of a draft proposal. Its aim is to deliver evidence-based recommendations to inform the decision-making process about whether the draft proposal should go ahead or how it should be implemented. The HIA attempts to support the original aims and objectives of the draft proposal while also maximising gains in health and wellbeing and reducing or removing negative impacts. HIA represents a practical and innovative approach in the development of draft policies, programmes and projects.

HIA uses the broad definition of health promoted by the World Health Organization: “Health is a state of complete physical, mental and social well-being and not merely the absence of disease or infirmity” (World Health Organization Constitution).

Emphasis on factors which influence health and wellbeing across sectors

HIA recognises that many factors impact on people’s health and wellbeing. What determines health and wellbeing includes education, employment, income and inequality, and these tend to have a far more profound and longer lasting effect on health and wellbeing than health services which are designed to make sick people well again (National Health Committee 1998).

Health and wellbeing is mostly determined by sectors much wider than the health sector alone. This is why HIA attempts to involve stakeholders from many different sectors in the appraisal process outlined below. Also, many sectors goals and objectives can be more easily met by a well population – creating a real win:win situation for all stakeholders involved.

What does HIA involve?

Flexible methodologies are used to ensure the approach best fits with the proposal in question, the resources available, and the local populations affected. Typically, there are four main stages to HIA:

1. Deciding if a HIA should be undertaken

This stage decides if the potential impacts on health and wellbeing from the draft proposal warrant an HIA being undertaken.

2. Project planning and management

Having decided that the HIA will go ahead, this stage involves identifying the parameters of the HIA – the budget and timeframe, what on the focus will be on and who the priority groups will be. It also involves planning for the appraisal stage eg. questions for the literature review and key stakeholders that need to invited to the workshops.

3. *Appraisal and Reporting*

The appraisal stage involves gathering evidence to inform the HIA. This evidence typically comes from literature, from community profiles, from key stakeholders and is gathered via a literature review, workshops and / or interviews. From the evidence, a causal pathways model is developed that shows the evidence based links between the proposed policy and its potential impacts on health and wellbeing. A final report brings the evidence together and includes evidence-based recommendations. These recommendations relate to how the positive aspects of the draft policy can be enhanced and how the potentially harmful aspects of the proposed policy can be mitigated.

4. *Evaluation*

All HIAs have an evaluation stage built into their standard practice. This is to ensure HIA practitioners can improve their practice and to generate an evidence base about what works and what doesn't within HIA practice. A process evaluation (what was done, how, how much and what was important) and short term impacts (reach and effectiveness of recommendations) are typical components.

What has Quigley and Watts role been as HIA contractors?

As contractors we have taken on a number of roles. Our main aim is to work alongside the organisation and the community to improve the health and wellbeing of the people living in the area potentially affected by the draft proposal.

Full responsibility – we often lead and do whole HIAs ourselves

Partial responsibility – sometimes we do parts of the HIA such as the literature review and our clients do the rest

Advisory role – often we act as advisors or mentors, working closely with our clients who will lead the HIA and carry out most of the work themselves

Training role – we run introductory and advanced HIA training workshops across the country. For more information contact Rob Quigley: rob@quigleyandwatts.co.nz

HIA e-News – Quigley and Watts are contracted by the Ministry of Health HIA Support Unit to produce this bi-monthly newsletter for HIA practitioners. To sign up for HIA e-News contact Kate Marsh: kate@quigleyandwatts.co.nz

What is its relevance for evaluators?

HIA and evaluation have many commonalities and therefore, HIA is relevant to inform the field of evaluation and in turn be informed by evaluation.

- Like evaluation, HIA is a process that uses information gathered to improve a programme and to inform those making decisions about the programme.
- As with many types of evaluation HIA has a strong emphasis on working collaboratively and in partnership with other organisations.
- HIA and evaluation both place importance on reducing inequalities in health and working in a culturally appropriate manner acknowledging the central importance of the Treaty of Waitangi to Maori health.
- As with evaluation HIA seeks to obtain an in-depth understanding of an issue and proposed programme. The first two stages of an HIA include many of the same formative components of evaluation included in engaging stakeholders, describing a programme and focusing evaluation design.
- HIA usually occurs prior to a programme being implemented although retrospective HIA is possible (but not strongly recommended by HIA experts as the crossover with evaluation appears very high at that point). The HIA process has a lot in common with the formative components of evaluation.
- The causal pathway model developed at the end of the appraisal stage of HIA would fit within the logic model development stage of an evaluation.
- HIA uses many of the same research methods as evaluation.

- The skill set needed to be a good evaluator has many overlaps with that needed to be a good practitioner of HIA. In particular the skills needed to analyse evidence to judge merit and improve programmes.
- Further discussions between evaluators and HIA practitioners would be useful and profitable for both disciplines.

Quigley and Watts have found HIA to be very useful for ensuring programmes reach their maximum potential to improve and promote health. HIA provides a framework that enables diverse stakeholders to jointly come to decisions that maximise the health impacts of their programme while meeting the original goals and objectives of the proposal.

For more information about HIA check out:

Ministry of Health HIA Support Unit: www.moh.govt.nz/hiasupportunit

PHAC: www.phac.health.govt.nz/moh.nsf/indexcm/phac-hia

HIA Gateway: www.apho.org.uk/default.aspx?QN=P_HIA

Classified

The newsletter is a forum for advertisements relevant to evaluation – job vacancies, services offered, events – and there's no cost. To place an ad, contact the Editor, Jane Carroll via info@anzea.org.nz

How to join anzea

Membership in **anzea** is open to anyone with an interest in evaluation – there are no other eligibility criteria. The fee is just \$78.75 (incl GST) per annum and only \$50.60 (incl GST) for student or unwaged members. If you'd like more information about **anzea**, contact the membership secretary Rachael Trotman, or any other member of the **anzea** Board (contact details above in this Newsletter). To join, all you have to do is complete the attached membership form and send it with your payment to: **anzea** membership, PO Box 106732, Auckland. (If you prefer to pay electronically, see details on the membership form.)

anzea membership form 2008-2009

DECLARATION

I wish to become a member of **anzea**.

I agree to abide by the **anzea** Constitution and by-laws.

My membership status is (tick one):

- Ordinary member \$78.75 (inc GST)
 Student member* \$50.60 (inc GST)

*Requires evidence of full-time current student status as an accredited academic institution (please enclose photocopy of current enrolment confirmation).

Optional donation \$ _____

Total enclosed \$ _____ (Please make cheques payable to '**anzea**')
OR

I have paid \$ _____ by direct credit into the **anzea** bank account:

Name: Aotearoa New Zealand Evaluation Association

Bank: Kiwibank Ponsonby

Account: 389006 0153121 00

in the name of _____

[insert your account name]

NAME:	POSTAL ADDRESS:
PHONE:	
EMAIL:	
SIGNED:	DATE:

I give permission for my personal information above to be published in the on-line directory of **anzea** members.

I give permission for **anzea** to include me in emails that are sent to the **anzea** national or regional membership.

NB The following information is sought in order for **anzea** to suitably support a diverse membership and to facilitate the professional development of evaluators. Your answers will become part of a publicly available membership profile. Answering these questions is optional, but will be valuable in **anzea's** planning.

<p>CURRENT PRIMARY EMPLOYMENT</p> <p>Position:</p> <p>Organisation:</p>	<p>TRAINING AND QUALIFICATIONS</p>
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<p>GENDER: <input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Other</p>	<p>AGE: <input type="checkbox"/> 18-25 <input type="checkbox"/> 26-35 <input type="checkbox"/> 36-45 <input type="checkbox"/> 46-55 <input type="checkbox"/> Over</p>
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ETHNICITY/IES:

NZ Maori NZ European/Pakeha Other European Cook Island Maori Samoan

Tongan Nuiean Chinese Indian Other _____

IWI OR TRIBAL AFFILIATIONS (WITHIN YOUR COUNTRY OF ORIGIN):

N.B. This information is to help us identify members with specific cultural knowledge.

MAIN PRACTICE INTERESTS

SECTORS WORKED IN (LIST UP TO FIVE) - E.G. HEALTH, EDUCATION, LOCAL AUTHORITIES ETC.

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AREAS OF EVALUATION EXPERTISE - E.G. METHODOLOGIES (INCLUDING CULTURALLY SPECIFIC, OR CROSS-CULTURAL APPROACHES), SUBJECT MATTER AREAS, ETC.

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AREAS OF PARTICULAR INTEREST (IN ADDITION TO THE ABOVE)

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Office use only:

Date received:

Cheque banked:

Receipt number:

Confirmation sent: