



*He kura te tangata*

## **aotearoa new zealand evaluation association**

[www.anzea.org.nz](http://www.anzea.org.nz)

0800 EVALUATE (0800 382582)

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### **NEWSLETTER April 2007**

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## Convenor's kōrero

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Kia ora ano tatou, and welcome to our third newsletter. And special greetings to people who have joined **anzea** over the past four months.

There's been a lot of action in **anzea** over the past four months!

- The launch of the **anzea** Christchurch/Upper South Island Branch
- Reaching and passing a membership of 100!
- Launch of the **anzea** website [www.anzea.org.nz](http://www.anzea.org.nz)
- Appointment of a new professional Administrator, Jackie Pivach
- An all-day Board meeting in March
- Further planning for the **anzea** Inaugural Conference 2007
- The beginnings of a collaboration with the Australasian Evaluation Society (AES)

Since **anzea** was launched in August last year, the membership has grown steadily and is now over 120. Our 100<sup>th</sup> member is profiled in this Newsletter, and it's interesting to see that her reasons for joining are a reflection of the reasons **anzea** was started – for her own professional development and to advance evaluation as a profession.

In a recent conversation with Rick Cummings, President of the AES, we discussed a range of ways in which our two associations might work together, around professional education and professional support services, and in particular the further development of strong professional standards for evaluation practice, including indigenous evaluation. We'll send you more news on these developments later in the year.

What we'd really like is *your involvement* in **anzea**'s development – we'll be surveying you shortly to find out what your priorities are and how well we're meeting them, so that we have your views on **anzea**'s future direction and next projects. In the meantime, check out **Get involved** (p 22), to see where there's a need for your ideas and input.

I look forward to seeing you at the **anzea** Conference in July.  
Noho ora mai

Pam Oliver

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Thanks to a lot of creative work by many people – in particular Board members Geoff Stone, Tania Wolfgramm and Will Allen – the website was launched in early March. And it looks great! Our plan is for the website to become an interactive forum, and we'll be working over the next few months to develop systems for that to happen, so keep checking in to see what's happening – [www.anzea.org.nz](http://www.anzea.org.nz) - Branch events are also advertised there.



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We have recently set up telephone access so that members and others can contact us for a 'real person' if you have any queries. The number is 0800 EVALUATE (0800 382582).

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## anzea membership

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**anzea** membership now stands at over 120, with new members joining every week. New members have joined in the last three months from both North and South Islands, and one from Hawai'i!

### **Congratulations to our 100th member**

Congratulations **Lynda Wards** who recently became **anzea's** 100<sup>th</sup> member. Lynda works for ERO and has been for three years. She is married to Ross, an Anglican clergyman, and has had two children, tragically losing one in a car accident. She has a beautiful granddaughter Antonia, who is 4 years old. Lynda lives with her husband on the Kapiti Coast near the beach with their border collie Gup. Lynda has had a long and varied career as a teacher. She started off teaching dancing and later taught English and Social Sciences, was a Head of Department and Assistant Principal in secondary schools. Lynda is a past President of the NZ Association of Classical Teachers, was a Moderator for NZQA in a two subjects, and marked Bursary and Stage 1 History essays, amongst other things.

Lynda joined **anzea** when she was told about it by another ERO colleague and it seemed to her that **anzea** may be able to promote evaluation as a profession in New Zealand. Developing depth in evaluation is important to Lynda on a personal and professional level. She has been able to fit into her busy schedule the completion of 3 out of 4 papers (thus far) for the post-grad Diploma in Evaluation through Massey. Lynda also perceives a strength of an organisation like **anzea** is to encourage the sharing of resources, for example, supporting visiting speakers that the membership would like to hear and could further the shared knowledge and expertise of the profession.

### **anzea membership profile as at 24 March 2007**

**anzea** membership has more than doubled since its formal launch in August 2006 and now stands at 122, with new members joining every week. We've done an analysis of the membership (as at end of February), and found some interesting patterns:

#### Membership by geography:

Location	Number	Percent
Northland	1	00.92
Auckland	45	41.28
Waikato/Bay of Plenty	18	16.51
Central North Island	2	01.84
Wellington region	37	33.94
South Island	5	04.59
International (Hawai'i)	1	00.92



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Membership by profession:

Profession	Number	Percent
Private sector (independent consultants and research companies)	47	43.12
Central government departments	26	23.85
Academic Institutions	15	13.76
Crown Research Institutions	2	01.84
Local or regional government agencies and DHB's	11	10.09
NGOs	4	03.67
UN/International organisation	1	00.92
Profession not noted	3	02.75

Membership by gender:

82 women (75%):27 men (25%).

Iwi:

12 people (11%) have noted their iwi affiliations.

**Membership drive**

Now that we have **anzea's** infrastructure largely developed, we're keen to expand the membership, both in the main cities and beyond. Membership Secretary Rachael Trotman will be coordinating a membership drive over the next few months, so if you have some energy to help, ring Rach on 09 8183531.

*What you can do*

Please talk to your colleagues about **anzea**, send them the Newsletters, take them along to Branch events, and tell them about the value of **anzea** services. Remind people that they can recoup their annual membership fee easily by benefiting from the member discounts on the conference and local Branch events. Help us to promote the conference by sending people the conference brochures and encouraging them to offer conference presentations. Tell your colleagues that membership of **anzea** is seasonally pro-rated at just \$27.50 until 30 June this year – really a great deal!

And of course **please email us your ideas and feedback on anzea**, to [info@anzea.org.nz](mailto:info@anzea.org.nz) attention Pam Oliver.



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## **Interview with Pita Mataira (keynote speaker at this year's conference)**

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Takatu, takatu, takatu ko te winiwini  
Kia tau atu ai te wanawana  
Te tu nga atu ki runga  
Ka whakahangia mai te ora  
Ki te mauri kia ea ai te kii,  
Tehei Mauriora!  
Mihi atu ki nga tini aitua o tera, o tena, o tenei,

Haere ki nga tipuna i ngaro i te po,  
ki te ringa kaha o tatau Matua i te rangi.  
Tatou te hunga ora, ka nui te mihi aroha,  
A, Ko Hikurangi te maunga, Waiapu te awa, Ngatiporou te iwi.

### *Tell us a little about yourself?*

As one of eight children growing up in the small East Coast town of Ruatoria, I learnt at an early age the value of giving; of hard work; of respecting others and of sharing what little we had. I've always had a strong connectedness to my Wahi Tapu, to my family and to my extended whanau. My mother who is Ngatiporou taught me the value of living intuitively and acting responsibly, and of having a quiet unassuming temperament when faced with difficult times. My father who is Rongowhakaata, Kahungunu taught me the value of getting things done; of being composed and forgiving, yet, at the same time practical, firm and sincere. Together, my parents taught me what valuing "sense of self and sense of place" was all about.

I'm very passionate about the state of wellness between we human beings and the land we take custodial care of, and I believe strongly in promoting better ways to balance polemic dichotomies of social, environmental and economic imperatives (the "triple bottom line" so to speak). I believe there is a place for building sustainable communities that focus on community assets, strengths and ways of utilizing meaningful 'local' social entrepreneurship.

My social work, sociology, and social policy education has afforded me a deeper sense of understanding the dynamics – cyclic and linear cause and effect - of society's unmet needs and its systemic failings. My work as a community developer, organiser, educator, advocate, trainer, researcher and husband, father, musician and "staunch" All Black supporter, have privileged me with wisdom, an analysis, and an articulation of theory and ideas that I constantly test, retest and try always to put to good use. Having taught social work in Aotearoa-NZ and here in the United States I feel very privileged to have the opportunity of bridge the potentials of possibilities and perspectives, much the same way as the Pacific Ocean divides us at the surface, but intrinsically connects at the deep seabed level.



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On a family note, I am blessed to be married to a wonderful Tainui and Ngapuhi woman, Margie, who along with our 5 intuitive children keep me grounded and very much connected to the mundane.

*What role has evaluation played in your previous roles and what does evaluation play in your current role?*

For the past 20 years assessment and evaluation work has played an important and significant part in my professional activities particularly as I have become more engaged in performance related reviews, organisational audits, service planning, GIS and social and economic impact studies, community assessments, agency accreditations, strategic planning, and capacity building activities. Currently in my work at the University I manage external research projects and am heavily engaged in the design and implementation of community based evaluation studies. I have been privileged to be able to provide consultation to Native Hawaiian and Pacific Island community groups and I continue to serve as principal research investigator and research advisor to students, peers and agency involved in self-studies.

*What made you join **anzea**?*

Principally, my need to stay connected to the work being done at home, and being able to reciprocate ideas and practices. I believe it is important to be accountable to the wider community, to stakeholders and clients. Being a member of **anzea** affirms my commitment to maintaining high standards of practice and professional behaviour. There is currency, given the new climate of collaborative partnerships and inter-agency cooperation to establish and formalise a set of comprehensive competency standards that ensure the work evaluators do is culturally responsive, timely, appropriate, relevant and meaningful. As this type of work shifts to (re)empowerment and participatory research design there will be a greater need to establish better community-researcher relationships and effective communication systems.

*What do you think is unique about Aotearoa-NZ evaluation?*

I'm proud and very impressed with the innovative and open style in which evaluation work is being conducted in Aotearoa-NZ, and, I am encouraged by the groundswell of interest in doing high quality evaluation research. From your 'insider' perspective it may difficult to see the advances taking place; however, from an outsider's perspective I certainly see much to be enthused about.

*What contribution do you think Aotearoa-NZ evaluation can make and will make in the future for evaluation practice in the Pacific region and further field?*

I think **anzea** will be a key organisation; one at the leading edge of innovative evaluation research. It will be a leader that affirms and advances practices that go beyond the rhetoric; one that validates important values of community and indigenous processes.

There is much to be gained from what is happening in the Pacific, and in Aotearoa-NZ, which is why, I suppose, there is great interest developing here in Hawaii.



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## Following up on Michael Scriven's editorial from November 2006

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### Answers to the 'Four Minute Entry Exam'

In the editorial given in the last newsletter Michael Scriven offered up a challenge to the anzea membership of the "Four Minute Entry Exam", which requires giving a clear explanation of:

- (i) The difference between research and evaluation;
- (ii) Why evaluation is not applied social science;
- (iii) Why flawless evaluation reports sometimes contain no recommendations or explanations; and
- (iv) How you justify the value premises in evaluations.

This is an opportunity to compare your own answers to these questions with the ones provided by Michael. Here are Michael's own views – see what *you* think! send your answers to [info@anzea.org.nz](mailto:info@anzea.org.nz) (subject heading 'anzea Newsletter') and we will publish them in the next Newsletter.

#### Answers:

(i) Research is the process (and outcome) of establishing or discovering or organizing facts, including explanations and predictions, by systematic skilled investigation. Many of those facts are 'bare' facts, plain empirical claims or classifications; but some of them are facts about the merit, worth, or significance of the things being studied. The latter, and only the latter, are evaluations, and the work it takes to establish them is the process of evaluation. It involves not only the establishment of plain empirical facts, but the combination of those with relevant and demonstrable values.

(ii) Applied social science, as it is still normally practised, is concerned with empirical research about human behaviour (and, according to some of its practitioners, also about human thought and feelings), aimed towards the solution of practical or 'real world' problems. It cannot establish evaluative conclusions because it does not accept value premises as scientifically valid, hence it cannot encompass evaluation whose business it is to establish exactly those conclusions.

(iii) An evaluation establishes the relative or absolute worth, merit, or significance of something. Arriving at such a conclusion does not require, nor does it include, any explanation of how that thing operates, or acquires its merit (etc.); we can easily show that a Patek Philippe watch is an excellent timekeeper without having any idea how its mechanism or manufacture enable it to achieve that status. Similarly, we can often establish that someone is a dangerous criminal without being able to make any recommendation whatsoever about how s/he should be treated or ignored. Evaluative conclusions are highly relevant to such recommendations, but it is a matter of simple logical fact that they do not incorporate them or entail them; further premises are required in order to support recommendations, and the same is true of explanations.

(iv) The value premises in an evaluation run the gamut from definitional truths such as



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'murder is wrong' to practical wisdom ('health insurance is a highly desirable fringe benefit'). It follows that they are established in a variety of ways, ranging from logical analysis, as in the first example, to a combination of empirical and evaluative investigation, a hybrid type of induction, as in the second. There is no need to suppose that there are any ultimate value premises, other than definitions of value terms: we typically build up systems of value from factual premises, including premises about human preferences--think of how medicine developed the system of values that support claims about the unhealthy aspects of smoking.

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## Board news

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### Board meeting March 2007

The Board's activity over the past six months has been largely on getting **anzea** infrastructure, policy and strategy established, branches set up and the website launched – all essential to a sound and sustainable association. Our third Board meeting was held on March 12 in Auckland, with the usual stacked agenda. Much of the business focused on the development of **anzea** policy and strategy which are essential to good governance and delivery of services to members, and interesting to figure our way through in a bicultural (and multi-cultural) association. Other key items on the agenda included:

- Looking at establishing strategic relationships with both other evaluation associations internationally and associated professional bodies locally, so that we don't duplicate their work, and do contribute to and benefit from their developments
- Collating information on evaluation education and training opportunities available to people in New Zealand
- Identifying 'gaps' in current evaluation capacity, and ways in which they might be addressed.

**anzea** is currently talking with SPEaR in particular about ways in which **anzea** might be involved in facilitating Māori evaluation capacity.

### Board resignations

We are really sad to lose two of our valuable Board members at this stage – Madhu Chatterji and Jane Davidson. In both cases they are moving overseas – Madhu has taken up a new job in Darwin, while Jane is moving with her partner to his homeland, Japan. We're grateful for the work put in by them both, and look forward to having them as 'outpost' **anzea** representatives!

### By-election – Call for nominations

As a result of the resignations, we are now undertaking a by-election and calling for nominations for two new Board members.

There are just two eligibility criteria for Board nomination:

- The person must be an **anzea** member at the time of the election (which will be the last two weeks in May this year)
- They must have given their permission to be nominated.



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#### *Making nominations*

To nominate someone, just obtain their permission, send an email to them asking them to accept nomination, and then forward their email acceptance to [info@anzea.org.nz](mailto:info@anzea.org.nz), with 'anzea Board nomination' in the subject heading, by no later than 30 April 2007. You are welcome to nominate either yourself or any other **anzea** member. You can nominate someone who is not yet an **anzea** member as long as they join before the date of the by-election. The election will be held in the last two weeks of May and new Board members announced at the beginning of June.

#### *The Board's work*

The current Board term is to the end of June 2008. We're keen to have people on the Board who are from the regions, can provide a community voice, and/or who have skills relevant to evaluation practice. The Board's work is focused on a range of portfolios, and involves attending three full-day Board meetings per year (expenses paid), and undertaking some development work in between meetings. Current portfolios are:

- Secretary (Rachael Trotman; associate Jo Adams)
- Treasurer (Nancy Sheehan; associate Pam Oliver)
- Strategic planning (Pam Oliver)
- Strategic relationships (Kate McKegg)
- Funding and resourcing (Tania Wolfgramm; associates Nancy Sheehan & Kate McKegg)
- Communications (Pam Oliver)
- Membership (Rachael Trotman)
- Branch development – Jacqui Henry (associates Will Allen and Pam Oliver)
- Conferences (Anne Dowden; associates Pam Oliver and Michele Lennan)
- Māori evaluation development (Laurie Porima; associates Jacqui Henry, Tania Wolfgramm)
- IT development (Will Allen; associates Tania Wolfgramm & Geoff Stone)
- Professional development (Jane Davidson; associate Kate McKegg)
- Special projects (Pam Oliver).

If you would like more information about what the Board does, feel very welcome to contact any member of the Board – their contacts are set out below.

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### **anzea Board contact list**

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Name	Phone	Email
Jo Adams	09 9219999 x 7115 0272 424589	joanne@womens-health.org.nz
Will Allen	03 3219600 0274 934213	allenw@landcareresearch.co.nz
Jane Davidson	09 5751982 021 382593	jane@davidsonconsulting.co.nz
Anne Dowden	04 462 6405	Anne.Dowden@researchnz.com
Jacqueline Henry	07 8382569	HenryJ@waikatodhb.govt.nz



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Rachael Trotman	09 8183531 021 2065440	rachael.trotman@xtra.co.nz
Tania Wolfgramm	021 389169	tania.wolfgramm@xtra.co.nz

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## Auckland Branch news

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### Who does what at anzea's Auckland Branch Committee

The **anzea** Auckland branch committee members distributed between themselves a few roles and related tasks for the year. Just to let you know who does what:

As the Convenor, Michele Lennan, convenes and chairs the meetings, ensures that all Committee tasks are undertaken, acts as spokesperson and a first point of contact for the branch, sends out the agenda and the friendly reminders for follow-up. She also manages the role of the Treasurer and keeps the accounts in order.

Jane Carroll is the Branch Secretary and ensures that our meetings are minuted and Committee members are assigned tasks. In addition Jane is responsible for membership liaison, which involves coordinating Branch membership drives.

The Auckland branch keeps its connection with the **anzea** Board through Pam Oliver. Pam also handles the Newsletter coordination to ensure people are designated to provide identified newsletter contributions, collate content and send to the Newsletter editor.

And lastly, as events coordinator, Rina Tagore is responsible for ensuring that all Branch events are well organised and promoted, including the allocation of event planning tasks across the Committee. If you have a great idea for a Branch event, contact Rina [rina@tagores.com](mailto:rina@tagores.com).

### Recent Auckland Branch events

#### The on-going journey of the role of the evaluator

*Seminar provided by Janet Clinton, Senior Lecturer in Evaluation, Centre for Health Services Research & Policy, School of Population Health, University of Auckland*

This 1.5 hour evening workshop, the first event of the **anzea** Auckland group for 2007, was attended by over a dozen evaluation practitioners. It was a highly interactive session based



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on Janet's exploration into the role of the evaluator in the contemporary evaluation context. Janet shared her personal journey from teacher to counsellor/psychologist to evaluator-and back! She described the process undertaken to develop the evaluation of the "Let's Beat Diabetes" (LBD) programme and how her personal views on the role of the evaluator, traditional methodology, and the interaction between evaluation and research have been challenged as part of that process.

LBD is a five year, \$10 million district-wide plan for Counties Manukau District Health Board, New Zealand, aimed at long-term sustainable changes to prevent and/or delay the onset of Type II Diabetes, slow disease progression, and increase quality of life for people with diabetes. It incorporates ten distinct but interrelated areas of activity ranging from developing community leadership to engaging with the food industry, influencing urban design, and development of social marketing. A '*whole society, whole life course, whole family*' approach is integral to the plan.

As Janet described, the evaluation framework and implementation plan was designed collaboratively with a community evaluation reference group and uses the CDC&P (1999) evaluation framework as its foundation. The aim of the evaluation is to conduct an independent programme evaluation, to guide and promote organizational development of LBD, to foster a learning environment, and to build capacity in evaluation and research workforce. The evaluation team were seen as true partners in bringing about societal change.

Jane stimulated discussion by suggesting that role of the evaluator is moving to a place where we often find ourselves moving into intervention roles-in a context where formative evaluation and action research methods are common, and collaboration and partnership with evaluands is encouraged. During the session, participants shared their experience from their own practice and their perceptions of multiple roles. The group generally agreed that our bicultural approach in Aotearoa NZ (underpinned by Te Tiriti and its principles) gives us an 'edge' internationally in terms of engaging with our communities and building relationships. We discussed the tension between the role of evaluator and many of the other roles Janet had identified, including ones relating to capacity building such as advocating, advising, teaching/training, brokering and networking. Most agreed that those roles were compatible with what lay at the heart of the LBD programme: strengthening the community.

In addition to identifying a wide range of roles that arose working alongside the LBD, Janet also recognised that, because there were a range of stakeholders, there was also a diverse range of evaluation requirements, ranging from understanding the individual changes in health, to organizational development, and finally measuring population change in diabetes. To address these many needs required challenging traditional research and evaluation methods and creating new approaches. Janet stressed the need for ongoing, frequent communication to ensure feedback to all stakeholders so that information was disseminated in a timely, useable manner.

Questions that Janet put to the group included:

- Have I come full circle from intervention practitioner to evaluation practitioner and back?
- Have I evolved 'too far'?
- What about objectivity and purpose?



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- Where do 'judgement' and 'standards' fit?
- Where is the line between 'brokering' and 'intervention'?

The group discussed whether those questions were indeed an issue, and generally agreed that our roles do in fact involve more than 'evaluation'; and for that reason it is important to keep asking ourselves those questions. It was suggested that we often practice evaluation *in the context of* community and organisational development. It is therefore important for us as practitioners to clarify with stakeholders where our boundaries are, and expectations of what we can and can't (or will and won't!) do. Also, for ensuring some 'objectivity', important 'safety nets' were identified- while the focus of the LBD programme was process evaluation and the programme itself determined what was important to measure, there was also the backup of collecting population data. The challenge remained in integrating the different sets of 'evidence' and data, and introducing a culture of evaluation into the communities involved.

Janet's story raised some interesting dilemmas and tensions that all present at the workshop could relate to. Her questions were very pertinent for the evaluation community in Aotearoa NZ, and are likely to remain unanswered for a long time yet! One issue that we need to keep reminding ourselves and clients, is that programmes such as LBD are intended to effect change in the long term, and therefore it is unlikely we can answer the question: "Is this the 'best' investment of resource?" and "Does it bring about societal change?" within most evaluation project timeframes.

Jo Adams

Reference: Centers for Disease Control and Prevention. (1999). Framework for program evaluation in public health. MMWR, 48(No. RR-11).

### **"Would you like the good news first or ...?" Communicating evaluation findings effectively**

*Workshop facilitated by Pam Oliver, independent evaluator/researcher*

Given that a key purpose of most evaluations is to identify ways in which the entity being evaluated can be improved, communicating evaluation findings with integrity – to both the people commissioning the evaluation and those providing the programme, service or strategy being evaluated – typically requires both tact and tactic. Providing even constructive critique can create challenges for all involved, especially in pilot programme evaluations or when an action research model is being used.

Ten people including both public sector and independent evaluators had some hearty discussion on a wet and wild Thursday evening at the end of March, discussing the kinds of challenges commonly encountered in giving feedback to both funders and evaluands, and some ways in which the process can be made most effective. Out of their discussions, Pam will be writing up some draft guidelines for managing evaluation feedback well, and these will be made available in summary form with the August Newsletter.



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### **Forthcoming Auckland Branch events**

MAY

Date: Thursday 17 May 2007  
Topic: *Appreciative inquiry - its place in evaluation*  
Speaker: Mike Hollings (State Services Commission)

Mike Hollings, chief executive of The Correspondence School, will present a seminar on the role appreciative inquiry (AI) can play in an evaluation context. He will share from his own experience of using AI to effect organisational culture change and how this can be applied to evaluation.

Mike has had more than 30 years of wide-ranging experience in the education sector, from the chalk-face through to management and review. He began his career teaching in primary and secondary schools. He has worked in the tertiary sector at the Hamilton College of Education where he established a graduate diploma in Bilingual Education and at the University of Waikato to teach Maori language and Applied linguistics. Since 1989 he has worked in a number of Government Agencies in Senior Management positions in both policy and operations (Te Puni Kōkiri, Ministry of Education, Education Review Office, State Services Commission). Mike worked for more than 3 years as CEO of Te Mangai Paaho (The Maori Broadcasting Funding Authority).

Date: Thursday 17 May, 5.30 to 7.30 pm  
Venue: Phoenix Research, 8 Normanby Road, Mt. Eden  
Cost: \$25 - Drinks and snacks will be provided, and you are very welcome to stay on for more informal conversation afterwards.

RSVP: [rina@tagores.com](mailto:rina@tagores.com)

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JUNE

Date: Thursday 28 June 2007  
Topic to be determined.  
Education Review Office's evaluation work and methodology in schools and early childhood.  
Speakers: Dale Bailey & Jan Adams (ERO)

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AUGUST

Date: Wednesday 22 August 2007  
AGM  
Speaker: To be announced

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OCTOBER

Date: Tuesday 16 October 2007  
Evaluation in developing countries  
Speaker: Panel discussion with Nancy Sheehan & others



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## Waikato/Bay of Plenty Branch news

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The Waikato/Bay of Plenty **anzea** branch was officially launched on November 23rd. Since then the Committee has met twice, and focused so far on sorting out the various Committee roles and on best ways to meet the needs of local Branch members. As a committee they are keen to support ideas for events that may be initiated by non-committee members and link in with other local organisations and groups that have planned complimentary events in the region. The Committee has agreed that it will organise a quarterly Branch event which will be open to members and others. Currently they are rotating the role of convenor and secretary at each monthly committee meeting which is working really well. A number of roles have also been distributed among the members for the year and the key contact person for WaiBop branch is Jacqui Henry. Jacqui is also a member of the **anzea** Board and so acts as a liaison between WaiBop committee and the board. Jo Cottrell manages the role of treasurer, Kellie Spee is responsible for getting branch information into the newsletter and Wendy Boyce ensures the WaiBop membership list is up to date. It's a winning formula and committee meetings have been lots of fun, full of enthusiasm!!

### Recent branch events

#### An introduction to evaluation

*Seminar facilitated by Kate McKegg, The Knowledge Institute*

The first event for WaiBop was a seminar facilitated by Kate McKegg which was both interesting and thought provoking. Kate discussed evaluation - what it is and what it isn't. Differences between research and evaluation were highlighted and evaluation standards of utility, feasibility, propriety and accuracy were outlined. There was some great conversation generated around what is the definition of success when evaluating, and the importance of determining what evaluation clients see as good, very good or excellent outcomes. It was clear throughout the presentation how important it is to set the scene and get the evaluation off to a good start, to be clear about why you are evaluating and to know what future use the evaluation will have. Feedback from the audience following the seminar was extremely positive and there were a number of people there who were just beginning to work within the evaluation field and found the presentation very useful.

To close the first event Wendy Boyce facilitated a 15-minute skill mapping session. People identified the skills and interests they had and the skills and interests they were seeking. This provided some key information about what workshops, presentations or seminars WaiBop members could gain the most benefit from. It also provided an opportunity for people skilled in a particular area to offer their knowledge to others. It was a very useful exercise!

### Forthcoming events

JUNE

Date: Wednesday 13 June 2007

Topic to be determined

Speaker to be determined

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SEPTEMBER



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Date: Wednesday 12 September 2007

Topic to be determined

Speaker to be determined  
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## **Christchurch/Upper South Island Branch news**

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The **anzea** Christchurch/Upper South Island Branch was launched on 28 March in Christchurch. Fourteen people braved squally rain and toasted the new Branch in the surrounds of the City Council's beautiful heritage building. Six others sent their apologies.

The main needs identified from the people who celebrated the launch were around networking, education and training, skills development and professional support, and several people offered ideas for events for the first year.

An energetic new Branch Committee of seven was elected (remarkably without any apparent peer pressure) and immediately began planning for the next 12 months! The Committee consists of Will Allen (Landcare Research, and also an **anzea** Board member), Libby Gawith (a community psychologist, and possibly the best networked evaluator in the country), Pam Glover (independent contractor), Shirley Mercer (ERO), Roberta Hill (Web Research), Sarah Wylie (independent contractor), and Chrys Horn (Landcare Research). Read about them in the profiles below.

Big thanks go to Libby Gawith and Will Allen for leading the development of the Branch and putting major efforts into engaging local people across a range of sectors.

The Branch Committee will be meeting in early May to figure out their roles and make some plans for Branch events. If you would like to be involved, call Libby (03 3374136) or Will (03 3219600).

### **Canterbury/Upper South Island Branch Committee member profiles**

#### **Sarah Wylie**

Having first spent several years working in central government departments as a research analyst, for LTSA followed by the Crime Prevention Unit of DPMC, I have worked for nearly ten years as an independent evaluator and community researcher based in Christchurch. Although my research has been broad ranging in that time, my particular areas of focus are youth justice and youth work provision, community needs analysis, recreation / leisure planning, and social service evaluation and needs analysis.

#### **Libby Gawith**

I am happy to be part of the Christchurch or upper south island branch of anzea. I have been very impressed at how professionally organised the whole of anzea has become and look forward to getting some exciting events and great learning happening in Christchurch. I work as a tutor at Christchurch Polytechnic Institute of Technology and have done most of my evaluation work over the last 15 years in the mental health sector, here and in the United Kingdom. I am still busy with 3 children under 10 and love the weekends and holidays.



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### **Will Allen**

Kia ora tatou. I am a participatory research specialist with more than 15 years experience in natural resource management. I work for Manaaki Whenua - Landcare Research, where I lead a social research group looking at ways of encouraging learning-based management approaches in organisations and communities. I am particularly interested in how participatory monitoring and evaluation (PM&E), and knowledge management tools can help this. I also have experience in public relations and the use of the Internet to support social networking. More information on my work and background can be found from our Collaborative Learning for Environmental Management web pages <http://social.landcareresearch.co.nz>, and my own NRM-changelinks portal on participation and change <http://nrm-changelinks.net>. I appreciate the opportunity that I have been given as an anzea Board member to contribute to the development of evaluation in Aotearoa.

### **Roberta Hill**

From a distance I've watched the steady development of anzea with growing admiration. Now I'm able to commit time and energy to the newly-formed Christchurch Branch. WEB Research is a small research company established in 1994 to carry out research and evaluation in the areas signalled in our name: Work, Education and Business. WEB has specialised in case study-based evaluations, developing a methodology jointly with the Department of Labour. We have a particular interest in evaluation methods that are developmental, and draw on aspects of developmental work research and activity theory in our work.

### **Shirley Mercer**

I have spent most of my career in education. I firstly worked as an early childhood teacher and centre manager. I have worked as an evaluator with the Education Review Office for the previous sixteen years. The Office has given me many opportunities to develop my knowledge and skills of evaluation. These include regular reviews of early childhood centres and schools, external contract work and internal review of ERO's own systems and practices. In 2006 I completed a Post Graduate Diploma in Evaluation. I have joined anzea to find out more about evaluation in other sectors and the wider community.

### **Pam Glover**

I am looking forward to being involved with the newly formed Christchurch anzea Branch. I have experience evaluating for government agencies prior to having a long child care break. I have been working locally with a colleague evaluating in various areas including Mental Health, Plunkett and Well-being programmes, on a part time basis. I am now looking to work as an independent evaluator and wish to continue studying evaluation started at Melbourne University some years ago.

### **Forthcoming events**

The first Branch Committee meeting will be on May 10 at 7.30 pm at 289 Memorial Ave, Christchurch.

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## **Wellington Branch**

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As Wellington membership grows, we will be canvassing Wellington region members about what your preferences are for the best way to provide you with **anzea** services. An email be coming your way soon, so watch out for it.

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## **ACC classification of evaluation practice**

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If you are an independent evaluator or a research and evaluation company, you will have had to register for ACC re-classification of your work recently, and you may have run into the same difficulty that some other **anzea** members have reported in finding a classification that seemed appropriate. For example, the two categories that people were assigned to most often, from feedback so far, were “Scientific Research” and “Business Management Services” The ACC is undertaking a review of its work categories in 2008-2009, and **anzea** has been in touch with their Levy Management Unit to discuss a more appropriate classification for evaluation practitioners. If you felt that accurate classification was an issue for you, we’d love to hear from you – contact Pam Oliver on 09 3727749 or [info@anzea.org.nz](mailto:info@anzea.org.nz) (subject heading ‘ACC classification’).



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## Developing anzea services

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### Legal opinion service

The planned legal opinion service has been delayed, but is planned to be available in May this year. If you are able to provide the names and contact details for any lawyers you have used for evaluation work, please send their details to Pam Oliver [pamo@clear.net.nz](mailto:pamo@clear.net.nz).

### On-line members' register

A service that we hope to have available by mid-year is a full list of **anzea** members on-line, including details which will identify their areas of practice and expertise. This will of course be available publicly, and we hope it will facilitate people making contact with **anzea** members for a range of purposes.

### Professional indemnity insurance - anzea members' group scheme

We are currently negotiating with insurance brokers to see whether it is possible to secure discounted professional indemnity insurance for **anzea** members. We'll be in touch soon, so watch for emails from **anzea**!

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## anzea Inaugural Conference 2007, 8-11 July

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Some fascinating presentation proposals have already come in from people planning to present at the Inaugural **anzea** Conference 2007, to be held at Masterton's beautiful newly refurbished Solway Copthorne Hotel and Resort July 9-11.

Pre-conference workshops are on July 8-9. Book these dates in your diary now!

If you would like to offer a presentation to the conference, **get your proposal in by May 15** (the form is available at the end of this Newsletter, or on the website [www.anzea.org.nz](http://www.anzea.org.nz), or contact Pam Oliver at [info@anzea.org.nz](mailto:info@anzea.org.nz) ).

*The 2007 Conference theme is...*

**Where is the *value* in *evaluation*? Leading, learning, and participating in change**

### Keynote speakers

**Pita Mataira** (Ngāti Porou and Ngāti Kahungunu) is a Professor at the University of Hawaii's School of Social Work, where he teaches courses in community development and community organising, social welfare policy, generalist practice and human behaviour in the social environment. Pita's current research work is in community-based programme evaluation, programme design, and organisational capacity building, and the indigenising of research methodologies. Pita's most recent publication was a co-authored chapter entitled *Issues and Processes in Indigenous Research*.

**Patricia Rogers** is Associate Professor in Public Sector Evaluation and Director of CIRCLE (Collaborative Institute for Research, Consulting and Learning in Evaluation) at



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the Royal Melbourne Institute of Technology (RMIT), Australia. For more than 20 years she has been involved in monitoring and evaluation projects - ranging across multiple sectors as well as many levels (federal, state, community). Her main interests are improving the impact of evaluation through developing the evaluation capacity of organisations and the use of programme theory and systems thinking. Patricia has published widely and received a number of international awards for her work in evaluation.

**David Fetterman**

David is renowned throughout the evaluation community for his work on empowerment evaluation. He is a member of the Office of Medical Education in the School of Medicine at Stanford University, and a Consulting Professor of Education at Stanford. For a decade he was the Director of the MA Policy Analysis and Evaluation Program in the School of Education at Stanford University. He is a past-president of the American Evaluation Association and the American Anthropological Association's Council on Anthropology and Education, and has received a number of awards for his work in evaluation theory and practice. He has consulted internationally, and is the author of several books on evaluation.

**Pre-conference workshops**

Several quality conference workshops will be offered for Sunday 8 to Monday 9 July. These will be hands-on, interactive sessions that provide an opportunity to acquire new knowledge and develop insights, as well as learn new skills or hone existing skills. These will be provided by both local and overseas people with strong reputations as both evaluators and as trainers. Presenters will include:

Pita Mataira	<i>Values in indigenous evaluation</i>
David Fetterman	<i>[Topic to be advised]</i>
Patricia Rogers & Kate McKegg	<i>Building evaluation capacity in organisations</i>
Paul Duignan	<i>Set your outcomes models free! Abandoning the traditional constraints on outcomes models</i>
Geoff Stone	<i>Building communities of (social/evaluation) practice: Using the internet and "social software" for learning, development and change</i>
Pam Oliver	<i>Creative evaluation design – Building ethnography, utilisation and stakeholder partnerships into evaluation design</i>

**Dates and venue**

We've chosen the Conference dates so that they don't conflict in any way with other conferences (SPRE, AEA, AES) that you might be wanting to attend. We've found a conference location close to Wellington which still allows for the peaceful away-from-it-all feeling that people have loved so much about the AEG-sponsored national evaluation conferences at Acacia Bay, Taupo over the past three years. The Solway Copthorne is a lovely piece of Wairarapa history which has been recently renovated for conference purposes, and promises to be an excellent, friendly, warm venue. The conference cost will be very affordable, and the accommodation cost includes free train or bus transfers to and



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from Wellington. Budget accommodation options will be posted on the **anzea** website in January.

We're letting you know now so you can book the dates into your diaries, and book flights if needed. The programme times are as follows:

Pre-conference workshops	Noon Sunday July 8th – Noon Monday 9th
Conference	Noon Monday 9th – 1.00 Wednesday 11th
<b>anzea</b> AGM	2.00-3.00 Wednesday 11th

Both airlines still have well priced fares available. Free bus transfers will be available from Wellington to the venue and back. If you are booking flights and want more information about the transfer times, please email Michele Lennan [mlennan@ihug.co.nz](mailto:mlennan@ihug.co.nz).

We'll have more information about pre-conference workshops out to you very soon, together with a call for contributions. Meantime please pass this panui on to your networks – we're advertising by email only.

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## **International Organisation for Cooperation in Evaluation**

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The IOCE has been established through the collaborative efforts of several evaluation associations who saw the value of a formal network to facilitate the sharing of knowledge and resources internationally (see the following section on **Resources**). It is based in Canada and its membership comprises both established evaluation associations and informal evaluation groups. The **anzea** Board has been considering membership of the IOCE, but has held back because of constraints on affordability given our current small asset base and other priorities. However it is our intention to make contact with the IOCE to discuss ways in which we can collaborate with the organisation or obtain some kind of membership that reflects our financial constraints.



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## Resources, conferences, journals

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### **Mentoring for evaluation practitioners**

The following resources on 'learning organisations' and mentoring were provided in a workshop last year by Charmaine Pountney, and have been found useful by people who attended Charmaine's workshop on mentoring for evaluation practitioners.

- Duin, Baer, Starke-Meyerring. *Partnering Learning in the Marketplace*, Jossey-Bass, 2001, San Francisco.
- Tobin, D. *Transformational Learning*, John Wiley & Sons, 1996, USA/Canada.
- Eds. Chawla & Renesch. *Learning Organisations*, Productivity Press, 1995, Portland, Oregon, USA.
- Gilbert, J. *Catching the Knowledge Wave*. NZCER Press, 2005, Wellington.
- Senge, P M. *The Fifth Discipline*, Random House Australia, 1992, Sydney, NSW, Australia.
- Steele, E. *The Mentoring Handbook*, Two Cats Publishing Ltd, 2003, Wellington.
- Whitmore, J. *Coaching for Performance*, Nicholas Brealey Publishing, 1996, London.
- Rosier, P. *Workwise*, Canterbury University Press, 2001, Christchurch.

### **Evaluation utilization**

Sankar Ramasamy from the Ministry of Social Development has provided the following link to a very comprehensive bibliography of useful references on the utilization of evaluation – go to <http://kuuc.chair.ulaval.ca/english/pdf/bibliographie/evaluations.pdf>. Thanks to Sankar.

### **How to build evaluation associations and networks: Learning from the pioneers**

This chapter, in a recently published book from the IOCE (International Organisation for Cooperation in Evaluation) entitled *Creating and developing evaluation organizations: Lessons learned from Africa, Americas, Asia, Australasia and Europe*, has some excellent guidance for anzea as we establish ourselves. This book represents the collective efforts of many people from many countries, regions and cultures. It was possible thank to 37 authors who documented the knowledge on Country-Led Evaluation Capacity Development generated all over the world in the last 5-10 years. The core of the book is 14 case studies of evaluation organisations, including information about their creation and operation, as well as a description of their major challenges, solutions, lessons learned, and recommendations for successful association development. In addition, there are papers on evaluation capacity development, plus some perspectives from other evaluation organisations. The book is available for free download at [http://www.ioce.net/resources/case\\_studies.shtml](http://www.ioce.net/resources/case_studies.shtml)

### **IOCE website**

The IOCE website is a valuable resource. **anzea** is now listed there, including news on our development and the July Conference! Check out news on professional evaluation activity all over the world at [internationalevaluation.com/news/index.shtml](http://internationalevaluation.com/news/index.shtml). It's fascinating just looking at where evaluation associations are being set up, including Salvador, Argentina, Niger, Barbados, and the World Bank. It also has a growing resources section – you can find international evaluation job opportunities here!



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**New evaluator resource: *Proving It***

*Proving It* is a unique web-based monitoring and evaluation resource for economic development practitioners, councils, tourism authorities, i-Site centres and council controlled organizations. It has been developed by the Economic Development Association of New Zealand with significant input from Local Government New Zealand, the Ministry of Economic Development and Statistics New Zealand.

*Proving It* provides practitioners with:

- A link to all relevant regional and local statistics held by Statistics New Zealand
- A logic frame for linking inputs, outputs, impacts and outcomes when planning and monitoring
- A number of tools for analyzing and prioritizing potential interventions i.e. cost benefit analysis
- A number of tools for engaging and planning with the community
- Advice on using qualitative and quantitative indicators
- A link to all relevant quantitative indicators available at local and regional levels

In essence, *Proving It* is an evidence based framework for planning and monitoring economic growth that will enable practitioners to prove the value of their interventions to stakeholders and community. The intellectual framework of the resource has been based on good practice throughout the United Kingdom, Canada and Europe. The tools have been taken from reputable organizations such as the World Bank, European Union and the International Development Agency, to name but a few.

*Proving It* is live, interactive and evolving so that we can grow and add value to the site over time. The resource can be accessed here: [www.provingit.org.nz](http://www.provingit.org.nz)

Regional launches of the site will commence in April/May 2007. The roll out of the site will include a series of workshops where potential users will be introduced to some of the more cutting edge ideas and tools within it. We encourage you to support the resource when it is launched within your region. Advice on dates/times/venues of the launches will be provided soon.

Bevan Graham  
Chief Executive  
Economic Development Association of New Zealand

**New Report on Instruments Used to Evaluate Assisted Living Facilities**

A new report, Environmental Scan of Instruments to Inform Consumer Choice in Assisted Living Facilities, is now available on the AHRQ Web site <http://www.ahrq.gov>

The report presents an overview of assisted living, describes the ways that assisted living facilities are evaluated, and reviews the tools currently available to evaluate assisted living facilities and services, including consumer-reported instruments, expert observational instruments, and provider-reported tools. The instruments reviewed for this report were used in an array of assisted living settings and other long-term care facilities, such as nursing homes and residential settings. The instruments are being used to evaluate services offered in a particular facility, the physical and cultural environment, staff issues, activities, social support, and contractual issues. Lastly, the report describes the gaps in



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the instruments currently available—that is, important aspects of facility performance from the perspective of consumers and other stakeholders that are not being addressed. This report was prepared for AHRQ by Westat, Inc.

### **Talanoa Pasifika – Kōrero Patipika**

As part of **anzea**'s Pacific strategy to support and strengthen Pacific research networks we will be bringing our membership news and activities about Pacific research and Pacific researchers. The University of Auckland, Faculty of Medical and Health Sciences is seeking registrations to their upcoming School of Population Health Pacific Health Research Symposium on 11 May, 2007

2007 PACIFIC HEALTH RESEARCH SYMPOSIUM  
Profiling Pacific Research  
FRIDAY 11 MAY 2007 9 AM – 4 PM  
BLDG 730 TAMAKI CAMPUS,  
261 MORRIN ROAD GLEN INNES AUCKLAND

For further information, please contact:  
Ofa Dewes  
Pacific Health  
School of Population Health  
Faculty of Medical & Health Sciences  
The University of Auckland

Email: [o.dewes@auckland.ac.nz](mailto:o.dewes@auckland.ac.nz)  
Phone: 3737599 extn 89354 or 021-627742.

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## **Get involved!**

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A core value of **anzea**'s establishment is member participation – this means we want to have you actively involved in developing the kinds of services evaluation practitioners need. If you would like to become involved – either in a particular development or in general – get in touch with any member of the Board.

Right now we are keen to have people involved in the following:

- *Newsletter contributions from members* – useful resources, notice of relevant events, short articles, or a guest editorial – contact Karen Johns 021 555956
- *Regional membership* – contact Rachael Trotman 09 8183531
- *Māori evaluation development* – contact Laurie Porima 06 3673655
- *Setting up a Wellington branch* – contact Anne Dowden (04 4626405) or Kate McKegg (07 8701665)
- *Setting up other regional branches* – contact Jacqui Henry 07 8382569



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## Classified

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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, Karen Johns [karen.johns@xtra.co.nz](mailto:karen.johns@xtra.co.nz)

### **Webscribe Ltd provides transcription services for researchers**

Webscribe will transcribe cassettes or digital files. Please call Megan Fidler on 027 3430695 or email [megan@webscribe.co.nz](mailto:megan@webscribe.co.nz)

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## Members' forum

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**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.

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## How to join anzea

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Membership in **anzea** is open to anyone with an interest in evaluation – there are no other eligibility criteria (why would we need any....). The fee is just \$55 per annum and only \$35 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.)



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Auckland  
info@anzea.org.nz

## anzea membership form 2006-2008

### 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 \$55  
 Student/unwaged member\* \$35

\*Requires evidence of either (1) full-time current student status as an accredited academic institution (please enclose photocopy of current enrolment confirmation), or (2) unwaged status.

- I wish to make an additional payment of \$45 to receive a special edition **anzea** Founding Member Certificate.

- Total enclosed \$\_\_\_\_\_ (Please make cheques payable to **anzea**)  
 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]

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

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

**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.

**CURRENT PRIMARY EMPLOYMENT:**

Position:

Organisation:

**TRAINING AND QUALIFICATIONS**

**GENDER:**  Female  Male  Other

**AGE:**  18-25  26-35  36-45  46-55  Over

**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:

## PROPOSAL FOR CONTRIBUTION TO THE ANZEA CONFERENCE 2007

<b>Presenter details</b>	
Name/s	
Organisation	
Role	
Email address	Phone/s
Postal address	
Format of contribution (tick one)	Time required (45 or 90 mins)
<input type="checkbox"/> Workshop	
<input type="checkbox"/> Seminar	
<input type="checkbox"/> Group discussion	
<input type="checkbox"/> Panel discussion	
<input type="checkbox"/> Paper presentation	
<input type="checkbox"/> Poster presentation	
<input type="checkbox"/> Other (describe)	

**Abstract (max 200 words)** - (Write in this space or on an attached page; include a presentation title)

### ***Equipment available***

Note – in the low-cost spirit of the conference, the only equipment available will be: overhead projector, video player, whiteboards, flip charts, pens, and blutac. Please highlight any items in the foregoing list that you will need. If you need data show, please advise.

To enhance record-keeping, we can digitally photograph whiteboard notes and flipchart text and diagrams for later reference.

Send to: [info@anzea.org.nz](mailto:info@anzea.org.nz) attention Pam Oliver.