

# IOCE EvalPartners profile survey of Voluntary Organizations of Professional Evaluators (VOPEs)

## I. Basic profile information

<b>1. Name and acronym of organization (VOPE)</b>	<b>Aotearoa New Zealand Evaluation Association (anzea)</b>
<b>2. Geographic scope of organization</b>	National : New Zealand
<b>3. Contact Details</b>	Name of main contact person: Jackie Bourne E-address: <a href="mailto:info@anzea.org.nz">info@anzea.org.nz</a> Postal address: PO Box 106732 Auckland New Zealand Telephone:0800 382 582 VOPE website URL: <a href="http://www.anzea.org.nz">www.anzea.org.nz</a>
<b>4. Current membership – numbers of individuals, by their affiliation (if known; please at least give total)</b>	Government: NGOs/CSOs: Academics: Private sector (consultants): Other: <b>Total membership:342</b>
<b>5. Year VOPE was founded</b>	2006
<b>6. Current status (identify which)</b>	<ul style="list-style-type: none"> <li>• Charter and bylaws adopted- Charitable trust status</li> <li>• Legally recognized by government</li> </ul>
<b>7. Information about growth: evolution of the number of members or financial resources in the last 5 years.</b>	2006/2007 – 132 members 2007/2008 – 202 members 2008/2009 – 167 members 2009/2010- 202 members 2010/2011- 328 members 2011/2012 – 342 members
<b>8. Purpose and mission of VOPE</b>	The main goals of anzea are to: <b>Promote and facilitate the development of evaluation practices and standards</b> which are relevant to Aotearoa New Zealand, with particular reference to the principles and obligations established by Te Tiriti o Waitangi and reflecting the unique bi-cultural context of Aotearoa New Zealand, while also providing a framework from which multi-culturalism can be embraced and responded to. <b>Promote excellence in evaluation</b> in Aotearoa New Zealand, with a focus on the maintenance of appropriate ethical standards for the profession; the development of evaluation as a skilled practice, a craft requiring methodological appropriateness and quality; and supporting evaluation as a learning and change strategy, and the role of evaluators in informing any change process across policy and programme development and implementation. <b>Facilitate debate and exchange of ideas and dissemination of knowledge</b> in the practice of evaluation through the provision of meetings, conferences, professional development, education and training events, newsletters and other publications, and other activities
<b>9. Current strategy and emphasis</b>	To build <b>anzea</b> as the voice of evaluation, promoting evaluative thinking and action in the unique bicultural and multicultural context of Aotearoa New Zealand
<b>10. Organizational capacity:</b> Please describe your governance structure, leadership, services provided, finances, human resources, linkages with other organizations, etc.	anzea is a charitable organisation governed by a board of 12 members comprising Convenor, Deputy Convenor, Treasurer, Secretary, Membership Secretary and seven general Board members. The anzea membership is divided into 8 regions within New Zealand. A Manager is contracted part time to oversee anzea's administration and financial operations. anzea's services include an annual National Conference, regular branch meetings and networking opportunities, a newsletter published three times a year, evaluation digest, a website, professional development training and workshops. (Not sure about linkages with other organisations??)
<b>11. Means of communication with members, e.g. newsletter, listserv, publication, website</b>	Newsletters, website, email, branch events, Conference, workshops
<b>12. Past events (e.g. during</b>	Branch events and workshops, National Conference

past year)	
<b>13. Forthcoming key events/ conferences – dates, location</b>	National Conference July 8/9/10 in Hamilton.
<b>14. Name and e-address of person submitting this information</b>	Jackie Bourne <a href="mailto:info@anzea.org.nz">info@anzea.org.nz</a>
<b>15. Date of this update</b>	18 Apr. 12

## II. Experience with Evaluation Capacity Building

<p><b>1. Background:</b> Please provide a brief history of the formation of this organization (VOPE).</p> <p>1.1 Who were/are the key players?</p> <p>1.2 How many members do you have on your governing board/ committee?</p> <p>1.3 What are the main existing strengths that your VOPE is trying to capitalize on?</p> <p>1.4 What are the main challenges that your VOPE is trying to address?</p>	<p><b>anzea</b> was established in 2006 by a group of evaluators who had met regularly since 2003 to discuss and develop the concept of a national association. Significant key players – Pam Oliver, Kate McKegg, Maggie Jakob-Hoff, Geoff Stone, Michele Lennan, Michael Blewden, Laurie Porima, Tania Wolfgramm, Jacqui Henry.</p> <p>The governing board has 12 members that consists of: 1. Convenor 2. Deputy Convenor 3. Secretary 4. Treasurer 5. Membership Secretary 6. Seven (7) general Board members.</p> <p>A key strength of the association is the strengthening Māori and Pacific evaluation capability. Having such a depth of cultural knowledge and expertise within the community gives anzea a unique opportunity to contribute to the development of evaluation practice and theory in ways that respond to, and privilege different world views and perspectives.</p> <p>Another strength of New Zealand's evaluation community is its small 'degree of separation' and therefore it's ability to network and share evaluative thinking and practice among members of the community.</p> <p>One of the main challenges for the association is financial sustainability, as the evaluation community is relatively small. The association therefore relies heavily on members to volunteer their resources and time to build the necessary infrastructure for evaluation to thrive in Aotearoa, New Zealand.</p>
<p><b>2. Organizational motivation:</b> What were/are the driving forces of the VOPE and its historical development?</p>	<p>After the Australasian Evaluation Society Conference (AES) of 2003 (held in Auckland), evaluators throughout Aotearoa New Zealand debated the need, value, and feasibility of establishing an Aotearoa New Zealand professional body for evaluators. While a range of organisations currently provide varying kinds of professional support to local evaluators<sup>1</sup>, advocates for a the establishment of a national association felt that such an organisation would potentially better serve and represent the unique needs, obligations and working context of Aotearoa New Zealand evaluators.</p> <p>A consistent theme in the discussion was the view that it would be appropriate and timely to establish a bicultural body which explicitly acknowledges te Tiriti o Waitangi (The Treaty of Waitangi is the founding constitutional document of the country; signed between Māori tribes of Aotearoa and the British Crown in 1840) and the specific bicultural and multi-cultural context of Aotearoa New Zealand. Many could see value in developing practice frameworks (e.g. evaluation standards, ethics, etc), which explicitly acknowledge the uniqueness of the environment and manner within which evaluation is practiced within Aotearoa New Zealand.</p> <p>Through workshops and stakeholder consultations over several months, New Zealand evaluators identified a range of needs that an organisation like <b>anzea</b> could meet. These included, but were not limited to:</p> <ul style="list-style-type: none"> <li>• providing leadership on professional accountability, standards and quality practice (i.e. through the development and dissemination of</li> </ul>

<sup>1</sup> Including (in alphabetical order): American Evaluation Association; Association of Social Science Research; Auckland Evaluation Group; Australasian Evaluation Society; Maori Evaluation Association; **SPE@R**; Waikato Evaluation Group; Wellington Evaluation Group.

	<p>practice standards, professional competencies and training for commissioners, evaluators, and users);</p> <ul style="list-style-type: none"> <li>• the further development and enhancement of evaluation models, frameworks, theories and practices that pertain to Aotearoa New Zealand;</li> <li>• provision of mentoring support to evaluators;</li> <li>• stimulation and support to further evaluation groups throughout the country;</li> <li>• enhanced information and knowledge sharing between the evaluation community (e.g. management of web-based resources and case-studies for evaluators).</li> <li>• brokerage and relationship development between the government as the primary purchaser of evaluation in Aotearoa New Zealand and professional evaluators;</li> <li>• more regular national professional development opportunities, including an annual national evaluation conference, and regular training opportunities;</li> <li>• provision of professional support services.</li> </ul> <p>Although there were (and still are) many evaluators who had long standing relationships with the Australasian Evaluation Society (AES); and valued these relationships, there was a broad acknowledgement, that the AES was not able to serve the unique needs and context of New Zealand’s evaluation community – particularly in relation to indigenous evaluation theory and practice.</p>
<p><b>3. Evaluation Capacity Building:</b> What has your VOPE done to promote evaluation (M&amp;E) capacity?</p>	<p>One of the major capacity building projects the association has undertaken is the development of a set of evaluation competencies. As one of the distinguishing features of anzea is its commitment to cultural competency in evaluation, the competency framework was developed with cultural competency embedded within it. Specifically, the framework of competencies were developed to:</p> <ul style="list-style-type: none"> <li>• inform and guide sound and ethical evaluation practice in Aotearoa New Zealand, in a range of roles relevant to evaluation practice</li> <li>• support the growth and maintenance of culturally competent evaluators and evaluations</li> <li>• assist evaluators or evaluation teams to identify those competencies that are important in any given evaluation situation</li> <li>• provide guidance to trainers, teachers of evaluation and tertiary institutions about the minimum or graduating standards for evaluators in Aotearoa New Zealand</li> <li>• provide a basis for voluntary self-review by evaluation practitioners and organisations, and checklist to assist with professional development</li> <li>• support the development of employment criteria or standards for various evaluation positions or roles</li> <li>• provide commissioners of evaluation with an understanding and expectations of evaluator or evaluation team competencies, and a potential tool which could be used to inform their judgments about the best fit of the evaluators or evaluation teams during the evaluation commissioning process</li> <li>• increase public awareness and understanding about the dimensions that make up ‘good’ evaluation practice in Aotearoa New Zealand</li> </ul> <p>With its focus on capacity building, particularly in relation to indigenous evaluation, anzea has also developed a digest of indigenous New Zealand evaluation resources (<a href="http://www.anzea.org.nz/index.php?option=com_content&amp;view=article&amp;id=107&amp;Itemid=115">http://www.anzea.org.nz/index.php?option=com_content&amp;view=article&amp;id=107&amp;Itemid=115</a>; and worked with the Social Policy Evaluation and Research committee of government to develop in depth practice based vignettes that give expression to indigenous values relevant to evaluation.</p> <p>The other major focus of anzea’s capacity building activity is its annual conference and support of its regional branch activities. The annual</p>

	<p>conference has a commitment to being accessible to a wide cross section of NZ society; i.e., evaluators, evaluation commissioners, evaluation users, community leaders and organisations, students etc.</p>
<p><b>4. Context / target entities:</b> More specifically, who are the persons or institutions your organization seeks to influence (to strengthen evaluation capacity)? For example:</p> <p>4.1 Technical capacities to <i>supply</i> quality evaluations, partnering with experts, local universities or others to provide training for members, etc.;</p> <p>4.2 Strengthening VOPE organizational capacity itself;</p> <p>4.3 Enhancing the enabling environment for evaluation, including strengthening the <i>demand</i> for and use of evaluations by policy makers;</p> <p>4.4 Influencing governmental policies related to evaluation, evaluation designs and implementation of M&amp;E systems, etc.</p>	<p>The major focus of the organization since its inception in 2006, has been supporting the building of evaluator (supply) capacity and quality, and on the organizational capacity of the national association.</p> <p>The major funder / commissioner of evaluation in New Zealand is the government, and more recently there is a small but growing demand in the philanthropic sector. Influencing the enabling environment, or demand side of the system, has been less of a focus for the association; although the association's governing board retains members who are senior government employees to ensure that the association continues to remain relevant to key policy and institutional demands.</p> <p>Clearly identified by evaluators in the early years of the association, was a desire for a national association that could advocate and influence evaluation policy and practice in government. This remains a strategic priority of the association, although there is still work to be done to unpack what advocacy might be interpreted in the New Zealand context – in particular how it fits into the broader anzea goals, what might be advocated, and what the means and resources involved in advocacy might entail.</p>
<p><b>5. Public accountability:</b> Is your VOPE helping to strengthen oversight and transparency of government programs? If so, in what ways? Can you share any success stories of evaluators or others promoting public accountability?</p>	<p>One of the major evaluative developments within New Zealand government in recent years has been the system wide implementation of an evaluative approach to the review of tertiary institutional performance. One of the leaders of this development is an anzea board member.</p> <p>This systemic change has introduced an evaluation specific methodology to the external and self review of tertiary organisation's performance. The quality assurance framework uses the theory and practice of evaluation in order to focus on the quality of educational outcomes. Evaluation's use in tertiary education review provides a practical approach to focusing on outcomes and key contributing processes, using both qualitative and quantitative information. Evaluative quality assurance draws on a wide range of international theory and practice, in particular mixed method and participatory approaches, to arrive at a robust process for reaching consistent and comparable judgements. (See <a href="http://www.nzqa.govt.nz/providers-partners/registration-and-accreditation/external-evaluation-and-review/policy-and-guidelines-eeer/introduction/">http://www.nzqa.govt.nz/providers-partners/registration-and-accreditation/external-evaluation-and-review/policy-and-guidelines-eeer/introduction/</a>)</p>
<p><b>6. More specifically, what are some of the key themes for which you advocate?</b> For example, are you promoting issues related to cultural sensitivity, equity, social justice, empowerment, transformation, gender, environment, poverty? If so, please describe or attach relevant documents.</p>	<p>As previously discussed, one of the key goals of the organization is to promote and foster to Aotearoa New Zealand, with particular reference to the principles and obligations of Aotearoa New Zealand, while also providing a framework from which multi-culturalism Promote excellence in evaluation. This theme is embraced within most of the work of anzea as the competency framework – attached).</p>
<p><b>7. Methods:</b> Experiences in strengthening skills of individual members, by (for example):</p> <ul style="list-style-type: none"> <li>• organizing workshops led by local experts;</li> <li>• organizing webinars with international speakers;</li> </ul>	<p><b>anzea</b> has now run many workshops at national and regional levels. Workshops are held regularly at the regional branches with local or national experts providing low cost / or free training and development for local evaluators.</p> <p><b>anzea</b> has also run a mentoring programme for those evaluators who expressed interest in mentoring new or entrant evaluators.</p>

<ul style="list-style-type: none"> <li>designing and delivering e-learning programmes;</li> <li>administering mentoring programmes; etc.</li> </ul>	<p>As yet, <b>anzea</b> has not yet run webinars nor has it yet developed the capacity to run e-learning programmes.</p>
<p><b>8. Standards:</b> Has your VOPE developed professional standards/ ethical codes/ competencies (or adheres to those developed by others)? If so, please provide documentation.</p>	<p>As discussed above, <b>anzea</b> has developed a set of evaluator competencies (documentation attached). <b>anzea's</b> competency framework sits within a broader quality framework</p>
<p><b>9. Job opportunities:</b> Do you share employment/ consultancy opportunities with evaluators on your database?</p>	<p>Yes we advertise employment or contract opportunities on our website</p>
<p><b>10. Progress and results:</b> What progress has been achieved so far in any of the above or other domains? What are expected and unexpected results achieved?</p>	
<p><b>11. Lessons learned:</b> Recommendations/ tips to others for good practices on how to organize and sustain VOPEs like yours.</p>	
<p><b>12. Next steps:</b> What does your organization plan to do next?</p>	<p><b>anzea</b> has a strategic plan that sets out its intended steps over the next few years (attached).</p>
<p><b>13. Willing to share with other VOPEs?</b> For example, would you be interested in forming peer-to-peer partnerships with one or more other VOPEs to share lessons learned, advise each other? If so, describe what you would be willing to share / advice you would seek.</p>	<p>Of course <b>anzea</b> would be willing to share lessons learned.</p>
<p><b>14. Suggestions:</b> What ideas do you have for what should be included in activities of the EvalPartners Initiative?</p>	
<p><b>15. Want to be actively involved?</b> Does your VOPE want to be actively involved in EvalPartners? If so, in what ways?</p>	<p>Yes indeed.</p>