



He kura te tangata

aotearoa new zealand evaluation association

www.anzea.org.nz

0800 EVALUATE (0800 382582)

**NEWSLETTER
September 2009**

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Convenor's kōrero

Kia ora koutou,

I am surrounded by signs of new life. The beautiful magnolia outside my kitchen window has flowered and is already fading. In the paddock the daffodils are blooming, and lambs skitter and play alongside their mothers. The kowhai is flowering, and the tui are visiting. The calf sales are on, the day temperatures are climbing. Spring seems to usher in energy to renew, freshen and even recreate our surroundings.

Just as spring has such a wonderful galvanising effect, so too did the success of the 3rd **anzea** conference. The efforts of an inspirational convenor (Kataraina Pipi) and dedicated committee were rewarded with higher participation than we hoped for or expected (over 160 delegates). Thank you to everyone who contributed and participated.

The combination of a truly gorgeous venue and welcoming hosts (Te Wānanga o Aotearoa – Manukau Campus), and a wonderful programme of hui, fono, workshops, papers and speakers, served to inspire and motivate the board to push ahead with a very important strategic project for the evaluation profession.

At the August board meeting, it was agreed that **anzea** will lead the development of a framework of evaluator competencies and practice standards for Aotearoa. The project is of key strategic importance to all evaluators in Aotearoa as well as to commissioners of evaluation, to teachers and trainers of evaluation, and to those who experience evaluation. The development of Aotearoa specific evaluator competencies and practice standards is an important step towards ensuring that evaluation practice in Aotearoa is appropriate, high quality, culturally sound and responsive and ethical; as well as able to meet the learning, development and accountability needs of our organisations, communities, projects and initiatives. As this goes to print, the terms of reference for the project are being finalised. We will update you regularly, as the project gets under way. So watch for emails, keep an eye on the website, and feel free to contact a board member.

We are committed to a participative process of development that draws on the distributed expertise and experience of the profession, our members and other key stakeholders. We will ensure there are many opportunities for input and involvement.

One of these opportunities will be at a series of regional symposium, to be held in the first half of 2010 around the country. These symposiums will be run by branches and supported nationally and will be in lieu of a national **anzea** conference. It remains a priority that **anzea** provide a major professional development event to members each year, and feedback from previous conferences has indicated a high degree of interest in professional development opportunities. A working group is in the process of gathering feedback from our branches, and as soon as we have more details we will let you know. Again, keep a watch for email updates and new information on the website.

The coming year is shaping up to be a very exciting busy one for **anzea**. Your participation is so vital to all that we do. I want to thank you for your continued support of **anzea** and encourage you to join us in the coming months wherever possible, to ensure we continue to build and develop a high quality, responsive, learning profession.

Noho ora mai,

Kate McKegg
Convenor

Quotable quote

‘... innovation is a common, virtually universal experience shared by many and yet felt to be unique every time it happens. There is a mixture of the unique and the transferable, the idiosyncratic and the universal ...’

Saville Kushner *Personalising Evaluation* 2000 (p.80)

anzea Conference 2009

Te Whare Wānanga o Aotearoa Manukau campus opened its doors and welcomed our conference to a beautiful venue that allowed us to experience being and learning together in a location that inspires and encourages learning and promotes cultural development.

Our heartfelt thanks and appreciation to sponsorship provided by SPeAR, The Correspondence School, Ministry of Education, Health Outcomes International and the Wellink Trust.

The conference was promoted as an excellent professional development opportunity intended to offer all those with an interest and involvement in evaluation the opportunity to be part of shaping the evaluation profession and evaluation practice in Aotearoa. The conference theme "*Evaluation and social responsibility: New understandings, pathways and connections - Filling our knowledge baskets*" invited us all to think about how we as evaluators can contribute to a changing world where adapting to hard times is a challenge for us all.

The pre-conference workshops were well attended with a range of free workshops being offered. The three keynote speakers Zenda Ofir, (Sth Africa) Charles Waldegrave and Dr Fiona Cram provided stimulating and thoughtful ideas for us to consider. The four streams of Evaluation and Cultural practice, Evaluation Capacity building, Evaluation Policy and practice and Evaluation methods provided a smorgasbord of 20 workshops and presentations.

Over 160 participants attended the conference. They represented government, community, Māori/Pacific, research and evaluation companies, evaluation practitioners and funders and students. Anecdotal feedback from conference participants indicates a high level of satisfaction with many aspects of the conference, particularly the Māori atmosphere, the relevancy of the content and the opportunity to meet and be with others with an interest in evaluation practice in Aotearoa.

anzea Maori Hui

The **anzea** Hui Māori 2009 was attended by over 25 people and included a mixture of independent evaluation contractors, central government employees, community representatives and members of research companies.

What the participants most liked about the Hui Māori was the whanaungatanga aspect, the opportunity to get to know others, to renew old acquaintances and to meet new people. The Hui provided interactive discussion and debate about evaluation principles and practice, the sharing of stories of evaluation work with and for Māori communities and the opportunity to input into **anzea's** Māori Evaluation development strategy. A highlight of the hui was the coming together of the Hui Māori and Pasifika Fono participants. Hui Māori is seen as a valuable forum to keep going with other topics for consideration suggested for future hui including exploring further the 'how' of evaluation in different contexts, kaupapa Māori approaches, the challenges ahead and exploring 'what works' in evaluation with Māori.

Kataraina Pipi

Talanoa Pasifika - Korero Patipika

Talofa Lava, Malo e Lelei, Kia Orana, Fakalofa lahi atu, Taloha Ni, Ni sa Bula

A Pasifika Fono was held to precede the 2009 **anzea** conference. The Fono focused on providing a foundation for working towards the strategic goals of the **anzea** Pacific Membership Strategy and was a great success generating 45 registrations and 40 attendees on the day.

The programme provided an opportunity for participants to gain a better understanding of evaluation with Pacific communities, participate in two workshops generously contributed by Suaree Borell (Whariki) and Pale Sauni (iglass consultants), a panel discussion chaired by Elizabeth Powell (Director Pacific Development, CMDHB) and to hear from two Pacific providers, Naita Puniani (Acting CEO, South Seas Healthcare) and Tubbs Taisalika (Youth Gambling, Niue Development Inc). The keynote speech was provided by Sua William Sio, MP for Mangere. Sua gave an inspirational speech on why evaluation supports good decision-making and in turn ensures positive outcomes for our Pacific community.

A Fono evaluation form was provided which achieved a 58% response rate. The summary analysis of these forms provided valuable information that will be used to inform future Fono. The Pasifika Fono Report is available on the **anzea** website www.anzea.org.nz

The **anzea** board met and discussed the feedback from the various components of the wider 2009 conference programme and is keen to support more Fono, so watch this space.

Acknowledgements must be given for the warmth and support of those that gave up their time to be part of the Pasifika Fono 2009 programme, those that attended and those that provided their support from afar.

Vinaka vakalevu, Meitaki ma'ata, Fakaue lahi, Fafetatai lati, Malo aupito, Faafetai tele lava

Nancy Sheehan
Pacific Evaluation Development Portfolio Holder

anzea Membership

The number of **anzea** members at July 2009 is 203. The table below provides the number of current members per **anzea** region.

anzea region	Number of members
Northland	2
Auckland	62
Waikato/BOP	23
Central	3
Eastern	1
Wellington	87
Upper South Island	19
Lower South Island	3
Overseas	3
TOTAL	203

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

Benefits to **anzea** members include:

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

Guest editorial

Connecting Evaluation to What People Know

Michael Quinn Patton

Utilization-Focused Evaluation

Evaluation consulting and training has afforded me the opportunity to work with people around the world. In March I returned to New Zealand to offer workshops on *Developmental Evaluation* (DE), an approach that focuses on and draws from complexity theory to inform evaluation of innovation and systems change initiatives. I'll have more to say about DE shortly, but first let me set the context by sharing some of what I've learned about connecting evaluation and evaluative thinking to the local cultures, politics, issues, and environments of the people I work with around the world.

I treat evaluative thinking as a particular way of looking at and engaging with the world that constitutes, in effect, a cultural lens. So, I take a cross-cultural approach to teaching evaluation and engaging in evaluation consulting. We, as evaluators, have our own values, our own ways of thinking, our own language, and our own reward system. When we engage other people in the evaluation process, we are providing them with a cross-cultural experience. They often experience evaluators as imperialistic, that is, as imposing the evaluation culture on top of their own values and culture—or they may find the cross-cultural experience stimulating and friendly. But in either case, and all the spaces in-between, it is a cross-cultural interaction. I've found that approaching evaluation this way has resonated particularly well in New Zealand because of the high degree of cultural sensitivity embedded in New Zealand's social, institutional, and political interactions. At least that's been my experience.

Now then, people who are new to thinking about evaluation as a cultural lens may need help and facilitation in coming to view the experience as valuable. One of the ways I sometimes attempt to engage people in the value of evaluation is to suggest that they may reap personal and professional benefits from learning how to operate in an evaluation culture. Many policy makers and funders are immersed in that culture. Knowing how to speak the language of evaluation and conceptualize programs logically are not inherent goods, but can be instrumentally good in helping people get the things they want, not least of all, to attract resources for their programs and make their work more effective. They may also develop skills in reality-testing that have application in other areas of professional and even personal life.

This culture of evaluation that we evaluators take for granted can be quite alien to many of the folks with whom we work. Like people living daily inside any culture, our way of thinking, shaped by the research culture, seems natural and easy to us. However, to practitioners, decision makers, and policymakers, our logic can be hard to grasp and quite unnatural. I'm talking about what appear to be very simple notions that have profound effects on how one views the world. Thinking in terms of what's clear, specific, concrete, and observable does not come easily to people who thrive on, even depend on, vagueness, generalities, and untested beliefs as the basis for action. They're in the majority. Practitioners of evaluation logic are a small minority. The good news is that our way of

thinking, once experienced, is often greatly valued. That's part of what creates demand for our services.

So because I value evaluative thinking and want to bring others to value it, I look for ways to connect people to evaluative thinking through things they're already familiar with. That's how I got into telling creation stories and interpreting them through an evaluation lens. One of the few universals in the world is that every culture has a creation story, an explanation for how a particular group of people in a particular place, came to be. I've found that taking a familiar creation story, and looking at it from an evaluation perspective, connects with people and opens up a dialogue about the nature of evaluation. I open *Utilization-Focused Evaluation* (Patton, 4th ed., 2008) with an evaluation version of the traditional Biblical creation story and, as many of you have experienced, I often use this to open speeches and workshops.

*In the beginning God created the heaven and the earth.
Then God stood back, viewed everything made, and proclaimed
"Behold, it is very good."
And the evening and the morning were the sixth day.
And on the seventh day God rested from all work.
God's archangel came then, asking, "God, how do you know that what you have
created is 'very good'? What are your criteria? On what data do you base your
judgment? Just what results were you expecting to attain? And aren't you a little
close to the situation to make a fair and unbiased evaluation?"
God thought about these questions all that day and God's rest was greatly
disturbed. On the eighth day God said, "Lucifer, go to hell."
Thus was evaluation born in a blaze of glory.*

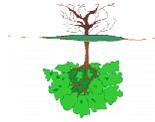
From Halcom's *The Real Story of Paradise Lost*

This is essentially a summative evaluation. God looks at creation and renders an overall judgment of merit and worth: "It is good." A great many creation stories around the world have this form in which a god, or gods, create the world, stand back, and congratulate themselves on a job well done. Summative, self-evaluation. I like to ask program practitioners how credible they find God's summative self-evaluation. Most find it to be a bit on the self-serving, self-congratulatory side. Then I ask them about the credibility of their own judgments about their effectiveness. Hmmmm. Let there be light.

On my first trip to New Zealand for an Australasian Evaluation Society meeting held in Auckland, I learned about and was quite taken with the Māori creation story, in part because it is not summative. Let me hasten to add that one of the characteristics of creation stories is that there tend to be multiple versions and that different story tellers emphasize, add, or delete different elements depending on the occasion and the point the story teller wants to make. I've heard versions with different emphases from both Māori and Pākehā colleagues, and have read somewhat different accounts in books and on web-sites about Māori culture and history. With that caveat in mind, let me share my favourite version and the one I use to illustrate a developmental evaluation approach.

In the beginning *Ranginui* (Rangi), Sky Father, and *Papatuanuku* (Papa), Earth Mother, were intertwined in a fierce embrace. They bore their children between them in a tight, closed space that shut out all light. Confined in darkness, the children became disgruntled and began to plot to separate their parents to create more room and light. After considerable sibling conflict and failed efforts by some of the weaker children, *Tane Mahuta* (Tane) tries. He has carefully observed the failures of his siblings, who tried pushing the parents apart with their arms. Instead, he places his shoulders against the earth and his feet against the sky and pushes slowly with both his upper and lower body. He strained with all his might and soon, and yet not soon, for the time was vast, the Sky and Earth began to yield. Eventually, the separation was complete, and a clearly defined sky and earth emerged.

As the light poured in, Tane saw Rangi, the Sky Father, weeping at the separation from his beloved, and his tears became the rain. Tane also saw that he had exposed the nakedness of Papa, Earth Mother. Ashamed and embarrassed, Tane set about to clothe his mother by planting trees in the earth to adorn her. But because he was inexperienced and ignorant of how plants grow, he planted the trees upside down. He put the leaves in the earth, instead of the roots. When he had done this, he stood back and looked at his handiwork and saw that no birds came and that no animals came and that it was not very beautiful.



Tane reflected on what he saw, took the trees out, and laid them flat on the earth. The trees began to shrivel. So he tried again, this time planting the roots in the ground, with the leaves in the air. Immediately birds flew into the branches and animals came to graze in the shade. He smiled, satisfied. That's what he had in mind. *Tane Mahuta* became the god of forests.

Developmental Evaluation

The Māori story is quite different from the summative evaluation of *Genesis*. *Tane Mahuta* is creating a new world. He is an innovator. He watches and learns from what his siblings try that doesn't work. Once he sets out to clothe his Mother Earth, he tries one thing, and when that doesn't work, he tries something else. He's not even sure what he's trying to create. The outcomes are uncertain. But he knows what he wants when he sees it.

And so we have a creation story of developmental evaluation, of trying something out, watching what emerges, seeing whether or not it works, and then, finding that it did not work, changing the practice to something that does work.

Developmental Evaluation offers an alternative to formative and summative evaluation, the classic distinctions that have dominated evaluation for four decades. The formative-summative distinction was first conceptualized for school curriculum evaluation. Summative evaluations are conducted upon completion of a program to determine whether to continue, expand, or disseminate the program or curriculum. A summative evaluation addresses the most fundamental question in evaluation: Did the program work? This requires clear specification of what the program intervention was, what we call the *IT* question in evaluation. When one says about a program that "it worked" (or didn't work), what is *IT*? What is the thing that worked or didn't work? To conduct a summative evaluation, the program (the *IT*) must be identifiable, specifiable, stable, implementable, standardized, and replicable – otherwise, we don't know what's been evaluated. The *IT* is the model that is being evaluated. That's where formative evaluations come in. A formative evaluation prepares the program for summative evaluation by identifying and correcting implementation problems, making adjustments based on feedback, providing an early assessment of whether desired outcomes are being achieved (or likely to be achieved), and getting the program stabilized and standardized for summative assessment. It is not uncommon for a new program to go through two or three years of formative evaluation, working out start-up bugs and getting the program stabilized, before conducting a summative evaluation.

Over time, formative evaluation has come to refer to any evaluation aimed at improving an intervention or model, but the implication has remained that such improvements are supposed to lead to a stable, fixed model that can be judged as worthy or unworthy of continued funding and dissemination. Moreover, both formative and summative evaluations operate within the assumption that the purpose of the evaluation is to test a model. Formative evaluations improve the model. Summative evaluations test the model to determine whether it produces the desired outcomes and assess whether observed outcomes can be attributed to the program. Through the dominance of the formative-summative distinction, the field of evaluation has reduced programs and innovations of all kinds to just two stages: first, the model improvement stage (formative evaluation) and then the model testing stage (summative evaluation). That's it. That's all evaluators have had to offer. That's how evaluators for 40 years have conceptualized their work.

But where does the model come from? What role is there for evaluation in the very development of a model, before it is even ready for formative evaluation? How can evaluation contribute to innovation?

Management guru Tom Peters argued in his book *Liberation Management* (1996) that social innovators approach change through: Ready. Fire. Aim.

The heavy planning mode, in contrast, he said, involves a process of:
Ready. Aim. Aim. Aim....Fire.

“Ready, fire, aim” means that innovators often engage in change without knowing exactly what outcomes they hope to achieve. They operate from a vision rather than a plan. In the book *Getting to Maybe* (2006), Frances Westley, Brenda Zimmerman, and I reported on case studies of vision-driven social innovators. In that book we argued that under conditions of complexity, characterized by high uncertainty, high turbulence, nonlinear interactions, and dynamic environments, traditional goals-focused planning and evaluation doesn’t work very well, and can actually do harm by inhibiting innovation and adaptation.

“Ready, fire, aim” is equivalent to how knowledge management consultant David Snowden advocates approaching complex situations in his *Cynefin* framework: probe, sense, respond. This means, essentially, try something out (probe), see what happens (sense), and adapt accordingly (respond). Traditional evaluation approaches create barriers to such innovative and exploratory probing by insisting that one must have clear, specific, and measureable outcomes *before* taking action. In contrast, developmental evaluators partner with social innovators to track probing in the arena of uncertain complexity, attend to what happens, be ferocious about getting feedback, and *learn by doing and evaluating*.

The probing, exploring, frenetic, action-oriented approach of social innovators runs counter to the conventional wisdom that extensive planning (aiming) should precede action. But planning only works where you have control and know what the critical factors are. Under conditions of high innovation, uncertainty rules the day. Control freaks perish. Paradoxically, one of the advantages of “Ready, Fire, Aim” is its high and rapid failure rate, facilitating fast learning and speedily moving on.

Traditional goal-based evaluation is completely geared to *Ready, Aim, Fire*. Then the evaluator determines whether the target was hit. That’s what evaluators have been trained to do and, on the whole, we do it well. What we aren’t prepared for and typically don’t know how to adjust to is social innovators whose entrepreneurial and creative mode of operating is *Ready, Fire, Aim*. The developmental evaluator still figures out what was hit (if anything), but the analysis is not a comparison of what was hit to a preconceived target. In providing feedback about what the innovator has “hit” (what immediate outcomes are *emerging*), the developmental evaluator engages the innovator by asking: What’s your reaction to what you’ve hit so far? And what you’ve missed? What does this “hit” tell you? How does what you’ve done so far align with your values and vision? What does this “hit” (or “miss”) tell you about what to do next? Why?

Improvement-oriented, formative evaluation focuses on making an intervention or model better. Developmental evaluation, in contrast, involves changing the intervention, adapting it to changed circumstances, and altering tactics based on emergent conditions. Developmental evaluation is designed to be congruent with and nurture developmental, emergent, innovative, and transformative processes. I’m now working on a book about *Developmental Evaluation* that should be out by the end of the year.

New Zealand and Developmental Evaluation

I found lots of interest in and resonance to developmental evaluation in New Zealand, especially among people interested in innovation. Developmental evaluation is a partnership approach that requires trust and mutual respect between the innovator and the evaluator. It is an approach that is relationship-oriented and relationship dependent, which seemed to be part of what people responded positively to in my workshops. Long-time Kiwi evaluator Bob Williams has reflected on the importance of interpersonal relationships to how things work in New Zealand. In his contribution to *The New Zealand Reader on Evaluating Policy and Practice* (Lunt, Davidson, MeKegg, 2003). he commented:

In the interviews I conducted [on getting evaluations used], most people stressed the importance of personal relationships within and between government agencies. There are close and often personal relationships between ministers, policy advisors, politicians, programme providers, and clients of programmes. Things happen here in New Zealand because of who knows whom and their particular reputations. Process matters—a lot. Evaluations and evaluation processes that sustain or improve these relationships are inevitably more welcome than those that undermine them (p. 198-9).

Developmental evaluation, being relationship-oriented, may well find more welcome and relevance in New Zealand than in places where the evaluator-user relationship is an adversarial, conflict-laden, and audit/accountability-focused one.

New Zealand Metaphors to Illuminate Evaluation

In addition to the Māori creation story, let me share some of the other NZ metaphors that I've used to elucidate evaluation issues, both in New Zealand and elsewhere.

- Being an island, Kiwis are attuned to the rhythms of the tides. In discussing systems thinking for evaluation, an issue that arises is the inherent arbitrariness of where we draw system boundaries (see Williams and Iman. 2006, *Systems Concepts in Evaluation*). I like to ask people where they draw the boundary between the sea and the land. It's actually a shifting boundary, and in times of great turbulence (e.g., cyclones), the shifts and uncertainties magnify. What are the parallels in the programme world?
- On a previous trip, I was flying from Auckland to Wellington with Kate McKegg. We departed in late afternoon and the entire flight was so turbulent the seatbelt sign never went off. Just as the plane was about to land (I could see the runway and estimate we were within 500 feet), the pilot pulled up, announced that suddenly severe wind-shear and an unstable weather front made a landing impossible, and returned to Auckland. We had an important meeting the next morning with the Ministry of Education, so Kate rented a car and drove through the night, with only a short stop for a little sleep, getting us to the meeting just in the nick of time. What does this experience teach us about design flexibility, adaptation, and turbulence in developmental evaluations?
- In utilization-focused evaluation, I emphasize that the initial interactions between primary intended users and evaluators are critical in setting the tone for the entire evaluation process. There no more powerful examples of initial tone-setting in my experience than the powhiri and haka. What do these interactions teach us about setting the tone in evaluations?
- *Kia ora*, I've learned, has a number of meanings, depending on context and use. What does this teach us about the word *evaluation*, its variables meanings, translations, and uses?
- I've described the ongoing interactions between primary intended users and evaluators as a dance of action, reaction, interaction, and adaptation. The dance is accelerated and becomes more improvisational in developmental evaluation. On my recent trip, I had the opportunity to see a group of young women practicing a poi dance. (My thanks to Kataraina Pipi for hosting me, and I understand that the group I saw, which included her daughter, subsequently won the competition). What does the use of the poi in the dance teach us about evaluation tools?
- Differing perceptions about evaluation are always telling. Many associations are negative, evoking fear and resistance. But what if evaluation, like the bird tawake, was perceived as a "beacon of safety"? Could it be? An innovator with whom I worked on a developmental evaluation once told me, "For the first time evaluation feels safe to me, feels like a safe space to experiment and learn without fear of punishment or failure." His words came back to me when I learned about tawake, with its distinctive tail known as the amokura, listening to Kataraina Pipi's lovely CD of original music, *toiora (CD MANU, ODE Record Company, 2003)*. I first met Kataraina when she sang at the International Evaluation Conference in Toronto in 2005. On this recent trip I offered Kataraina the term "developmental evaluation" to label what she's been doing naturally for a long time, and she gave me her song, *Te Amokura*, which challenges and opens up perceptions of evaluation.
- A highlight of my trip was a night-time search for kiwis on a reserve near the Bay of Islands. We used infra-red lamps and sure enough, got to watch a large kiwi rummage for food in a pile of leaves for nearly 15 minutes. What does the unique and precarious ecological niche of the kiwi teach us about the niche of evaluation generally, and developmental evaluation in particular?

Connecting Evaluation to What People Know -- and Don't Know

I introduced this article by noting that because I value evaluative thinking and want to bring others to value it. I look for ways to connect people to evaluative thinking through things they're already familiar with. In my home-state of Minnesota, the land of 10,000 lakes where the last North American glacier melted, the major leisure activity is fresh-water fishing. I often begin workshops here with a discussion of what fishing teaches about evaluation and the issues that surface in fishing, like, what makes for a good day fishing. All the issues we deal with in evaluation have parallels in fishing, so helping non-evaluators make the connection to the familiar opens up the dialog.

But when I want to stimulate creativity, I introduce the unfamiliar, which stimulates people to think in new ways and stretches their grasp of possibilities and meanings. For that purpose, NZ metaphors work beautifully with non-Kiwi audiences. I'll tell the story of Tane, or explain the powhiri and haka, or describe the poi dance, or tell them about my experience searching for and watching the kiwi, and ask: What does this suggest about a creative, developmental approach to evaluation?

My thanks to my Aotearoa colleagues and friends for the precious gift of these metaphors. I carry them with me wherever I go. *Kia ora*.

Board news

anzea Annual General Meeting Minutes

Te Wananga o Aotearoa Manukau Campus, Mangere Auckland
15 July 2009 12.30pm to 1.15pm

Present

MEMBERS: Kate McKegg (Chair), Rachael Trotman (Minutes), Jane Carroll, Melissa Weenink, Katie Owen, Margaret Kilvington, Pauline Dickinson, Jeff Adams, Carol Mutch, Laurie Porima, Shaun Akroyd, Cain Kemehara, Virginia MacEwan, Rae Teyrie, Fiona Cram, Nicola Maw, Kataraina Pipi, Roberta Hill, Jenny Long, Viv Kennedy, Mark Dalgety, Jacqui Henry, Michele Lennan, Anita Langthaller, Robyn Bailey, Peter Ellis, Stella Anderson, Marlane Welsh-Sauni

GUEST: Kay Fisher **APOLOGY:** Pam Oliver

Acknowledgements

Kate McKegg extended a warm welcome to all those at the meeting, including new members to **anzea**. She acknowledged the commitment of the Board members and the hard work of Jackie Pivach, the **anzea** Administrator. Kate encouraged people to consider nomination as a Board member in 2010.

Annual Report

- The Annual Report had been emailed to **anzea** members and was tabled at the meeting (see Appendix One).

Convenor's Report

- Kate spoke to her report. The year 2008/2009 has been a challenging one, in terms of the recession, building membership and inducting new members on the Board. This Conference has been a key driver and focus of the work of the Board in the last six months. In the coming year the aim is to engage **anzea** members more in the work of **anzea**, and especially in strategic projects.
- Key successes in 2008-2009 include achieving charitable status, providing informative newsletters, developing a new website (to be finalised by the end of 2009), record attendance at the last conference and high attendance at the 2009 Conference (161 people), including free workshops plus a Hui Maori, Pasifika Fono and Environment and Sustainability Evaluators networking hui offered alongside the conference.
- Planned developments in the coming year include:
 - Progression of evaluation practice standards for Aotearoa and other professional practice development initiatives
 - Further development of Maori and Pacific strategies and **anzea** branch development
 - A members' survey and membership development
 - Review of **anzea**'s Strategic Plan and Board policies.
- Some discussion was held on the high importance of the professional practice standards to be developed. There was also some discussion on how to link with the AES conference in 2010 in terms of an **anzea** conference or other event. This will be considered by the Board in due course.
- Acceptance of the Annual Report and Convenor's Report was moved by Kate McKegg and seconded by Kataraina Pipi, and agreed by consensus of the members present.

Treasurer's Report and Financial Report

The Treasurer's Report and Financial Report were tabled (see Appendix One) and Rachael Trotman spoke to the report.

Acceptance of the Treasurer's Report and Financial Report was moved by Carol Mutch and seconded by Jane Carroll, and agreed by consensus of the members present.

General business None

Meeting closed at 1.15pm.

Kate McKegg, **anzea** Convenor

Rachael Trotman, **anzea** Secretary

The Annual Report can be accessed on the **anzea** website www.anzea.co.nz

Developing evaluation practitioner competencies for Aotearoa New Zealand

Over the next few months, a Working Group comprising **anzea** Board members will be working on overseeing the development of a set of **anzea** evaluation practitioner competencies and standards for Aotearoa. This work is a strategic priority for **anzea**, as expressed in our Strategic Plan 2008-2010. Some initial work has been undertaken by the board over the past year, with a series of workshops held, in which more than 50 **anzea** members have taken part. This project is timely given the increasing attention by other evaluation associations internationally, and some New Zealand government agencies, to developing evaluator competencies as a key pillar of sound and ethical evaluation practice.

The goal is to develop a set of **anzea** evaluator competencies and standards that are relevant and appropriate to the context of Aotearoa New Zealand.

We will begin the current project by developing a draft framework of competencies and practice standards that will be taken to the membership through a national consultation process to be held from February to July 2010. We will keep you informed of progress, and will provide a range of opportunities for your input and ideas. These are currently being explored and we will update you soon.

Board contact list

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Auckland Branch news

SEMINAR: Living in uncertain times - how the evaluation profession can help the public and policy makers solve today's key problems

Presenter: **Paul Duignan**, Parker Duignan Ltd. May 20

Paul seminar attracted a dozen **anzea** members from the Auckland area. The seminar began with a critique of examples of media debate on current social, economic, political and health phenomenon. Paul argued that these debates could benefit from the application of evaluative concepts such as goal definition, goal chains, goal measurement, indicator trends, accountability and attribution. He challenged us to think about and discuss the role evaluators could play in demanding and developing an evidence base for these outcomes. The seminar generated an enthusiastic energy from the group. People identified opportunities for evaluators to make a difference, in particular through using **anzea** as our professional association to work with government, iwi and other sectors to use evaluation in 'smart' ways.

2009 Auckland Branch events

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

September 24 **WORKSHOP:** *The PEOPLE System: An indigenous planning and evaluation approach for community-controlled enterprises 30 years on.*

Presenter: **John Raeburn**

November 25 **WORKSHOP:** *What do evaluation providers need in an RFP? What do purchasers need in a proposal - Bridging the tender gap*

Presenter: **Pam Oliver**

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

Waikato Branch news

anzea Waikato- Bay of Plenty Branch held a meeting on August 6, 2009, in Hamilton as a follow-up from the informal branch meeting that was held at the national conference for 2009.

Eight people attended and a 'round robin' was undertaken where everyone shared a little personal and professional information about themselves.

Much discussion was had on the types of events or activities the branch could undertake for the year and in the future. Ideas included:

- Showcasing DoView by members who had purchased the software and utilised in their practice
- Continuing informal coffee mornings/afternoons as a time for sharing issues/learning
- Holding regular group sessions where various topics are discussed. Possibly break into specific groups eg. funders, contractors
- Hold reading groups where an article/topic is shared beforehand and later group comes together for discussion
- Investigating training options specifically the Massey course in evaluation

Due to the broad geographical split of members, the next meeting will be held at the Kaimai Cheese Company in Waharoa. Any enquiries about Waikato/Bay of Plenty events can be directed to **Dallas Honey** HoneyD@waikatodhb.govt.nz

Te Tairawhiti

An informal network of about 15 evaluators is developing in Te Tairawhiti. **anzea** Board members Rachael Trotman and Laurie Porima facilitated an introduction to evaluation for about 30 people in Tairawhiti earlier in the year and this provided a good platform from which to establish a regional network.

The group has had ongoing support from the **anzea** Board and recently hosted **anzea** Branch Development portfolio holder, Shaun Akroyd who presented more information about the national organisation.

Shaun's presentation coincided with the third meeting of the group and Dr Jennie Harre-Hindmarsh presented an overview of her role as Research Coordinator for Ngati Porou Hauora and some of the recent studies the organisation has undertaken and participated in.

The Tairawhiti network plan to meet at least quarterly and welcome visiting evaluators to share training and project activities with members of the local network.

Wellington/Lower North Island Branch news

Any enquiries about Wellington/Lower North Island events can be directed to **Melissa Wenink** melissa.weenink@minedu.govt.nz

Christchurch/Upper South Island Branch news

SEMINAR: *Purchasing evaluation: Tips and pitfalls*

Presenters: **Kim Sinclair**, HEHA; **Micheal O'Dea**, Partnership Health Canterbury and **Keith Tyler Smith**, Tertiary Accord of NZ.

On May 6 **anzea** upper South Island branch hosted a presentation on the topic "Purchasing Evaluation: Tips and pitfalls for Evaluators".

Three speakers (Michael O'Dea, Partnership Health Canterbury, Keith Tyler-Smith, CPIT and Kim Sinclair, HEHA, CDHB) presented on the topic with each person taking a different angle. Key messages for evaluators which came through from the presenters were: (i) the need to listen to the evaluation needs from the outset (ii) spend time scoping to ensure that the evaluation best meets the needs of the purchaser (iii) the importance of showing a clear understanding of the intervention in an evaluation proposal (iv) maximising collaboration and intersectoral approaches (v) demonstrating value for money and the ability to deliver and (vi) the importance of not promising what cannot be delivered. Despite miserable weather, the forum was attended by around 12 attendees, including a couple of new faces and the feedback was positive. A big thanks to our speakers.

Seminar: *Running a small evaluation / self employed business – tips & tax breaks*

Presenters: **Pam Glover**

On Friday June 26 **anzea** upper South Island branch hosted a breakfast meeting "Running a small evaluation or self employed business – tips and tax breaks".

Pam Glover discussed over breakfast at 8:00am at Bohemian Café and Bar. Pam has several years experience working in the Financial Sector and is self employed so was happy to manage a question and answer session for the interested attendees. Pam has

had a varied career working in audit, analysis, evaluation and financial service roles for the past 20+ years. Interestingly, we got some **anzea** members at this time of the day who have never made it to evening events. It was a cosy and most useful breakfast meeting. Thanks to Pam Glover.

Further 2009 events

August 28 **Two workshops** to be co-presented by Kataraina Pipi & Kate McKegg:

WORKSHOP 1: *'Making evaluative judgements – using evaluative criteria, including a Maori lens'* from **1:00-3:00pm**.

WORKSHOP 2: *'How Pākehā work with Maori groups in evaluation projects'* from **4:00-5:30pm**

Cost: **Free for anzea members, \$40 for non members (\$20 per workshop).**

Venue: Baptist Church, Oxford Terrace and Madras St (just before Kilmore St)
Afternoon tea, drinks and snacks will be provided.

RSVP: libpaul@globe.net.nz by Wed August 26, 2009

Resources, conferences, journals

The Evaluating Sustainability Network forms in affiliation with anzea.

A pre-conference workshop was held to initiate the Evaluating Sustainability Network (ESN). Enthusiastic conversations arose about the challenges of evaluating sustainable development initiatives and how a network could build capacity in this interesting field. Thirteen people attended the workshop with backgrounds in environmental management, health, urban design and education. Alison Greenaway from Landcare Research led the workshop, agreeing to coordinate the networking for the next two years. The network will meet at least every 6 months, with the next meeting linked with the **anzea** Auckland branch. Members are encouraged to have voluntary **anzea** membership. The **anzea** board warmly welcomes the affiliation of this network and are keen to support future activities. A profile of the network will be posted on the **anzea** website, with links to Alison's contact details. Please get in touch with her directly if you are keen to find out more about the network or have ideas for evaluating sustainability.

Alison Greenaway

Social Researcher, Landcare Research
Private Bag 92170, Auckland 1142, +64 9 574 4133

Learning for sustainability site update (July 09)

The Learning for Sustainability (LfS) web portal - <http://learningforsustainability.net> - brings together resources that help address the social and capacity building aspects of managing collective interests. The site highlights the wide range of social skills and processes that are needed to support constructive collaboration, and indicates how these skills and processes can be interwoven to achieve more integrated and effective outcomes. This New Zealand-developed site brings links to several hundred annotated on-line resources from different sectors and geographic areas together in one easy to access site. This update provides a brief introduction to new links that have been added, and more detail is provided through the on-line newsletter available at <http://learningforsustainability.net/newsletters/jul09.php>.

New portal content

Most pages have been expanded with new resource links. Particular attention has been paid to expanding the sections on undertaking interdisciplinary/integrated projects and adaptation. Other updated resource sections link to resources to support thinking and practice around managing complex systems, community resilience, and participation. A

central 'guides, tools and checklists' section is designed to support agency staff and others managing multi-stakeholder participation and engagement initiatives. Other site sections provide links to best and emerging practice in specific areas including social learning, adaptive management, network building/mapping, dialogue, knowledge management, and evaluation.

Recent research papers and reports

The featured links for this issue are drawn from some of the sections recently updated. As the LfS pages show there is a wealth of really good national and international material available - so this section is by no means intended as an award list, it just lists a selection of recently published material that you may not have already come across. Direct links to these papers are provided through the on-line newsletter.

- **Bonfire** - The latest issue of the International Institute for Facilitation and Change (IIFC) magazine. <[link to this and other facilitation resources](#) >
- **Canadian communities' guidebook for adaptation to climate change** - This report explores the potential for adaptation to climate change by suggesting a process closely tied to on-going planning cycles to help decision-makers in incorporating responses climate change into their local development initiatives. <[link to this and other adaptation resources](#)>
- **Expressive lives** - This Demos publication is a collection of essays that examine the idea of 'expressive life'. It helps us to see creativity and heritage as the fabric of our society that gives meaning and value to our lives. <[link to this and other dialogue resources](#)>
- **Integrating the social and natural sciences in environmental research** - This discussion paper considers the practical and intellectual challenges that attend efforts to integrate the social and natural sciences in environmental research. <[link to this and other integration resources](#)>
- **Climate Change: Global risks, challenges and decisions** - This 2009 synthesis report presents an up-to-date overview of a broad range of research relevant to climate change – including fundamental climate science, the impacts of a changing climate on society and environment, and the many tools and approaches available to deal effectively with the challenge of climate change. <[link to this and other global reports](#)>

Sharing, feedback, visits, subscribing and unsubscribing

This update is posted on an occasional basis (around 3-4 times/year) - please feel free to forward to interested colleagues. Feedback is welcomed, and visitors are encouraged to suggest papers, reports and other material to add. Thanks to those of you who have pointed to papers and other links for inclusion and sharing among the wider global community of practice in this area. This month the site has averaged around 450 visitors each day, with the highest number of visits in any one day this year being in excess of 1500. You have received this newsletter because you have signed up for updates from the original NRM-changelinks site or the LfS site. You may also have material referenced through the portal, or indicated your interest in joining directly to me. You can unsubscribe, or subscribe, from the [LfS update subscription page](#). Alternatively you can subscribe by sending an e-mail to LfS-update-subscribe@learningforsustainability.net or unsubscribe by sending an e-mail to LfS-update-unsubscribe@learningforsustainability.net.

Wishing you all the best with your ongoing activities.

Dr. Will Allen

LearningForSustainability.net - <http://learningforsustainability.net> - Supporting dialogue, collective action and reflection. E-mail: will@learningforsustainability.net

NEWS relevant to evaluation and evaluators

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

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

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

The National Centre of Mental Health Research. Information and Workforce Development: www.tepou.co.nz/

Developing evaluation resources for developing countries

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

Free evaluation resources for developing countries:

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

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

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

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

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

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

Get involved!

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

- Building regional membership – contact Nancy Sheehan
nancysheehan@clear.net.nz
- Help with redesigning and/or managing the **anzea** website – contact Tania Wolfgramm tania.wolfgramm@gmail.com

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.

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

Proofreading, editing and related services

Kia ora fellow **anzea** members! Need help with writing/preparing a document? A publication of any kind, such as a report, presentation, assignment, essay, or thesis? I offer a range of support services including word processing, proofreading, editing, and layout. I am an experienced evaluator/researcher/policy analyst with over 20 years of writing for a wide range of clients and audiences. I specialise in social sciences and public health. To contact me ph Jo 372 7212; email joadams@xtra.co.nz; website www.waihekewellness.webs.com

Experienced journalist, writer, researcher and editor

Experienced journalist, writer, researcher and editor, is keen to obtain interviewing and or writing work that has a specific brief, and is suitable for someone making their first forays into the field of evaluation. Johanna writes in a range of styles to suit the medium and the audience, and specialises in making complex information accessible to laypeople. Previous clients have included MoRST, HSC, Te Papa, and MOTAT. For more information and or to obtain CV, please contact Johanna Knox, 027 825 8790 or johanna.knox@gmail.com

How to join anzea

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

anzea membership form 2008-2009

DECLARATION

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

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

My membership status is (tick one):

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

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

Optional donation \$_____

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

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

Name: Aotearoa New Zealand Evaluation Association

Bank: Kiwibank Ponsonby

Account: 389006 0153121 00

in the name of _____

[insert your account name]

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

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

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

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

<p>CURRENT PRIMARY EMPLOYMENT</p> <p>Position:</p> <p>Organisation:</p>	<p>TRAINING AND QUALIFICATIONS</p>
<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"> • • • • 	
<p><i>Office use only:</i></p> <p>Date received:</p> <p>Cheque banked:</p> <p>Receipt number:</p> <p>Confirmation sent:</p>	