

anzea Professional Practice and Development policy 2010-2012

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A. Purpose

Consistent with clause 4 of the **anzea** Constitution (see **Appendix 1**), the purpose of the Professional Practice and Development (PPD) policy is to:

- Advance professional practice and learning for **anzea** members, other evaluation practitioners and other affected by evaluation in Aotearoa New Zealand evaluators
- Promote the development of high quality evaluation practice in Aotearoa New Zealand (e.g. scope of evaluation practice; practitioner competencies and practice standards)
- To oversee and direct a strategy for advancing professional practice and learning based on member's needs
- To facilitate professional development opportunities for **anzea** members.

B. Policy

1. PPD portfolio responsibilities

Portfolio responsibilities are to:

- Develop and implement an **anzea** professional practice development and professional learning policy and strategy
- Facilitate professional practice development projects as approved by the Board, in liaison with other portfolios as relevant (see examples **Appendix 2**)
- Facilitate professional learning events in **anzea** regions, in liaison with the Branch Development Portfolio
- Facilitate professional learning events at the **anzea** Conferences, in liaison with the Conference Committees

- Compile an annual **anzea** Events Calendar (national and regional), in liaison with **anzea** Branches
- Ensure that PPD events notices are regularly updated on the **anzea** website and included in the **anzea** Newsletters, in liaison with the Communications portfolio.

2. Principles for the provision of professional practice development and learning opportunities

The following principles guide the provision of PPD opportunities (see examples in **Appendix 2**):

- All activities must align with **anzea**'s purposes as set out in the **anzea** Constitution.
- Professional learning opportunities provided to **anzea** members should be advertised to the broadest possible audience, as a way to promote good evaluation practice, and as an opportunity to recruit new members.
- Professional learning opportunities provided to **anzea** members must be affordable.
- Professional learning events (e.g. Conferences; seminars) need to be funded on a 'user-pays' basis.
- **anzea** will seek to obtain sponsorship or contracted funding wherever possible to fund professional practice development events and activity.
- New PPD projects may be initiated from time to time as approved the Board. These may include one-off PPD events run by **anzea** national or **anzea** Branches.

3. Collaboration with other agencies and organisations

anzea will seek to advance the evaluation profession through collaboration with other agencies, including other professional evaluation and research bodies, to provide events and undertake projects that have optimum utility for both the **anzea** membership and others.

Co-hosting

'Co-hosting' refers to the co-hosting of events or speakers by **anzea** together with another organisation. It may be initiated by **anzea** or by another organisation. **Appendix 3** sets out the guidelines for co-hosting events with other agencies or organisations.

C. Table of interim policy amendments

Date approved	Section	Amended policy statement

Appendix 1: anzea Constitution clause 4

4. PURPOSE

anzea is a charitable organisation established solely for the promotion, enhancement and development of high quality services to the peoples of New Zealand through quality evaluation of programmes, services, policy, strategies and other functions delivered or provided by public, private and non-government sectors.

In furtherance of this purpose, the activities of the Association are intended to:

- 4.1 Benefit the community by promoting and facilitating the development of evaluation practices and standards in Aotearoa New Zealand, with specific reference to the principles and obligations established by Te Tiriti o Waitangi and reflecting the unique bi-cultural context of Aotearoa New Zealand.
 - 4.1.1 Promote excellence in evaluation in Aotearoa New Zealand with a focus on the maintenance of appropriate ethical standards for the evaluation profession, development of effective practice and craft, and the promotion of reflective learning as a strategy for evaluation for the public and community well being.
 - 4.1.2 Encourage the accessibility of the services of the Association to evaluation providers, practitioners, purchasers, and others affected by and interested in evaluation.
- 4.2 In addition, the purpose of the Association is to advance education by:
 - 4.2.1 Facilitating debate and exchange of ideas and dissemination of knowledge in the practice of evaluation through the conduct of meetings, conferences, education and training events, newsletters and other publications, and other similar activities.
 - 4.2.2 Promoting the publication of scholarly work relevant to evaluation.
 - 4.2.3 Fostering and facilitating liaison, communication and co-operation between members and other interested parties.
 - 4.2.4 Facilitating liaison with evaluation associations and other related associations in New Zealand and overseas, including the potential for joint activities.
 - 4.2.5 Promoting high standards in curriculum development and evaluation education and training in the tertiary education sector.
 - 4.2.6 Promoting the development of post-graduate courses in evaluation.

Appendix 2: Examples of PPD opportunities

Professional learning

- The annual **anzea** Conference
- Professional development events at the Branch level
- Professional development events regionally initiated and run by the **anzea** Board, including annually (1) one event to advance **anzea** development and (2) one event to generate **anzea** income
- Website resources
- Networking amongst members

Professional practice development

- Activities and services that can contribute to professional development and practice (e.g. development of a framework for evaluator competencies and evaluation practice standards; a mentoring brokerage service; the proposed Voluntary Evaluation Standards Review process)

Appendix 3: Guidelines for co-hosting

The principles of co-hosting

The principles underpinning co-hosting are:

- Collaboration and partnership are core **anzea** values, encouraging **anzea** to actively seek engagement with other relevant organisations and opportunities to collaborate in complementary rather than competitive or duplicative fashion.
- Where there is a clear benefit to **anzea** members, efforts should be made to share the costs associated with relevant events and speakers.

When co-hosting speakers, the following are suggested guidelines from **anzea**'s perspective:

- The primary purpose of the speaker's engagement is that of benefiting **anzea** members so any share arrangement must not compromise this purpose (e.g. in terms of timing and availability)
- Any share arrangement must not detract from the potential financial or other gain to **anzea** of having the speaker address its membership
- No **anzea** Board member or other **anzea** member shall receive any financial benefit from such a share arrangement, with the proviso that:
 - ✧ Any fee paid for an **anzea** member invited to speak on behalf of **anzea** will go to **anzea**, not the speaker
 - ✧ Reimbursement of speaker expenses does not constitute a 'benefit'.

Benefits and risks of co-hosting events and speakers

Benefits	Potential risks
<ul style="list-style-type: none"> • Professional development for anzea members • Lower the costs of hosting speakers, particularly international speakers • Develop or strengthen strategic relationships with other organisations which will be of benefit to members and support the goals of anzea • Market the goals and values of anzea to a wider audience • Potentially increase the membership of the organisation through association with a quality event or speaker 	<ul style="list-style-type: none"> • Financial risk (e.g. event poorly subscribed) • Risks to the anzea brand <ul style="list-style-type: none"> ✧ Potential loss of control of the event (e.g. is associated with, condones or promotes poor or inappropriate evaluation practice) ✧ Perceived conflict of interest (e.g. vested interest in developing relationship for Board members) • Other (e.g. suitability of the proposed venue or location)

Process for co-hosting events

- The speaker will be contacted to determine their interest in a 'share' arrangement
- The inviting agency will discuss desirable geographical or other constraints on the offer to share, to ensure that there will be no negative impact on them of 'sharing'.
- A representative of the inviting agency will make informal contact with the other to see if there is interest in a 'share' arrangement.

- If there is interest, a formal proposal to share will be negotiated with them and then brought back to both organisations for approval.
- Short proposal to the **anzea** Board from the relevant Conference or Branch Committee/s:
 - ✧ Short description of the planned event
 - ✧ Proposed co-hosting arrangement, including: the co-host; cost share amounts; deliverables; how the share arrangement will work in terms of timing, travel, etc.; any other costs to **anzea** (e.g. registrations; advertising; venue pre-payment)
 - ✧ Clarify which budget will support the event (e.g. Conference; Branch; other (e.g. sponsor))
 - ✧ Potential audience size
 - ✧ Outline of benefits to **anzea** members of co-hosting the event
 - ✧ Identification of risks and associated mitigation strategy
 - ✧ Assessment against criteria (L/M/H) ranking
 - ✧ Indicative budget for **anzea** contribution, as well detail of the cost-share arrangement that is being proposed
 - ✧ Clear statement of roles/responsibilities for **anzea** and proposed co-host
 - ✧ Proposed promotion of the event, including branding
 - ✧ Evidence of support by the co-host
 - ✧ A recommendation
- Decision by a sub-Committee of the Board comprising:
 - ✧ Strategic Relations portfolio holder or associate
 - ✧ Professional Learning portfolio holder or associate
 - ✧ Board member from the relevant region.
- The formal letter of agreement to share should set out clearly:
 - ✧ How the share arrangement will work in terms of timing, travel, etc.
 - ✧ Who all the 'share' agencies are (e.g. where a third organisation may be involved)
 - ✧ What topics the speaker will address at each agency
 - ✧ Full details of the cost-share arrangement, including actual payment dates and amounts
 - ✧ Evidence of agreement by all agencies to the proposed arrangements.