



He kura te tangata

aotearoa new zealand evaluation association

www.anzea.org.nz

0800 EVALUATE (0800 382582)

NEWSLETTER September 2007

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Convenor's kōrero

Kia ora tātou

The last few months have been very productive for **anzea** – our second AGM, the Inaugural **anzea** Conference, another Board meeting, meetings with the AES, the launch of **anzea**'s Professional Indemnity Insurance Scheme, a very useful member survey, and the hui for Māori evaluators to input into SPEaR's Best Practice Guidelines.

The big buzz was the Conference! Attendance exceeded our expectations, with more than 130 delegates including a strong representation from public, private and NGO sectors, and a great bicultural and multicultural flavour to the whole event. And in addition to the intellectual stimulation, on the entertainment front the laconic Pinky Agnew well and truly took the mickey out of evaluators and **anzea** alike; those who braved the Wairarapa chill to take part in the wine challenge came away knowing a bit more about wine and a lot more about how to impress your friends with the jargon of viticulture; and the happy hours each evening were the best party I've been to in ages (though maybe I don't get out enough....).

anzea celebrated its first birthday with the AGM following the Conference poroporoaki. At the end of June we were still comfortably 'in the black' financially, and our membership stood at 180 – a big thanks to all of you who have demonstrated your faith in the Association by re-subscribing already.

We made a small profit from the Conference, and at the October Board meeting we'll be discussing best uses of those funds over the next year, taking into account the feedback that you provided in the member survey about your priorities – over the next few months we'll be in touch with you about new **anzea** projects.

And the best news of all – earlier and extended daylight saving! I hope you all have a great summer.

Ngā mihi, na
Pam

Inaugural anzea Conference 2007

A fantastically successful Inaugural **anzea** Conference was held in Masterton in early July, with more than 130 people attending the Conference and more than 60 attending pre-conference workshops. Based on the conference evaluation and feedback from delegates, the highlights of the Conference were:

- The friendly and inclusive wairua of the Conference
- The bicultural focus of the whole Conference
- Keynote speakers, especially Patricia Rogers
- Having both international and tangata whenua keynotes
- A good range and mix of speakers and workshops
- The kaupapa Māori sessions
- Practical sessions focusing on methods and tools
- Meeting other evaluators – networking and the diversity of participants
- Sharing of resources by presenters and others
- The choice of venue and the food
- The excellent organisation of the Conference.

'All three keynote speakers were very inspirational.'

'I liked the comfortable atmosphere and general willingness to share experience.'

'Loved the bicultural /Pacific component in attendees and presentations.'

'Connections to people working in similar fields with similar goals and to people who are doing very different things that I could learn from.'

'The venue – size and comfort for the number of people at the conference was perfect – it was easy to mix with everyone else including the keynote speakers (and the food was excellent).'

'The careful attention to all the details that make a great conference – the venue, speakers, inclusiveness and friendliness.'

You can check out photo highlights of the Conference on the **anzea** website (anzea.org.nz) in early October. Thanks to support from several corporate and government sponsors, we were able to provide full scholarships for 16 people to attend – in particular Māori, Pacific, students, unwaged and NGO representatives who would not have otherwise been able to come, and whose contributions enriched the Conference in many ways. Special thanks go to Michele Lennan and **anzea** Administrator Jackie Pivach, and to the Solway Copthorne's Conferences Manager, Jacqui Hoar, whose combined efforts ensured that the organisation of the Conference went so smoothly. Delegates also provided their thoughts on topics for the 2008 Conference, which is in its planning stages now with a Committee based in Wellington.

The Conference Proceedings will be available soon on the **anzea** website – we'll let you know when they're online.

Hui to develop Best Practice Guidelines for Evaluation with Māori

Alongside the Inaugural **anzea** Conference in Masterton, a one-day hui was held for Māori evaluation practitioners, with a specific focus on obtaining their input into the development of SPEaR's Best Practice Guidelines for evaluation with tangata whenua. **anzea** was contracted by SPEaR to undertake this hui, which was scheduled immediately before the conference to enhance attendance. In consultation with **anzea**'s Māori Board members, a different approach and process was utilised to contribute to the ongoing development of the guidelines, in particular to broaden the range/breadth of Māori contributing to the development of the guidelines. A more participatory approach centres on the notion of creating a shared understanding and was consistent with tikanga Māori principles of whanaungatanga and mana. The involvement of community and hapū/iwi representatives was seen as imperative for ensuring that the practice guidelines take account of, and draw on, the reality of Māori provider and whānau experience. It was also seen as important that community and iwi/Māori provider organisations be able to speak for themselves, giving voice to their own experience and concerns, rather than their input being put forward by researchers and evaluators, albeit Māori. One output of the hui will be the writing up of a number of vignettes describing 'best practice' in tikanga Māori research and evaluation that were provided at the hui.

The hui was considered extremely useful by the 25 people who attended, not only as a vehicle for providing input on effective practice in Māori evaluation to the Ministry of Social Development through SPEaR, but also as a major opportunity for Māori working in evaluation and related work to come together and discuss issues for Māori in contemporary evaluation practice. Particular thanks go to those who were involved in organising and delivering the hui.

anzea Membership of the Royal Society of New Zealand

Earlier this year **anzea** applied to become a Constituent Organisation of the Royal Society of New Zealand, and our application has recently been accepted. The Royal Society is a federation of around 60 scientific and technological societies and associations, and individual members. As an independent, national academy of sciences, its work is to "promote awareness of science and technology in schools, in industry and in society". It administers a number of funds for science and technology, publishes eight journals, offers science advice to government, and fosters international scientific contact and co-operation. Membership of the Royal Society is important for **anzea** as it provides the Association with links to other professional bodies nationally and internationally, recognition as the professional body representing the evaluation profession in Aotearoa, listing on the RSNZ website, and the support of the Royal Society in a range of ways. It also entitles **anzea** to participate in the decision-making of the Royal Society through its electoral colleges. If you'd like more information about the work of the Royal Society, go to www.rsnz.org.

www.anzea.org.nz

Over the next couple of months, a website development plan will be constructed for **anzea** by Manu Caddie (evaluator and website designer, based in Te Tairāwhiti). Manu will be interviewing members of the Board, Branch Convenors, the newsletter editor, tangata whenua members and ICT specialists within the current membership as part of the scoping process. A comprehensive draft plan for the **anzea** website will be produced that takes into account the needs of members across the regions, the Board, Branch Committees and administrators who will be responsible for maintaining the website. The terms of reference require the plan to include systems and structures that are effective, low cost and easy to maintain. Manu's keen to get thoughts and suggestions from **anzea** members as to what you would like to be able to have and do with the **anzea** website – so please, **email your website ideas** to Manu at manu@ahi.co.nz or call him on 0274 202957.

anzea Professional Indemnity Insurance Scheme

We are pleased to announce the launch of the **anzea** members' Professional Indemnity Insurance Scheme. Based on feedback from **anzea** members confirming the need for such a scheme, we have negotiated with brokers Mooney & Associates, and secured what we believe are well-priced insurance options, which are available immediately. Fees and terms of the insurance and the application form have already been sent out to **anzea** members, but you can also get them by emailing info@anzea.org.nz. We'll have this information available on the website shortly.

If you would like to discuss the terms or coverage, you are very welcome to call Bev Rowe at Mooney and Associates on 09 3774314.

anzea Member Survey

Almost half of **anzea**'s members responded to the member survey that we circulated earlier this year – a big thanks for all the useful suggestions and feedback you provided. Your suggestions for professional development events have been provided to all **anzea** Branch Committees and the **anzea** Board members holding the professional development portfolio. In particular, your input has been very valuable for the Board's current work to construct a three-year strategy for **anzea**, as well as clarifying strong member support for current initiatives in the concept stages – a mentor training and brokerage service for members; a voluntary peer review process for evaluation practitioners; and the development of a Code of Practice for evaluation with tangata whenua. Other key findings from the survey are summarised in the following excerpts from the survey report (already sent to members):

*“Key roles for **anzea** were considered to be supporting networking, providing events, providing on-line resources, supporting evaluation education and training, peer support and advocacy. There were no discernible patterns of response according to the various regions that respondents work in or the type of work that they do.*

The greatest professional education demands at branch level appear to be for evaluation tools and techniques and building capacity and training. This list can be presented and discussed at branch meetings, to support decisions on what activities to provide locally. (Again) there were no discernible patterns of response according to the various regions that respondents work in or the type of work that they do.”

Thanks to the members who congratulated **anzea** for its achievements to date – it's good to hear that we're on the right track.

anzea Membership

Paid up **anzea** membership stands at **113** as of 10 September 2007. Note that a further 57 people have still to renew for 2007/2008; if all of these people renewed the membership total would stand at **170**. If you are one of these 57 who have left renewing **anzea** membership off your list so far please seize the day!

Characteristics of membership

These figures relate to the 113 paid up members.

Gender: 86 (76%) are women and 27 (24%) are men.

Ethnicity: 6 paid up members provide iwi affiliations, 1 Australian Aboriginal, 1 Indian of Bengali descent, the rest unstated (mainly Pākehā).

| Location | No. Sept 07 | No. March 07 | No. Nov 06 |
|------------------------|-------------|--------------|------------|
| Northland | 1 | 1 | 1 |
| *Auckland | 36 | 43 | 39 |
| *Waikato/Bay of Plenty | 9 | 14 | 6 |
| Mid North Island | 3 | 5 | 2 |
| *Wellington | 47 | 33 | 19 |
| *Upper South Island | 14 | 3 | 1 |
| Lower South Island | 2 | 1 | 1 |
| International (Hawaii) | 1 | 1 | 0 |
| Total | 113 | 101 | 69 |

* Current branches

Since last November, greatest membership growth has occurred in Wellington, followed by the Upper South Island.

Profession

| Type | No. Sept 07 | No. March 07 | No. Nov 06 |
|--------------------------------|-------------|--------------|------------|
| Central government | 33 | 31 | 27 |
| Crown Research Institute | 6 | 3 | |
| Local government | 1 | 3 | 1 |
| Independent consultant | 34 | 22 | 19 |
| Private research org | 16 | 22 | 14 |
| Academic (incl research units) | 12 | 14 | 4 |
| NGO | 11 | 6 | 4 |
| Total | 113 | 101 | 69 |

Summary

The current profile of the **anzea** membership is predominantly women, Pākehā, mostly Auckland or Wellington based, generally central government staff or independent or private researchers/evaluators.

Guest editorial

“The state of evaluation in New Zealand” Paul Duignan

How is evaluation in Aotearoa tracking? In my view, it's in good shape and there are a few things I particularly want to celebrate, but there are also a few issues we need to get serious about in the coming years. Firstly, on the positive side, the perspectives and approaches put forward by Maori evaluators in this country have cleared a space in which much innovative work has taken place. The second thing I've noticed recently is an increasing number of evaluators who can just jump right into an evaluation with clear frameworks and approaches and quickly get on with the job. While some evaluators have always been able to do this, there was a time when many evaluators were new to the field and spent a lot of time floundering around working out how to approach an evaluation project. It's great to see the increasing professionalism of evaluation in New Zealand.

Thirdly, in regard to the types of methodologies we use, we should be proud of the work that has been done particularly using formative and process evaluation approaches. Usually these types of approach are the most feasible and affordable for us to use because of the scale and resources available for evaluating projects here. However, the first issue I think we need to think about for the future is the question of our ability to deal with the continuing, often unrealistic, push for outcome evaluation. We may not like it but, in my view, we need to get beyond just moaning and groaning about it. The demand for evidence-based practice and policy, quantitative meta-analyses etc is likely to continue and it means that New Zealand evaluators need to get up to speed with quantitative outcome evaluation designs. Often what is needed is the ability to understand which of these designs should be considered and the ability to work out whether or not they're appropriate, feasible or affordable. Often they are none of these things – but I think if you're a professional evaluator, increasingly you're going to have to either understand these designs sufficiently to know when they could be used, or have someone you can call on to provide such advice. My own feeling is that high-level stakeholders grossly overestimate the feasibility and affordability of such designs. It's only when evaluators can provide a coherent analysis of

which designs are, and are not, feasible and feed this up the decision-making hierarchy that we will bring these expectations into line with reality. But to do this New Zealand evaluators need to increase our understanding of such designs or have people we can call upon who are familiar with such designs. This is something I think some of us still need to work on.

Ultimately I see the optimal pattern for evaluation in New Zealand being lots of formative evaluation (until we're happy that most programmes are being really well designed and implemented, which, given the pressures to get public sector programmes up and running almost instantly, we will not see soon); a low level of process evaluation for most projects so we can share good practice across programmes; some intensive process evaluation where we really need to describe what's happening in detail (for example with really innovative projects); and very, very selective use of well constructed outcome evaluation – which will tend to be very expensive. I would like to do away with most of what I call 'pseudo-outcome evaluation studies' - ones which really are just vague, hand-waving justifications for a project. We should reserve our outcome evaluation resources for a few crunchy outcome evaluation studies, which really can tell us something about how to get the outcomes we want. But this requires high level stakeholders having the evaluation sophistication to realise that usually we will not be able to tell them anything about outcome attribution – we may be able to tell them that not-necessarily attributable outcome indicators have improved, but we will not be able to prove that the observed changes were actually caused by the programmes they are sponsoring. As evaluators we share the responsibility to get the message out that this is just a somewhat unfortunate fact of life which is missed by those who are naive about how much attribution is actually possible in evidence based practice.

The second area where I think we need to improve is much less to do with evaluators and more with the organisational structures in which we work. I think that the integrity of evaluation work needs to be better protected from the day to day political pressures within government departments. This is not a problem that occurs just with one administration; over the years I've seen it under all administrations. The problem is that public servants are obviously very sensitive to the political implications of any evaluation findings and it's sometimes difficult for evaluation findings and evaluators not to get caught up in the politics of whatever it is that is being evaluated. I suspect, but am keen to discuss the pros and cons further, that it might be time to pull most evaluation out of individual departments and put it somewhere independent, such as the Education Review Office, the Office of the Auditor General or an entirely separate new agency. The advantages would be that such a group would have independence, could develop a critical mass of evaluators and could, hopefully, take a more strategic overview of where it would be best for us to spend our scarce public sector evaluation resources. Of course, an immediate objection is that losing the close working relationships that evaluators within departments have with those implementing programmes would hinder formative evaluation within departments. I might be wrong, but I can imagine a situation where a group of formative evaluators who, while working for the 'Evaluation Authority' or whatever it was called, went back into departments and worked alongside programmes in a true 'critical friend' role. I think that this would give such formative evaluators much more power than they currently have to speak up when it is obvious that a programme is being implemented too hurriedly and thus jeopardising its chance of success. To really make it work I'd like to see the day where there is a legislative requirement for formal formative evaluation to be undertaken on every large new government project. Such 'assist' formative roles, if undertaken by an Evaluation Authority, would need to be clearly separated from the 'assess' work of measuring outcomes where possible which would also be undertaken by the Authority.

My third point is a broader one about evaluation practice in general, not just in New Zealand. I wonder if the time has come when we should be moving to more standardised approaches to our evaluation planning. Over the years I've written many evaluation plans and reports and read hundreds of them. The first twenty pages or so in any good report often covers the same ground – for instance, the relationship of evaluation to monitoring, the issue of

attribution of any changes in outcomes to particular players, formative, process, outcome/impact evaluation etc. While we need to provide scope for all of the creativity needed in approaching particular evaluation projects, I think that we should start thinking about standard formats for evaluation plans. I use a model for doing this (Systematic Outcomes Analysis and its user-friendly version, Easy Outcomes) but there may be a better model out there that could be developed. Of course, such a format needs to be able to somehow accommodate all of the different philosophies of evaluation which evaluators work with (I've recently discussed on my blog (outcomesblog.org) the challenges an approach like Systematic Outcomes Analysis needs to be able to address to order to achieve this).

One advantage of any good standard format is that it may help plan our evaluations more efficiently. There're relatively few evaluators in New Zealand and there are always likely to be too few to do the amount of evaluation work which is needed. Like the organisations and people we evaluate I think that we need to now be thinking smarter about the way we do evaluation if we're to provide value for money for those paying for our evaluations (usually the hardworking taxpayers of New Zealand). My recent work developing easier to use outcomes modelling software is one way I'll be trying to help make our evaluation practice more efficient.

Lastly, I want to conclude by encouraging what I call 'honest labelling' in evaluation. I think that there's too much of a 'fudge factor' in the way many evaluators communicate the evaluation questions they're answering in an evaluation report. Most stakeholders believe, or hope, that an evaluation will be answering the big outcome question – did the programme improve final outcomes? Often an appropriate, feasible and affordable methodology cannot be found to answer this question. If we are not answering the big outcome evaluation question we should put it right up there clearly at the start of our reports. If we don't do this we run the risk that stakeholders who only ever skim our reports will continue to go away with the impression that we are answering evaluation questions that are at a much higher level than the questions we are actually attempting to answer. Of course, we may get away with this for a while but in the end someone will point out (usually a peer reviewer of some sort) that we did not actually answer the high-level outcome evaluation questions everyone thought we were going to answer and at that point it is usually tears all around.

So, things are looking good for evaluation in NZ at the moment; **anzea** is thriving, we had a terrific 2007 conference, and there's plenty to keep us occupied in improving our evaluation practice over the next few years.

Board news

Board meeting July 2007

The **anzea** Board held its third meeting on the afternoon following the poroporoaki at the **anzea** Conference in July. Although this was a shorter meeting than usual, we managed to get through a full agenda, which included several important decisions. As a priority, the Board agreed to undertake a facilitated planning session on October 10 this year to construct a Strategic Plan for **anzea** to take us through the next three years to 2010. To date our planning has been, somewhat inevitably, a bit fragmented, as we have worked to set up essential infrastructure, Branches and key events both nationally and at Branch level. We hope to have a draft Strategic Plan available online for your input by the end of November.

Other Board work initiated or discussed at the July Board meeting included working towards trying to achieve charitable status for **anzea**, drafting a governance model for the Association, drafting a strategy for exploring strategic relationships between **anzea** and

other evaluation associations and related agencies, sharing activities regionally and nationally with the AES, and the potential for **anzea** involvement in developing an agenda for research on evaluation.

New Board portfolios

anzea's three new Board members are all making their mark. Melissa Weenink will be involved in organising the 2008 **anzea** Conference and **anzea** events in Wellington. Jane Carroll has taken over the Newsletter portfolio and editorship, and Heather Lees will be part of a group working on the development of a framework for evaluation practice standards in Aotearoa.

Collaboration with the AES

Representatives of the **anzea** Board have had further telephone conversations and two useful meetings with AES President, Rick Cummings, and other AES Board representatives in the past 2-3 months, including meetings in Wellington and at the AES Conference in Melbourne. We have agreed that we are keen to collaborate in the development of a Code of Practice, or practice standards, for evaluation with indigenous peoples, as well as exploring opportunities to jointly offer professional development events, both for national and regional **anzea** events, and to 'share' speakers at our respective conferences.

Auckland Branch news

Recent branch events

“Would you like the good new first or ...?”

Seminar provided by Pam Oliver in March 2007.

The write up of this workshop will be available in the **anzea** Conference Proceedings – go to **anzea** website in October.

Appreciative Inquiry – its place in evaluation

Seminar presented by Mike Hollings on 17 May

Mike Hollings is the Chief Executive of the Correspondence School with more than 30 years of experience in the education sector, from chalk-face through to management and review. He started his career with teaching in both primary and secondary schools. He also worked in the tertiary sector, establishing a graduate diploma in Bilingual Education. He has been in Senior Management positions in a number of government agencies, such as Te Puni Kokiri, Ministry of Education, Education Review Office, State Services Commission and The Māori Broadcasting Authority.

These high-level positions did not make Mike's presentation high browed or stuffy. He was approachable and, dare I say, funny. He firstly outlined the basics of 'Appreciative Inquiry' providing useful references to those of us in the audience who needed a bit of an update. The half-full glass comparison assisted even the least knowledgeable of us to get the gist of what this framework or principle is about. The value of exploring what the best is in individuals and organizations can be the easiest way to describe this. Mike has also explained the principles and phases of the Appreciative Inquiry Model.

It was very exciting to hear the experiences and impact of the actual process carried out at the Correspondence School, using the Appreciative Inquiry framework. The importance of the affirmative topic choice for the inquiry was pointed out as the key focus of the project.

Scoping the project and selecting and training the Advisory Group seemed to be significant building blocks of the process. The methods of the so-called '4-D cycle' (Discovery, Dreaming, Design and Destiny) was creative and well planned, however, the length of time to achieve the outcomes appeared to be significant.

In closing, Mike made comparisons of Appreciative Inquiry and evaluation, and pointed out the ongoing learning-oriented nature of this process. I feel that using creativity and positivity for future creation can enhance both our work as evaluators as well as the organizations and programmes we encounter.

Spreading the good word: Increasing the value of evaluation

In June, *Steve Tracey and Jane Carroll, Education Review Office* presented a seminar on the Education Review Office's (ERO) work in 'spreading the good word' on evaluation. Their presentation touched upon the background of ERO and the approach used in applying evaluation as a change process.

The evolution of the evaluation approach taken by ERO, from the time ERO was established in 1989 up until now, has moved from a focus on accountability and compliance to that of promoting best practice and improvement. Increasingly education reviews have focused on participatory approaches and internal evaluation. The challenge continues to be around breaking the perception, even an underlying fear or an "evaluation anxiety", around evaluation as "audit". Part of the issue is addressed through the process of building rapport and relationship with the evaluands or the schools. The other part is through what the schools gain through the reviews. Schools are shifting towards an application of evaluation and recognizing the value of evaluation in their internal review processes.

The point of greatest advantage, the presentation highlighted, is to tap into the combined outcomes of internal and external evaluation. That is where the value of evaluation in promoting improvement lies.

Following, with rigour, a manual of standard procedures, a code of ethical conduct, a framework of reviews for schools and early childhood centres are some of the means of achieving quality outcomes and establishing credibility of the work done by ERO.

Rina Tagore

Evaluation experiences - understanding change and sustainability

Seminar provided by Dr. Lesley Stone, Environmental Coordinator, The University of Auckland (UoA), in August 2007

Lesley Stone presented a description of a work-in-progress at the University of Auckland (UoA). In describing the exciting and promising UoA environmental sustainability programme, Lesley used the results of the environmental pilot projects as illustrations of furthering our understanding of how change can occur.

UoA is introducing a range of measures to assist it to work towards achieving the goals of its Environmental Policy. That is, to achieve sustainability through:

- Teaching and research
- Operations and
- Community partnerships.

Lesley's role as Environmental Coordinator has an operational focus and she is charged with overseeing the implementation and evaluation of the initiatives.

Lesley described the iterative model that was being used to roll out the initiatives, which included the steps of:

1. Understanding the organizational context: listen to stakeholders
2. Customising the programme accordingly
3. Focusing on priority
4. Conducting assessments
5. Actioning outcomes and measuring results
6. Reassessing progress

The overall aim of these steps was to work towards achieving environmental excellence in the University.

Lesley described each step in more detail, in terms of how they relate to the environmental sustainability programme on the Auckland and Tamaki campuses. Highlights included:

Step 1: Organisational context

Auckland University consumes a massive amount of resources. For example, each year it uses the same amount of electricity as the equivalent of the whole Auckland region having its lights on all day, every day! It also consumes 3 bath loads per minute of water; 23 times the height of the Sky tower in paper; the number of wheelie bins used each year would go all the way to the airport and back; and 36 million kms of air travel are made each year.

Step 2: Customizing the programme

Based on these figures, it was decided to implement the Environmental Policy with a focus on resources use, waste production and emissions.

Corresponding objectives and programme elements included providing:

- Leadership and support
- Commitment and involvement
- Recognition and reward of achievement.

An important component of the programme was to work with IT management and Dell computers.

Step 3: Priorities

Several pilot projects have been implemented on both campuses including:

- Recycling trial in the Auckland Quad (ongoing)
- Office pilots during Semester 1 2007 (11-12 building on city campus; all of Tamaki:10% of all UoA buildings)
- Computer lab pilots

Audits were conducted before during and after each pilot. Strategies to support each pilot included prompts for the use of recycling bins and shifting their locations and setting up websites to support and provide feedback to the office projects.

The results to date indicate that UoA has a culture where people want to be part of improving their environment (80-90% of respondents were supportive of this statement: n=236). There was a 10% reduction in electricity use on the Tamaki campus over the trial period, for example; and a 10% reduction in waste in the recycling trial. These reductions were achieved with a minimal amount of intervention: one implication of the projects so far is that if you have a motivated and aware audience, only basic interventions are required, such as prompting and feedback on progress.

Other key findings included:

- Improvements are best when:
 - The Head of Department (HoD) and staff are briefed (i.e. attend meetings)
 - HoD is supportive
 - The initial area of staff interest correspond with the programme (e.g. recycling)
- Improvements were least when:
 - There was a small group of staff involved

- The Department included in the pilot was co-opted without discussion
- Staff had no real interest in the programme area.

Lesley identified catalysts for the success of the programme so far: the contribution of computing in terms of providing 'instant' feedback and monitoring; the opportunity to involve students; the exploration of preventive options; and the involvement of a very motivated post-grad student.

The next stage of the programme is a possible roll-out across the University. The programme highlights, however, the dearth of research that takes place on the University itself, as an indicator of social change!

Jo Adams

Forthcoming Auckland Branch events

October

Date: 18 October 2007, 5.30 pm

Topic: **Evaluation in developing countries - A panel discussion**

Panellists: Nancy Sheehan, Eve Coxon and Karen Johns

This is a panel discussion on issues relevant to evaluation within a developing country context. The three members of the panel are evaluators who have years of experience in this context that span the education, private sector, civil society and environmental sectors.

Nancy Sheehan is the Principal Consultant of Nancy Sheehan & Associates she is experienced in development sector work predominantly in Private Sector Development and NGO capacity building in the Pacific Region. Nancy will provide some insights on current issues in development evaluation internationally and specifically in the Pacific Region.

Eve Coxon is a Senior Lecturer in Development Studies and Pacific Studies at the University of Auckland. Eve has been involved for many years in the delivery of aid to 'developing' country education systems through a wide range of projects and for a number of agencies. Eve will share her experiences of aid-funded educational activities with reference to strategies for evaluating project effectiveness and development impact.

Karen Johns is working as part of a team based at Auckland University, which is supporting Pacific Countries to manage their invasive species. Karen will talk about two rat eradication projects in Fiji and the monitoring and evaluation processes associated with them.

Date and time: Thursday 18 October 2007, 5.30 pm

Venue: Phoenix Research, 8 Normanby Road, Mt. Eden

Cost: Free - Drinks and snacks will be provided, and you are very welcome to stay on for more informal conversation afterwards.

RSVP: rina@tagores.com

Rina Tagore, **anzea** Auckland Branch, Events coordinator

Waikato Branch news

Over the past few months the Waikato/Bay of Plenty branch has been relatively quiet with no events scheduled. Two of the committee members attended the **anzea** conference in July, which was a great chance to hear some interesting presentations, re-establish connections and form new friendships. Up and coming events for the committee include the AGM, a

presentation by Pam Oliver and the Xmas party where we hope to see all our members get together.

Christchurch/Upper South Island Branch news

We have had a productive 2007. We formed our committee on 28 March, 2008 with Will Allen as Chair, Libby Gawith as Secretary and Pam Glover as Treasurer. We have met a number of times since then to organise events and develop our group. We organised one local night with the topic of "Dealing with the short and curlies: Ethical dilemmas in our daily work" on Friday 22 June, which drew a wider audience than usual and was a useful networking night.

One of the highlights of the year was the dinner out with David Fetterman, an American professor and lecturer in empowerment evaluation principles. A delightful and humble man to spend an evening with and generous with his wisdom and insights. We were lucky to join up with him in Christchurch as he was here to work with the Education Review Office earlier in the day.

We also had a guest speaker from Canada, Marie Gervais, an evaluation specialist and professor from Laval University in Quebec who also came and dined with us one Sunday night on 26 August. Again this was a delightful and inspiring evening.

We had plenty of positive feedback from members who attended the Masterton conference as well.

We are due to meet as a committee in mid September to plan the rest of 2007. We are looking forward to more exciting events in the upper south island branch for late 2007 and early 2008.

Libby Gawith

Wellington Branch developments

In April this year Wellington/Lower North Island region **anzea** members were sent a short email survey canvassing their preferences around establishing an **anzea** branch for the region. Ten of the (then) 37 members surveyed replied, including equal numbers of public sector and private sector members. There was a clear wish from the majority of respondents for some kind of local **anzea** activity along the lines occurring in other **anzea** branches. Respondents wanted **anzea** (at least in Wellington) to be collaborating with WEG/AES in order to avoid duplication of effort and activities. Members were seeking support from a local **anzea** branch that includes professional development events, get-togethers, networking, local representation to the **anzea** Board, and **anzea** events or initiatives similar to those provided currently in other regions. In July there was a gathering of Wellington/Lower North Island region **anzea** members at the Inaugural **anzea** Conference 2007 in Masterton, attended by around 30 people. Options for supporting local **anzea** members were discussed, and some action points agreed. Following this, in late July, **anzea** Board members met with Rick Cummings (President, AES) to further the relationships between **anzea** and AES. Options for collaboration in the Wellington/Lower North Island and elsewhere were one of the topics for discussion. The Board is currently in the process of

sorting out arrangements with the AES to share events in the Wellington region, and will be in touch with Wellington members later this year about options.

anzea Board contact list

| Name | Phone/s | Email |
|------------------|---------------------------|------------------------------------------------------------------------------------|
| Jo Adams | 09 3727212 0272 424589 | joadams@xtra.co.nz |
| Will Allen | 03 3219600 | allenw@landcareresearch.co.nz |
| Jane Carroll | 09 3746434 | jane.carroll@ero.govt.nz |
| Anne Dowden | 027 5004405 | Anne.Dowden@researchnz.com |
| Jacqueline Henry | 07 8382569 | HenryJ@waikatodhb.govt.nz |
| Heather Lees | 09 583 1326 | HeatherL@etito.co.nz |
| Kate McKegg | 07 8701665 | kate.mckegg@xtra.co.nz |
| Pam Oliver | 09 3727749 | pamo@clear.net.nz |
| Laurie Porima | 06 3673655 | laurie.lynn@xtra.co.nz |
| Nancy Sheehan | 09 3606796 | nancysheehan@clear.net.nz |
| Rachael Trotman | 09 8183531 | rachael.trotman@xtra.co.nz |
| Melissa Weenink | 04 4638043 | melissa.weenink@minedu.govt.nz |
| Tania Wolfgramm | 021 389169 | tania.wolfgramm@xtra.co.nz |

Developing anzea services

Mentor training for evaluators

We have started discussions with a mentor training provider to develop a mentor training package for **anzea** members, based on models designed specifically for evaluation practitioners – more on that in the next Newsletter. If you have any thoughts that you want to offer on this concept, please email them to Pam Oliver via info@anzea.org.nz.

anzea Conference 2008

The dates for **anzea**'s 2008 Conference have been set tentatively (but unlikely to change) for July 14-16 next year, with pre-conference workshops on July 12-13 – put these dates in your diaries now. There will be an announcement of the dates, theme and venue before Christmas, and a call for contributions early in 2008.

Resources, conferences, journals

Resources for Evaluation and Social Research Methods

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

This site links to on line books, manuals and guides about evaluation and social research methods, such as surveys, observations, and others. There are also links to sites about data quality, statistical analysis, presenting statistical analysis, and free software such as

statistical, office suites, spreadsheets and more.

Reference to this resource was provided by Gene Shackman, PhD, The Global Social Change Research Project, <http://gsociology.icaap.org>

Improving the Professionalism of Evaluation

Report prepared for the Centre of Excellence in Evaluation
Treasury Board of Canada Secretariat

T. K. Gussman Associates Inc., 31 May 2005

This paper considers developments and trends in programme evaluation against the context of evolving public service management. Expenditure review, new management frameworks and a need for greater public sector accountability have created challenges for Internal Audit and program evaluation in the federal sector. For programme evaluation, that challenge involves improving the image and credibility of the function and, ultimately, ensuring greater use of evaluations by senior management.

In parallel with improving utilisation would be the development of a system to ensure that individuals engaged in the practice of evaluation had sufficient skills and education to carry out the work to the established standards.

Some of the key findings of the study were that as management needs become more complex, critics point to a lack of consistency and methodological rigour within the evaluation function. Much of the criticism comes from within the evaluation community. A lack of standards has led to a situation where "evaluation" is conducted by a variety of individuals with a social science or statistics background. There is a consensus that action is required to create professional competency criteria for evaluators.

Evaluation involves the rigorous application of research methods, statistical methods, analytical techniques and listening skills. Also critical are sound judgment and effective communication skills. Because evaluation is not a profession, individuals who engage in the activity should demonstrate a certain skill set and the ability to identify and apply the appropriate tool(s) to any specific situation.

It is almost impossible to regulate entry to the field. At the same time, it is highly important that there be standards to which "evaluators" can be held. While there is overall agreement on such standards for evaluation, the debate over if and how those standards could be enforced has taken close to two decades -- without resolution.

Licensing and certification of individuals involve arduous processes and appear to raise the spectre of potential legal challenges. "Credentialing" is a looser form of certification and this approach leads into the identification of core competencies.

A reasonable solution appears to come through the growth of university-based programmes offering a certificate in evaluation. The path of least resistance in finding a solution would be to arrange for partnership agreements between the federal government and such institutions. Identified universities in all regions of the country could be accredited to train entry-level evaluators and to test their students to ensure that they demonstrate the key competencies for an evaluator. An initial step would be to reconcile the TBS profiles with those recommended in the recent academic evaluation literature. There would be no direct enforcement on the part of the federal government, but the use of such programs could be encouraged through the terms and conditions of contracting (such as through mandatory requirements in a request for proposals).

The accreditation of post-secondary institutions to train students to ensure that they meet the core competency test would support the effort to separate evaluation units in the federal government from their co-mingling with audit units. With separately defined criteria and standards for evaluators and auditors there would be less reason to continue such administrative arrangements. Separate management can be justified by the presence of professional standards and training needs and how these relate to accountability. This would help to enforce the evaluation identity and justifying the function as an important and powerful management tool.

The full report can be accessed at:

http://www.tbs-sct.gc.ca/eval/dev/Professionalism/profession_e.asp

A think piece on communication – see link

“Those of us who manage written information therefore have a great challenge. How can we make what is written down more meaningful, more valuable? How can we make it “make more sense”? Here are ten principal ways to do so”.

<http://blogs.salon.com/0002007/categories/businessInnovation/2006/11/14.html#a1695>

Sociology conference

Sociologists amongst our members contemplating booking for the NZAIA conference on 29-30 November might note that on the following week is the:

TASA/SAANZ Joint Conference 2007, Auckland University, 4-7 December. Theme: Public Sociologies: Lessons and Trans-Tasman Comparisons. Keynote speakers: Professor Barry Smart (University of Portsmouth) and Professor Michael Burawoy (University of California, Berkeley). For more information please visit http://www.cce.auckland.ac.nz/conferences/index.cfm?S=CCE_JOINT

New Zealand Social Statistics Network Summer Programme 2008

The New Zealand Social Statistics Network is offering the following five-day short courses at the School of Government, Pipitea Campus, Victoria University of Wellington, 11th-22nd February 2008:

The NZSSN summer programme is designed to cater to fundamental, changing and emerging research strategies, and to serve a wide variety of needs for training and professional development within the academic, public and private sectors. Courses cater not only to researchers in the social and political sciences, but also those in areas such as the behavioural sciences, medical and health sciences, epidemiology, policy research, education, economics, law, management, marketing, public relations and human resource management.

INTRODUCTION TO STATISTICS (Introductory level)

11th - 15th February 2008

An introductory course in statistical techniques with an emphasis on those applicable to the social sciences, focusing on concepts rather than mathematics.

Dr Stephanie Budgett, Department of Statistics, The University of Auckland.

USING MIXED METHODS IN RESEARCH AND PROGRAM EVALUATION (Introductory level)

11th - 15th February 2008

An introductory course intended for current and emerging researchers who want to know more about using both qualitative and quantitative methods in their research activities.

Dr Delwyn Goodrick, Program Evaluation Consultant

Dr Gordon Emmerson, Victoria University of Technology, Australia.

DATA ANALYSIS IN SPSS (Introductory level)

18th - 22nd February 2008

This introductory course provides the beginner in quantitative data analysis with the basic requirements for analysis in an SPSS computing environment. It focuses on the analysis of survey, administrative and/or census data for analysis. Some basic knowledge of descriptive statistics, Introduction to Statistics, or equivalent experience presumed.

AP Brian Phillips, Director of Postgraduate Statistical Programs, Swinburne University of Technology.

INTERMEDIATE STATISTICS (Intermediate level)

18th - 22nd February 2008

This intermediate statistics course reviews the concepts of statistical inference from Introduction to Statistics and expands upon their application providing an introduction to the statistical computing package R. Furthermore the course covers models, assumptions and transformations, two-way analysis of variance, categorical data, regression, and time series analyses.

Dr Andrew Balemi, Department of Statistics, The University of Auckland.

MIXED METHODS: FROM ANALYSIS TO PUBLICATION (Intermediate level)

18th - 22nd February 2008

This is a five-day intermediate level workshop that focuses on the integration and presentation of data derived from mixed method studies. Good planning, execution and analysis are necessary components of mixed methods research. Many researchers can benefit from more advanced learning in the next important step: how to take the data and develop an integrative presentation where findings are clear and where the various elements combine to illuminate key claims.

Dr Delwyn Goodrick, Program Evaluation Consultant

Dr Gordon Emmerson, Victoria University of Technology, Australia.

FOR MORE INFORMATION AND/OR TO ENROL, PLEASE VISIT:

www.nzssn.org.nz OR CONTACT courses@nzssn.org.nz

Annette Herbert

NZSSN Course coordinator

Ph 021 565 841

Towards a new framework for evaluation systemic and participative methods

On 8 August 2007, Gerald Midgley (ESR) gave a plenary talk to the 51st Annual Conference of the International Society for the Systems Sciences (ISSS). He presented a new framework for evaluating systemic and participative methods.

Gerald argued that systems practitioners often make significant claims for the value of their methodologies and methods. However, when evidence is presented to support these claims, it is usually based solely on the practitioner's own reflections on single case studies. Less often, practitioners set up post-intervention debriefings with project participants using questionnaires. While the latter is an improvement on researcher reflections alone, there have been few attempts at systematically evaluating across methods and across case studies undertaken by different practitioners. This is understandable because, in any given local intervention, contextual factors, the skills of the practitioner and the purposes being pursued by stakeholders are inevitably going to affect the perceived success or failure of a method. The use of standard metrics and even qualitative criteria for comparison can therefore be made problematic by the need to consider what is unique in each intervention. So the following question needs to be asked: is it possible to develop a single evaluation

approach that can support both locally meaningful evaluations *and* longer-term comparisons between methods? Gerald's framework for the evaluation of methods seeks to do just this. Research on the framework and associated tools is in its infancy, but five initial trials suggest that it is promising.

However, comparing across methods will ultimately require the development of a longer-term international research program, and Gerald ended his presentation with a call for participants in this. If members of **anzea** are interested in finding out more about what participation in the international research programme might involve, a copy of the written paper associated with the talk can be obtained from gerald.midgley@esr.cri.nz

Knowledge and Social Service Provision Symposium

Knowledge and Social Service Provision

This symposium has been organised by the Social Sciences Advisory Committee of the Royal Society of New Zealand to be held on 18 October 2007 in the Auditorium, National Library of New Zealand Te Puna Mātauranga o Aotearoa.

Knowledge and Social Service Provision - designed to provide a comparison of the construction and use of knowledge in "Targeted" and "Strengths" based approaches to providing social services.

Programme

| | | | |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:45 am | Registrations (in Foyer) | 12:30 pm | Lunch |
| 8:30 am | Welcome /Powhiri Dr. Di McCurdy, CEO Royal Society of New Zealand | 1:20 pm | Healthy Housing Programme Dr Patricia Laing, Dr Janet Clinton - School of Population Health University of Auckland, Tracey Moore - Project Manager Housing New Zealand Corporation and Jude Woolston, Project Coordinator Counties Manukau District Health Board |
| 8:45 am | What Constitutes A Strengths Based Approach To Social Services Provision Professor Robyn Munford and Wheturangi Walsh, Massey University | 2:30 pm | Economic Framework Professor Caroline Saunders, Lincoln University |
| 9:50 am | Maori Longitudinal Health Studies Dr Chris Cunningham, Massey University | 3:35 pm | Presenter's Panel and Discussion |
| 11:00 am | Morning Tea | 4:20 pm | Closing Comments |
| 11:20am | Pacifika Longitudinal Health Studies Dr Janis Paterson, Auckland University | | |

Further information and registration details are available at <http://www.rsni.org/events/>



Get involved!

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

- *Joining the **anzea** 2008 Conference Committee* – contact Anne Dowden (04 4626405)
- *Building regional membership* – contact Rachael Trotman 09 8183531
- *Ideas for the **anzea** website* – contact Manu Caddie at manu@ahi.co.nz or 0274 202957

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



PROJECT MANAGEMENT

- PROOFREADING
- ADMIN SUPPORT

Contact **Jackie Pivach**
09 8339593 Mob 0274918200
servicesolutions@xtra.co.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.

How to join anzea

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 \$62 (inc GST) per annum and only \$40 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.)



aotearoa new zealand evaluation association

PO Box 106732

Auckland

0800 EVALUATE (0800 382582)

info@anzea.org.nz

www.anzea.org.nz

anzea membership form 2007-2008

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 \$62 (inc GST)
 Student member* \$40 (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> |
| <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> |
| <p>ETHNICITY/IES:</p> <p><input type="checkbox"/> NZ Maori <input type="checkbox"/> NZ European/Pakeha <input type="checkbox"/> Other European <input type="checkbox"/> Cook Island Maori <input type="checkbox"/> Samoan</p> <p><input type="checkbox"/> Tongan <input type="checkbox"/> Nuiean <input type="checkbox"/> Chinese <input type="checkbox"/> Indian <input type="checkbox"/> Other_____</p> | |
| <p>IWI OR TRIBAL AFFILIATIONS (WITHIN YOUR COUNTRY OF ORIGIN):</p> <p>N.B. This information is to help us identify members with specific cultural knowledge.</p> | |
| <p>MAIN PRACTICE INTERESTS</p> <p>SECTORS WORKED IN (LIST UP TO FIVE) – E.G. HEALTH, EDUCATION, LOCAL AUTHORITIES ETC.</p> <ul style="list-style-type: none"> • • • • • <p>AREAS OF EVALUATION EXPERTISE – E.G. METHODOLOGIES (INCLUDING CULTURALLY SPECIFIC, OR CROSS-CULTURAL APPROACHES), SUBJECT MATTER AREAS, ETC.</p> <ul style="list-style-type: none"> • • • • • <p>AREAS OF PARTICULAR INTEREST (IN ADDITION TO THE ABOVE)</p> <ul style="list-style-type: none"> • • • • | |

Office use only:

Date received:

Cheque banked:

Receipt number:

Confirmation sent: