Taumata inauguration 9 Aug 2011 – Address by Ian Trotman

Unless you've been in a similar situation as this, which as Pam [Oliver] noted is very emotional and I found enhanced by the Maori protocols, it is difficult to appreciate. Some of the feelings and thoughts that go through one's mind include much questioning about one's worthiness, recognition that most of the achievements relied on others, including some unknown, and to the luck of timing, and a combination of, I suppose, attempted self-justification and hope that others will be encouraged by such awards and their recognition of the importance of peer evaluation and peer recognition.

All I can really say is thank you.

And now back to the prepared task.

Last year I turned 70 and promised my wife and family I would reduce my involvement in all four professional bodies with which I am involved. When I began thinking about what to say on this occasion I considered a 10 minute ramble on the evolution of evaluation since I have been involved for about 25 years, but realised this would take a lot of preparation and probably be a fuddy duddy activity few would appreciate. So I wondered if there was anything short and sharp that might be more worth saying. I am a great believer in leaving problems to the subconscious for a few days if time permits.

As I thought about what I have done since retiring and writing some historical papers on evaluation in NZ, and of the AES, along with working on some AES projects for about the first 5 years; and trying to get to 2-3 local group meetings a year for AES and more recently **anzea**.

I have a clear impression arising from attending these that there are several times when it appears we are reinventing the wheel or having to relearn from mistakes. Three such examples appeared to highlight themselves.

1) *First, and most important as it is often overlooked, is the importance and utility of conducting or reviewing a needs analysis*

This step is to clarify and set down the objectives the programme, or delivery organisation or mechanisms are seeking to achieve - so that one has something to assess its delivery, utility, and values against. Most importantly any subsequent evaluation of the programme, or delivery organisation, or method must include reviewing if the same objectives still apply or have

subconsciously or consciously been shifted, or whether with the progression of time they need revising and readoption.

   2) *Secondly; the usefulness of using a consultation, or preferably, in my experience, an external quality assurance panel*

Such panels can be for a range of purposes; whether it is for a PR aim of looking good, genuine consultation with all, or a representation of stakeholders, or as a more restrictive quality assurance, or some combination of these.

The best example in my experience was primarily for quality assurance but also had partial stakeholder representation. A key point we found was that size matters. A number between 5-7 panellists seemed to be more workable both for admin and servicing and for discussion and contribution.

We found in the example of reviewing organisations and selective samples of their main functions it useful to include representatives from leading professional bodies represented in the organisations, from an organisation in a similar type of activity whether service delivery, regulatory or financial, and from major lobby groups, and an outsider with an evaluation experience. The group assembled at 3 critical stages in an evaluation.

- After scoping and developing a draft plan;
- After collecting information, developing major findings, and forming tentative conclusions pointing to a possible draft report outline;
- At the draft report stage.

   3) *Thirdly; using informed and trusted colleagues for problem-solving*

This point was reinforced about three months ago in a local presentation and demonstration by 4-6 female colleagues who are independent evaluators. I would not normally highlight the gender, but I'm not sure you could find six blokes who were not too proud to share their problems and seek help like this group. Their workshop clearly demonstrated the utility of the approach so I will share the bare bones of it with you. It can be used for a wide range of problems/issues including resourcing, methods, and QA.

It needs a facilitator to introduce the process, negotiate timeframes, and guide the process; a group of willing participants, with the greater the diversity usually the richer the perspectives. It is vital all feel safe in participating face to face. One issue is dealt with at a time, but more than one issue can be covered if there is time.

1. A participant presents an issue outlining enough of the project or situation to gain understanding and clarify their question.
2. Members ask clarifying questions until clear about the situation and the question.
3. The presenter then turns away from the group or sits outside the circle.
4. Group members go around the circle raising or discussing among themselves **only one point at a time** the issue - to provide different perspectives, other ideas or possible solutions. There should be no cross talk, moving around the circle each raising a single point. The presenter can take notes as they wish.
5. When the agreed time is up the facilitator invites the presenter back to share any new insights and ideas gained from the process.
6. The group then reviews the process to gain any learnings and improvements to it.

4) Lastly; a final point

I recently heard a talk by a retiring government CE who made the point that the late 80s early 90s reforms had tended to focus on silos and that the major need for the future was going to be integration and sharing interdisciplinary perspectives and skills to address many of our issues more holistically. I have also often thought such a shift in direction was desirable, particularly as from my experience this more holistic approach is one of the major benefits observed when using interdisciplinary evaluation teams.

Thank you for listening and I trust something of what I have shared resonates with you.

Ian Trotman