

New Zealand: Aotearoa New Zealand Evaluation Association (anzea)

Strengthening the representation of indigenous and South Pacific voices in evaluation

By Kate McKegg, Convenor

Background: The Aotearoa New Zealand Evaluation Association (**anzea**) was established in 2006 by an enthusiastic group of New Zealand evaluators who had met regularly since 2003 to discuss and develop the concept of a national association. Significant key players in the association's conception and development were Pam Oliver, Kate McKegg, Maggie Jakob-Hoff, Geoff Stone, Michele Lennan, Michael Blewden, Laurie Porima, Tania Wolfram and Jacqui Henry.

The new association was set up with a governing board of 12 members that consists of: Convenor, Deputy Convenor, Secretary, Treasurer, Membership Secretary, and seven (7) general Board members. The association has a relatively large board, compared to some non-government organisations in New Zealand. It was considered vital to have the representation of key groups in New Zealand society on the association's governing body. The constitution makes reference to ensuring representation of Māori, Pacific people, migrants and the community, as well as to striving to achieve a gender balance on the board, and on committees and sub committees of the board.

The main goals of **anzea** are to:

Promote and facilitate the development of evaluation practices and standards which are relevant to Aotearoa New Zealand, with particular reference to the principles and obligations established by Te Tiriti o Waitangi (Treaty of 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.

Promote excellence in evaluation 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.

Facilitate debate and exchange of ideas and dissemination of knowledge in the practice of evaluation through the provision of meetings, conferences, professional development, education and training events, newsletters and other publications, and other activities.

Until the mid-2000s, an annual national meeting of evaluators – in New Zealand - did not occur regularly. Until **anzea's** formation, the professional evaluation association for New Zealand evaluators was the Australasian Evaluation Society (AES). Once every seven years or so, the AES holds its annual conference in New Zealand, but apart from this event, there were no other annual meetings of evaluators in New Zealand. The benefits of coming together to share New Zealand evaluation practice, theory, issues and opportunities at a national meeting were starkly evident to a growing body of New Zealand evaluators, when in 2003 the AES held their annual conference in Auckland, New Zealand. We realized there were many New Zealand evaluators and other community based stakeholders who had never before accessed the AES conferences due to cost barriers, and were therefore missing out on important professional development opportunities.

Furthermore, the 2003 AES conference was a very New Zealand style of conference, with a strong emphasis on ensuring the participation, access, voice, and leadership of Māori and Pacific evaluators. Our cultural differences to Australia were never more evident than at this conference. This conference experience created the motivation we needed to begin discussing the development of our own national association.

From 2003–2006 evaluators throughout Aotearoa New Zealand debated the need, value, and feasibility of establishing an Aotearoa New Zealand professional body for evaluators. A consistent theme in the discussion was the view that it was appropriate and timely to establish an evaluation organization which explicitly acknowledges Te Tiriti o Waitangi (The Treaty of Waitangi - this treaty 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 having an association able to support the development of practice frameworks (e.g. evaluation standards, ethics, etc.), which explicitly acknowledge the uniqueness of the cultural context and practice of evaluation in Aotearoa New Zealand.

In the NZ context, while a range of organisations already existed, providing varying kinds of professional support to local evaluators¹, advocates for the establishment of a national association felt that such an organisation would better serve and represent the unique values, needs, obligations and working context of Aotearoa New Zealand evaluators.

Through workshops and stakeholder consultations were held over several months, New Zealand evaluators identified a range of needs that an organisation like **anzea** could meet. These included, but were not limited to:

- providing leadership on professional accountability, standards and quality practice (i.e. through the development and dissemination of practice standards, professional competencies and training for commissioners, evaluators, and users)
- the further development and enhancement of evaluation models, frameworks, theories and practices that pertain to Aotearoa New Zealand
- provision of mentoring support to evaluators
- stimulation and support to further evaluation groups throughout the country
- enhanced information and knowledge sharing between the evaluation community (e.g. management of web-based resources and case-studies for evaluators)
- brokerage and relationship development between the government as the primary purchaser of evaluation in Aotearoa New Zealand and professional evaluators
- more regular national professional development opportunities, including an annual national evaluation conference, and regular training opportunities, and
- provision of professional support services.

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.

In New Zealand, there is a “flourishing of a proactive Māori political discourse”² that has flowed over into evaluation theory and practice. Kaupapa Māori evaluation theory and practice challenges and interrogates the political context of unequal power relations in New Zealand society, and similarly in the structures and relations that exist for evaluation. Continuing to look toward an Australian-based organization for our professional support and development no longer seemed tenable for New Zealand evaluators.

Distinctive to **anzea** is our commitment to the Treaty of Waitangi, to our *matakite*³ (vision), and to the *whakatauki* (proverb) ‘*He kura te tangata*’ (People are precious). The *whakatauki* reflects the regard that we have for the intrinsic value of a human being and for

¹ 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.

² Bishop and Glynn, cited in Pihama, Cram & Walker, 2002, *Creating Methodological Space, A Literature Review of Kaupapa Māori Research*, *Canadian Journal of Native Education*, 26:1, 30 – 43).

³ *We “look to the maunga”, we strive for excellence. We recognise and value the cultures of all of our peoples. We honour their participation and we seek genuine partnerships. Sharing exceptional skills and insightful knowledge, we seek to support their aims and aspirations for a healthy, prosperous and vibrant future.*

the contribution of each person to the well-being of their whānau / families, their communities and their environment.

Embracing these principles and values as an integral part of the association, establishes our uniqueness in ensuring the inclusion, participation and leadership of indigenous perspectives and worldviews in evaluation in Aotearoa / New Zealand.

Strategy and implementation

Strengthening the evaluation enabling environment:

The New Zealand public sector is often considered to be one of the 'early adopters' of results-based accountability structures and systems. New Zealand's public sector reforms beginning in the 1980s and continued through the 1990s are regarded as having enhanced public sector responsiveness and accountability, focusing public sector managers' attention on their performance.

Over the past 20 years there have been a number of initiatives aimed to achieve a greater focus on outcomes within the New Zealand public sector including:

- Chief Executive Forum – launched in 1993 as a platform to promote the idea of a strategic, longer-term outcome perspective
- Strategic Result Areas (SRAs) – a coordinating device launched in the early 1990s (and existing until the late 1990s) which aimed to foster coherence in policy, planning and operational activities by defining medium-term, government-wide priorities at Cabinet level
- Key Result Areas (KRAs) – set at departmental level and, as such, belonging to the prerogative of the chief executives
- Managing for Outcomes – where the focus of accountability was moved to the outcomes that the agency was intended to achieve, with the results of particular programmes being assessed against the wider outcome that was to be achieved, and
- More comprehensive sector reporting – beginning with the environmental sector in 1997 (Better Public Services, SSC, Treasury, Department of Prime Minister and Cabinet, New Zealand, 2011, p8).

In spite of many years of results or outcomes-based reforms, the wider enabling system for evaluation has not been all that strong or committed, as the more recent formation of a national evaluation association illustrates. One exception is in education, where evaluation has been well institutionalized. At compulsory and tertiary levels there are now agencies with evaluative oversight of educational quality and improvement. However, in the main, the collection of information on performance has largely been driven by accountability requirements, and there has been little demand for evaluative information for management decision-making or improvement. A recent survey of 1,700 managers across a range of government agencies found that more than a third of managers (38%) didn't have information that gave them a good picture of how they were doing and almost half (47%) didn't have information that helped them to understand how to improve their performance or the impact of their work on the public (56%) (Gill, D (ed.) *The Iron Cage Recreated: The Performance Management of State Organisations in New Zealand*, 2011.)

A step recently taken by the new national evaluation association, **anzea**, towards strengthening the enabling environment for evaluation in New Zealand has been the recent development of a set of evaluation competencies for Aotearoa / New Zealand. The approach taken by **anzea**, has been to ensure the competencies have the broadest application, i.e., enhancing the knowledge and demand for quality evidence by funders and commissioners of evaluation, as well as building the quality of the supply of evaluators to provide evidence.

Specifically, the framework of competencies was developed to:

- inform and guide sound and ethical evaluation practice in Aotearoa New Zealand, in a range of roles relevant to evaluation practice
- support the growth and maintenance of culturally competent evaluators and evaluations
- assist evaluators or evaluation teams to identify those competencies that are important in any given evaluation situation
- provide guidance to trainers, teachers of evaluation and tertiary institutions about the minimum or graduating standards for evaluators in Aotearoa New Zealand
- provide a basis for voluntary self-review by evaluation practitioners and organisations, and checklist to assist with professional development
- support the development of employment criteria or standards for various evaluation positions or roles
- 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
- increase public awareness and understanding about the dimensions that make up 'good' evaluation practice in Aotearoa New Zealand

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. Distinctive to **anzea** is our commitment to the Treaty of Waitangi, to our *matakite*⁴, and to the *whakatauki 'He kura te tangata'*. Embracing these principles and values as an integral part of the framework, and within this project (its process and outcome) is of vital importance, as it establishes our uniqueness as well as our leadership in ensuring the inclusion and participation of indigenous perspectives and worldviews in the development of evaluation standards, competencies and practices, and the integration of these perspectives into the profession.

Clearly identified by evaluators in the early years of the association's development, was a desire for a national association that could advocate and influence evaluation policy and practice in government within the wider enabling environment as well as at individual and institutional levels. This remains a strategic priority of the association, although there is still work to be done to unpack how advocacy might be interpreted in the New Zealand context – in particular how it fits into the broader **anzea** goals, i.e., what might be advocated, and what the means and resources involved in advocacy might entail.

Developing / strengthening a sustainable strategy to enhance individual capacities to conduct credible and useful evaluations:

The main focus of **anzea's** strategy for building individual evaluation capacities has been holding an annual conference and to support training and the development of local communities of practice within its regional branches. The annual 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. A key part of **anzea** conferences are annual Māori and Pacific caucus meetings that are held just prior to the conference. These caucus meetings are an expression of the importance New Zealand evaluators place on their responsibilities to the Treaty of Waitangi and the role of indigenous cultures to leading, contributing and participating in the development of New Zealand's systemic evaluation capacity.

⁴ *We "look to the maunga", we strive for excellence. We recognise and value the cultures of all of our peoples. We honour their participation and we seek genuine partnerships. Sharing exceptional skills and insightful knowledge, we seek to support their aims and aspirations for a healthy, prosperous and vibrant future.*

Strengthening equity-focused and gender-sensitive evaluation systems and evaluations:

As the recent UNICEF publication on equity focused evaluation notes, “equity-focused evaluation processes should be used to empower worst-off groups to the maximum extent possible, as well as to ensure that evaluation questions are relevant to the situation of these groups”⁵ Strengthening the equity focus of evaluation in the New Zealand is very much grounded in the historical context of colonization. In New Zealand, there exists a Treaty (The Treaty of Waitangi) that was signed in 1840 between the British colonial leaders and Māori tribes. It promised partnership, the right to self-determination and equity in regard to all aspects of citizenship. However, these promises were not forthcoming. More than 150 years of colonization of the Māori culture, language, structures, systems and land has impacted negatively on the equity and wellbeing of Māori people. More recently, successive governments have accepted that there is a need to resolve historical Maori grievances in accordance with the terms of the Treaty and have begun to recognize the need for redress and restitution to, at least in part, enable Māori tribes to strengthen their people, structures, systems, culture and autonomy.

anzea acknowledges the Treaty, as the founding constitutional document of New Zealand in its constitution. Some of the ways in which the association has sought to give effect to the principles of the Treaty (partnership, participation, and protection) have been as follows:

- The inclusion and representation of Māori on the anzea board is a constitutional requirement
- The leadership of key projects (such as the evaluation competency development project) sponsored by the association have had joint leadership responsibility between Māori and non-Māori members and board members
- Support for the development of indigenous evaluation methodologies and resources is a strategic priority for anzea, and one effort that can be easily accessed is the recent digest of indigenous New Zealand evaluation resources published by the association (http://www.anzea.org.nz/index.php?option=com_content&view=article&id=107&Itemid=115)
- Scholarships are offered at every conference for indigenous delegates to attend
- anzea Conferences are preceded by a Māori / indigenous meeting (hui), that is lead and attended by Māori and other indigenous colleagues
- Māori practices (tikanga) are embedded into the way anzea conducts its business, for example, all anzea meetings and anzea conferences are opened and closed using Māori protocols and language.

Bottlenecks/challenges:

One of the major challenges for the association has been ensuring our financial sustainability. The organization has three main streams of potential funding, member subscriptions, conference surpluses, and any other surpluses generated from workshops of other training events. The initial subscription was kept very low. The association has a strong equity focus, and wanted to ensure the association was accessible to as many as possible. More recently, membership fees have increased, and a strategy for attracting corporate membership has been developed. However, the income stream from membership subscriptions is still not sufficient to keep the association afloat. **anzea's** viability depends heavily on the surplus from its annual conference. At regional levels, events are run as much as possible on a cost neutral basis, so as to ensure accessibility by as many in the evaluation community as possible.

Another major challenge is that the association is mostly a voluntary organization, with only one part time paid position. **anzea** therefore relies heavily on the goodwill of many

⁵ Bamberger, M & Segone M (2011), How to Design and Manage Equity Focused Evaluations, UNICEF.

members who juggle the demands of full time employment, families etc., with their support for the implementation of **anzea's** strategy.

Key enabling factors:

As the Māori proverb reminds us, *He aha te mea nui o te ao? He tangata! He tangata! He tangata!* What is the most important thing in the world? It is people! It is people! It is people! The three things that have enabled anzea to make the progress it has made have been:

- people's commitment to the vision and purpose of the association
- people's unwavering support of the board, and the long term anzea strategy
- people's willingness to donate their time and effort to getting the work done.

Innovations and lessons learned:

Nothing is possible without the assent, buy-in, cooperation, enthusiasm and effort of lots of good people. When good people come together, and are able to collectively harness their motivation, drive, energy and skills, good things happen. Sustaining the momentum of giving and serving our profession will always require us to pay careful attention to the needs of the people we have developed our association for.

Next steps: anzea's plans for the future fall into three main categories:

1. Continuing development and strengthening of organisational capacity and infrastructure. A key part of this work will be to ensure our sustainability as a viable and vibrant organisation, able to support the needs of the Aotearoa New Zealand evaluation community, those affected by evaluation, as well as the broader enabling environment for evaluation.
2. Development and refinement of our member services. In particular anzea will focus our efforts on strengthening individual and organisational capacities to commission, do and use evaluation. This work will build on the work of the competency project, ensuring that we target the specific professional development needs identified by our member evaluators, as well as the needs of those institutional members to be able to develop and implement sound, effective evaluation policies and systems.
3. Support for the strengthening of the broader enabling environment for evaluation. In particular, this will involve a strategy of anzea promoting and creating opportunities for dialogue about evaluation, evaluation culture and thinking among institutional champions and leaders across New Zealand.