Foundation North
Learning Series ③

What have we learned about evaluating high-engagement funding for Māori and Pacific?

FOUNDATION NORTH
Te Kaitiaki Pūtea ō Tāmaki ō Tai Tokerau

What have we learned about evaluating high-engagement funding for Māori and Pacific?

Foundation North's Māori & Pacific Education Initiative

Contents

I	**Introduction**	**4**
	Background	5
II	**The Kinnect Group's approach to developmental evaluation**	**8**
	Why developmental evaluation?	13
III	**Data collection**	**20**
	Economic analysis	20
	Analysis of educational data	21
	Hui/fono/focus groups & interviews	21
	Review of administrative or project level data (individual and whānau)	21
	Regular face-to-face visits; project level evaluation capacity support	21
	Photovoice/testimonies from young people	22
	Digital impact stories	22
IV	**Learning and reflection on DE with Māori and Pacific**	**23**
	Matching the approach to the context	23
	There is as much learning for evaluators as there is for the projects and funders	24
	Organisational development and evaluation capacity building cannot be rushed	25
	Building internal evaluation capacity	26
	Evaluating Māori and Pacific initiatives	29
V	**Conclusion**	**32**
	It's all about relationships	32
	References	**34**

Tables

Table 1	Evaluative rubric for MPEI	11
Table 2	Educational outcomes framework	12
Table 3	Comparing developmental, formative and summative evaluation	13
Table 4	DE characteristics in practice in the MPEI evaluation	15
Table 5	A Māori cultural framework for developmental evaluation	17
Table 6	Multiple forms of data collection—MPEI projects	20

Figures

Figure 1	MPEI evaluation three levels of evaluation	9
Figure 2	MPEI evaluation cycles of evidence and learning	9
Figure 3	Multiple criteria used to assess value for investment	10
Figure 4	Collective vision for evaluation—MPEI projects	19
Figure 5	Non-profit organisational lifecycles	25
Figure 6	Cycle of learning and reflection in evaluation capacity building	27
Figure 7	Effectiveness rates for Kinnect in their role as "critical friends"	28
Figure 8	Level of successful engagement with providers by Kinnect	30

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1 Introduction

In 2006, Foundation North (known then as the ASB Community Trust) set about implementing a new and creative approach to solving the seemingly intractable problem of educational underachievement among Māori and Pacific[1] young people. The Māori and Pacific Education Initiative (MPEI) was a long-term, high-engagement model of funding by the Foundation of a range of providers engaged in innovative, community-led solutions. The Foundation also bravely committed to using a new evaluation approach–developmental evaluation. This report, by the evaluation team from Kinnect Group, shares the experience of funders, providers and evaluators learning about developmental evaluation, in the hope that others can learn, and that evaluation itself continues to "evolve to stay relevant, timely, and useful" in emergent, untested and dynamic environments.[2]

The many people the evaluators worked with over the past years have all had belief, faith and vision for a better future for the young people they are working with and their families.

Ahead of time, they haven't necessarily known what the best way to get there is, or how long it might take. But they have been prepared to take risks, to live constantly with change and uncertainty, and accept that they won't always get everything right. They have had to be adaptive, agile and eternally optimistic about the future they are creating.

Working with a funder willing to experiment, take risks and trust in the skills and expertise of the evaluators, while at the same time always being there to help make sense of puzzles and conundrums along the way, has been one of the most exciting, challenging and humbling experiences the evaluation team members say they have had. The experience has left no doubt that when evaluators, funders and communities trust that each has the best interests of the others at heart, great things can happen.

1 Originally, MPEI was named the Māori and Pasifika Education Initiative. Following discussion among committee members, the term "Pasifika" was replaced by the word "Pacific". While the term Pasifika is used in some contexts, the word Pacific was considered a more universal expression. Pacific is an English term and Pacific peoples in Aotearoa New Zealand rely on English as their common language, while also speaking their own languages within their own communities. (MPEI contributors & Hancock, 2012, p.4)

2 Srik Gopalakrishnan, Preskill, & Lu (2013) *Next generation evaluation*
(See References section for full source details—footnotes give short titles only)

Background

The Māori and Pacific Education Initiative (MPEI)

In the face of overwhelming evidence of long-term, systemic educational failure for Māori and Pacific young people, Foundation North (known then as the ASB Community Trust) set out in 2006 "to explore a new, transformational approach to philanthropy". The hope was that the new approach could go some way towards "overcoming educational underachievement in Maori and Pasifika communities" in Auckland and Northland. The cold, hard reality was that if left to continue, the wellbeing and prosperity of some Māori and Pacific communities was at serious risk; worse still, New Zealand's economic progress, social cohesion and national identity could be argued to be on the line.[3]

The Trustees of Foundation North set aside substantial funds, and committed to a long-term, innovative investment approach, that they knew would be risky and challenging for them, but necessary, if community-led solutions to problems were to be found. The Māori and Pacific Education Initiative (MPEI) vision—**Mā tātou anō tātou e kōrero, We speak for ourselves**—captures the essence of the initiative, that communities know what is good for them, and must be able to speak for themselves and make their own decisions.[4]

This report reflects on the learning about evaluation of high-engagement projects that occurred across MPEI. See other reports in this series for what was learned about the key components of Māori and Pacific education success, principles developed about high-engagement funding, and assessment of the overall value for investment of this initiative. (See www.foundationnorth.org.nz/how-we-work/maori-pacific-education-initiative/.)

3 MPEI contributors & Hancock (2013) *Nga Maumaharatanga: Māori and Pacific Education Initiative–Our journey of forging philanthropic innovation together*, p. 15

4 Kevin Prime, Chair of what was then ASB Community Trust, in Hancock (2009)

Early commitment to evaluation

Along with long-term funding for a diverse range of projects, Foundation North committed to evaluating the MPEI projects and processes, so that an evidence base about the value of its investment could be built, from which important lessons for future philanthropic efforts could also be learnt.

The MPEI approach was completely new and untested. For the first time ever, the Foundation was investing in a vision, funding multiple innovative initiatives, over five years, in different communities, with a diverse range of starting places, skills and capacities.

> *"We were working within the frame of uncertainty that inevitably marks any quest for social transformation. Community development initiatives often require enormous leaps at the front end. To find a way forward you must put your faith and trust in people, and expect to shape the journey with them as you go along together."*
>
> *Pat Snedden, former Deputy Chair*[5]

As Pat Snedden's quote indicates, the approach underpinning the MPEI was a relational one, where trust and faith in people was a foundational premise. Rather than following the well-worn path of having Trustees consider the evidence and make decisions about priorities and funding, the Foundation opted for an approach that put the power over deciding funding priorities into the hands of knowledgeable, well-respected Māori and Pacific educational and community leadership. A partnership was established early on between Trustees and two reference groups who were focused on Māori and Pacific educational aspirations.

> *"The Trust sought from the outset to establish a working partnership with members of the reference groups that would enable them to shape the development of the MPEI and their role in it."*[6]
>
> *Kristen Kohere Soutar, former Trustee*

The initiative's development from the outset was highly organic and emergent. Nothing was predetermined except the focus on lifting educational achievement for Māori and Pacific young people. The complexity of what lay ahead, in order to realise the far-reaching vision, was acknowledged, as was the inevitability of a journey that would be full of ups and downs.

5 MPEI contributors & Hancock (2013), p. 23

6 MPEI contributors & Hancock (2013), p. 28

In spite of this uncertainty, Foundation North was committed to evaluation.

> *"We resolved to undertake an organic process, even if it led us into a cul-de-sac with nothing to show for our enterprise. We were determined to evaluate each step of the journey and put ourselves on the line."*[7]
>
> *Jennifer Gill, CEO*

The rationale for a developmental evaluation approach

Foundation North was clear it needed an evaluation approach that aligned with the far reaching vision, the complexity of the initiative, the emergent and organic process of development that was to occur, the commitment to collaboration and capacity development, and the importance it placed on trusting people and building relationships. It also valued an approach that would "harness critical enquiry, count what's countable and situate MPEI projects in relevant literatures to distinguish their contributions".[8] The Foundation eventually settled on a developmental evaluation approach.

> *The overall purpose is to develop an appropriate and flexible evaluation framework that will support the developmental journey of successful applicant groups, determine and assess measurable outcomes and deliver a credible evidence base for MPEI.*[9]

Foundation leadership and staff knew they wanted an evaluation approach that was responsive and flexible and that aligned with the initiative's underpinning principles and vision.

They had heard about developmental evaluation. Frances Westley, Brenda Zimmerman and Michael Quinn Patton's book *Getting to Maybe* (2007) had made it onto the reading list of a growing group of social entrepreneurs in New Zealand. Frances and Michael had also visited New Zealand, so a number of people had been exposed to the concept of developmental evaluation and it sounded like the kind of approach needed for the MPEI.

7 MPEI contributors & Hancock (2013), p. 18

8 MPEI contributors & Hancock (2012) *He Akoranga He Aratohu: Māori and Pacific Education Initiative lessons to guide innovative philanthropic and social practice*, p. 33

9 MPEI contributors & Hancock (2012), p33

II The Kinnect Group's approach *to developmental evaluation*

The MPEI evaluation set out to (i) support the innovation and development of each of the funded projects; (ii) support learning about the development of a high-trust, engaged form of philanthropic investment; and (iii) ensure there would be regular, systematic, data-informed feedback to Foundation North Trustees and the MPEI providers, about progress on each of the projects as well as progress towards achieving the vision and aims of the initiative overall.

Three levels of evaluation

There were three levels of evaluation that applied to the MPEI:

- evaluation that supports the development of innovation at the project level
- evaluation of the Māori and Pacific Education Initiative overall
- evaluation that contributes to the learning and development about engaged philanthropy, with a particular focus on what works for Māori and Pacific.

Figure 1 summarises the three levels of the MPEI evaluation and the evaluation questions that were started out with. With multiple system levels in the MPEI evaluation, the approach was cyclical, engaging in ongoing, iterative cycles of evaluative thinking, questioning and gathering of evidence at each level of the system.

Figure 2 illustrates the different cycles of probing, sensing, learning and questioning that were undertaken as part of the evaluation process.

Figure 1: *MPEI evaluation – three levels of evaluation*

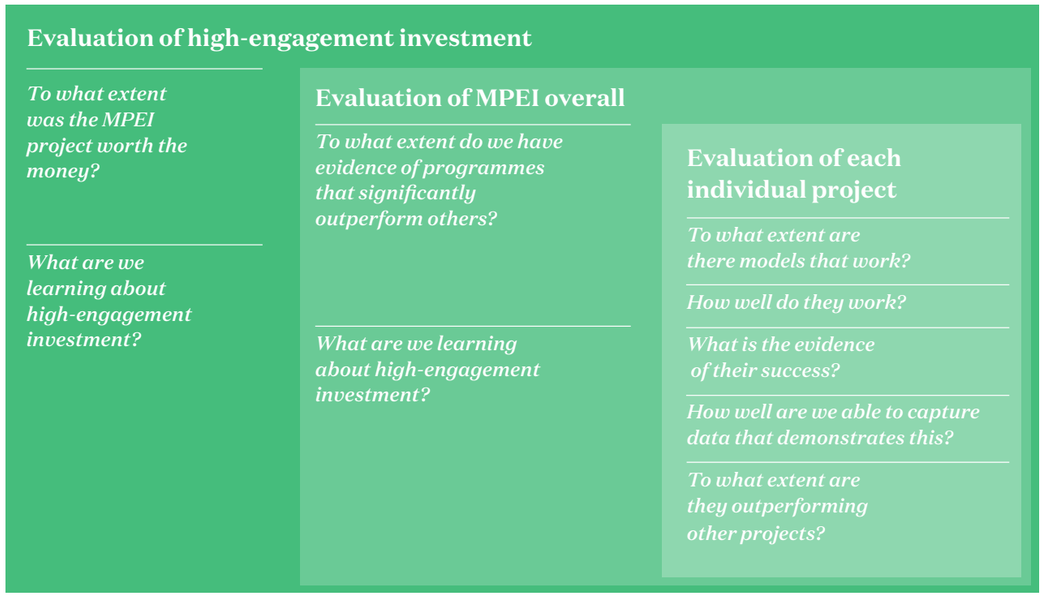
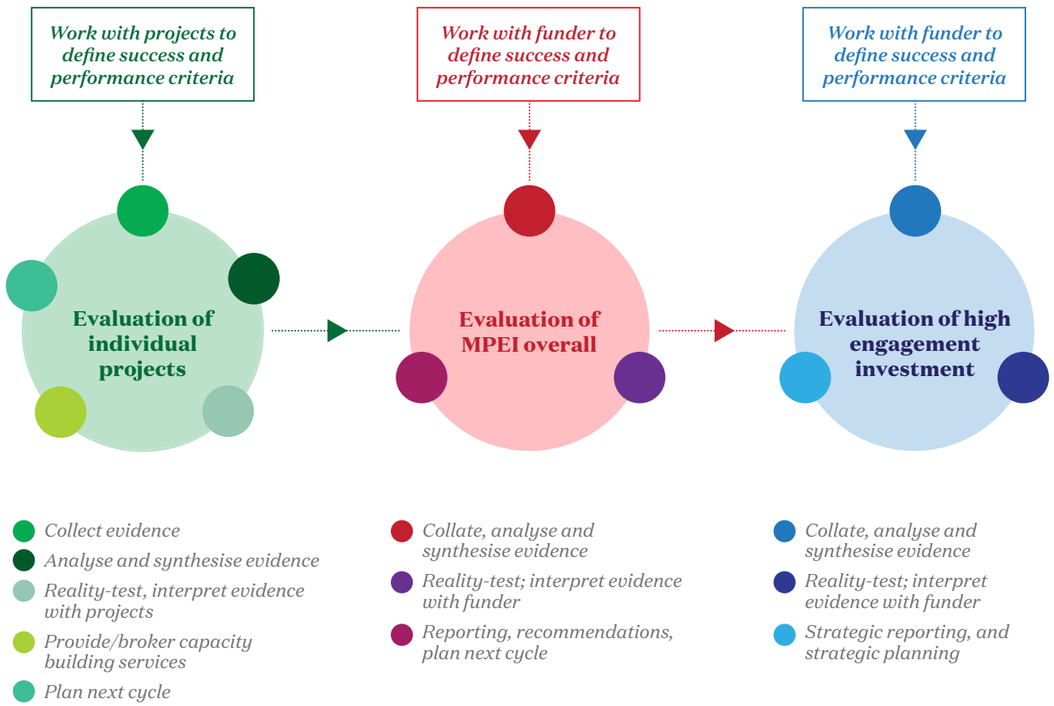


Figure 2: *MPEI evaluation – cycles of evidence and learning*



Evaluative performance

Foundation North's investment in the MPEI was significant, so it was important that an evaluative performance framework was developed to support the judgement about the value of its investment.

Early on, the evaluators from Kinnect Group worked with a group of Trustees to define, in their terms, what it would look like if the MPEI was highly effective. This process resulted in the development of a performance framework that was used throughout the evaluation. The framework identified seven strategic evaluation criteria and the levels of performance that were expected by Trustees on each of these criteria. **Figure 3** and Table 1 outline the criteria and performance framework that were developed for the evaluation.

In **Table 1** are set out the levels of performance for each of the strategic evaluation criteria that were developed with Trustees early on in the evaluation process.

Figure 3: *Multiple criteria used to assess value for investment*

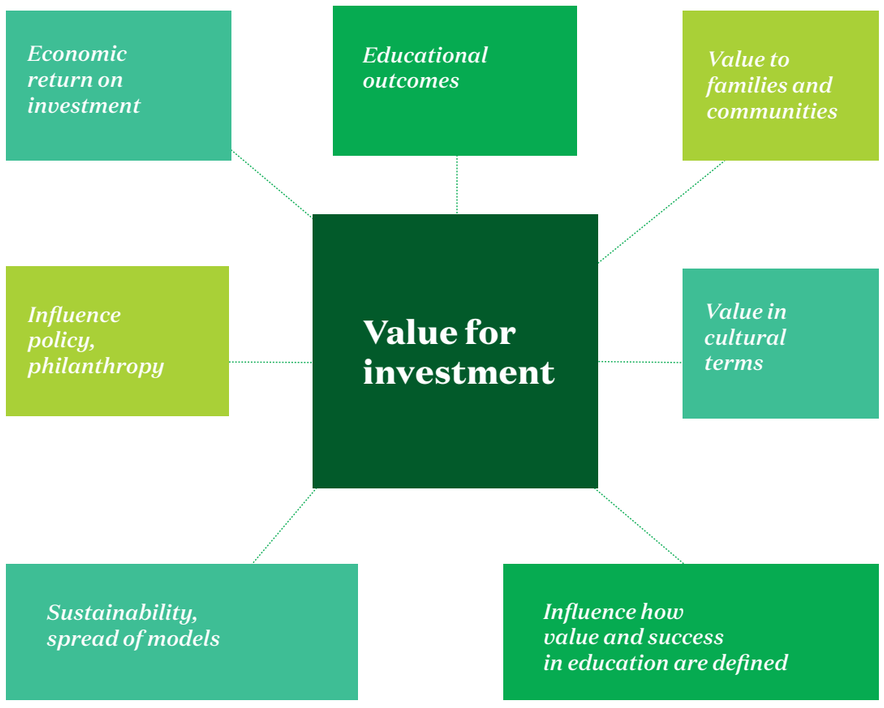


Table 1: *Evaluative rubric for MPEI*

Highly effective	ALL of the conditions for *developing effectiveness* are met and, in addition: ✕ The vast majority[10] of projects show educational outcomes[11] at least as positive as those achieved by pre-existing exemplar Māori/Pacific education programmes.[12] ✕ Virtually all projects achieve outcomes that their families and communities widely value. Māori and Pacific communities endorse and celebrate the success of these models for the contribution they make to realising their educational aspirations. ✕ There is clear evidence about why and how the models work for their target populations, including validation of the role of culture and the specific Māori/Pacific cultural elements that matter in this context. ✕ Foundation North is a recognised and respected leader, innovator and influencer of education policy and/or philanthropy. ✕ Government/communities (eg, schools, iwi, and others) implement successful models pioneered through the MPEI. ✕ Other philanthropic organisations and/or government(s) recognise the value of the high-engagement approach, and seek to learn from Foundation North. ✕ The MPEI influences the focus of education in New Zealand, for example, how value and success in education are defined.
Consolidating effectiveness	ALL of the conditions for *developing effectiveness* and ANY of the conditions for *highly effective* are met.
Developing effectiveness	ALL of the conditions for *minimally effective* are met and in addition: ✕ Government (for example, Ministers or departments) or communities (including schools, iwi, others) show an interest in the models OR the MPEI enables Foundation North to engage in other significant policy dialogue that otherwise would not have been possible. ✕ Learnings from the high-engagement investment are identified and acted upon. There is evidence of ongoing refinement and improvement of the funding approach.
Minimally effective *(basic requirements; "only just good enough")*	ALL of the following conditions are met: ✕ The majority of projects show better educational outcomes than previously achieved with Māori and Pacific children of equivalent year groups within the communities served by the projects. ✕ The majority of projects achieve outcomes that their families and communities value. ✕ The overall outcomes achieved through the MPEI investment (such as educational outcomes, associated social and economic benefits, and/or other benefits of value to the funder) are commensurate with the overall level of investment. ✕ There is a clear rationale to support why and how the models are intended to work–including the specific Māori and Pacific cultural elements that matter in this context. ✕ At least one project is able to secure external sustainable funding.
Ineffective	ANY of the conditions for *minimally effective* are not met.

10 In this rubric, *virtually all* means close to 100% with a few reasonable exceptions, *vast majority* means usually three-quarters or more, *majority* means usually half or more, *at least some* means more than just a few (numbers are practically, not just statistically, significant)

11 Educational outcomes are defined in Table 2

12 Possible exemplars for consideration include, but are not limited to, United Māori Mission & Auckland Grammar School initiative funded by ASBCT, Hato Petera, Te Aute

Educational outcomes

For the MPEI evaluation overall, educational outcomes were interpreted broadly, using descriptors adapted from those used by the Ministry of Education. Each project was given the opportunity to define each of these domains for themselves in contextually specific ways.

Table 2: *Educational outcomes framework*

In this evaluation, educational outcomes[13] include improvements in ANY of the following:	
Cultural confidence and identity	For example, students are confident in the Māori/Pacific world as well as the mainstream worlds of education and work; students feel good about being Māori/Pacific at school and in other educational settings; teachers and students incorporate Māori and Pacific culture, knowledge and understandings into different subjects and connect learning activities to students' family and community.
Whānau/family understanding and engagement	For example, family are made to feel welcome in the school; have an increased presence at school; are participating in school committees and activities; engaging with teachers about their children's education.
Attitudes and aspirations of students, teachers, whānau	For example, teachers pronounce students' and families' names correctly; increased rapport and trust between students and teachers; students actively participate in school activities; are being offered and taking up more extra-curricular or leadership opportunities; lift in career aspirations; and researching career options.
Student engagement and retention	For example, staying in school longer; reduction in unexplained absences; students want to be at school; are happy to be at school; come to school prepared for learning; are leading their own learning such as proactively pursuing further learning over and above the basic course, or doing additional work to grow their own knowledge in support of their interests.
Literacy and numeracy	For example, improved AsTTle, SAT, PAT results; students', teachers' and parents' observations.
Academic achievement	For example, NCEA/Cambridge results; AsTTle, SAT, PAT results; awards; entry to tertiary education or other opportunities.
Employment, training and further education	For example, MPEI enables students/family members to progress to employment, training or further education opportunities that would not otherwise have been possible.

13 Educational outcome definitions adapted from Wehipeihana, King, Spee, Paipa, & Smith (2010) *Evaluation of He Ara Tika*

Why developmental evaluation?

Developmental evaluation (DE) is an approach to evaluation that aims to support innovative initiatives and projects to develop, using evaluative inquiry and feedback as a key tool of the development process.[14]
DE was developed and first described by Michael Quinn Patton. The approach offers a quite different way of engaging in evaluation to more traditional approaches. In **Table 3,** some of the characteristics of developmental evaluation are compared with formative and summative evaluation.

Table 3: *Comparing developmental, formative and summative evaluation*[15]

Developmental Evaluation	***Formative Evaluation***	***Summative Evaluation***
Initiative is in development, exploring, innovating, creating	Initiative is forming and refining, improving, learning, and laying down processes and procedures	Initiative is stable and well established
Innovators are experimenting with ideas, activities, approaches, relationships & roles	Core elements of the initiative are taking shape. Still a need to refine and improve many aspects	The approach and activities are now well established and "known" among all involved
There is a high degree of uncertainty about what is likely to work & for whom	Outcomes are more knowable and there is growing sense of confidence about achieving them	There is much more certainty about how, and how well the initiative contributes to key outcomes
New questions, issues, successes & challenges continually emerging	There is more certainty about the context in which the initiative is operating	The initiative is potentially ready for scaling or adapting to other contexts
What is it? What is emerging?	***How well is it working?***	***How valuable is it? Is it worth continuing & funding?***

14 Patton (2011) *Developmental evaluation*

15 Adapted from a presentation by Kathy Brennan at the *Next Generation Evaluation: Embracing Complexity Connectivity and Change* conference, November 2014. See also Preskill & Beer (2012) *Evaluating social innovation*

The process of innovation is by its very nature complex and turbulent. Things are changing all the time, people and systems are experimenting and continually responding to new situations and information as developments occur, and the process of adaption and refinement is ongoing. Ideas and solutions emerge from dialogue and collaboration, in a relatively fast-paced environment.

In this sort of environment, evaluation also has to be:

- Dynamic and emergent—able to flexibly fit the changing circumstances, skills, knowledge and capacity of projects.
- Responsive to context—cognisant of the historical and cultural contexts of programmes, as well as the fast-paced developmental context in which the projects were operating.
- Able to operate at different levels of the system—the evaluation approach needed to build evaluation capacity within the projects as well as be able to say something about the worth and value of the MPEI overall.
- Participative—people in the MPEI projects and at Foundation North wanted to feel part of the evaluation process. This was a high-stakes initiative for them, and they didn't want to be at arm's length from the evaluation.
- Transparent, relational and use-orientated—just as the initiative was founded on relational premises, so too should be the evaluation approach. A "no surprises", high-trust approach was what was wanted by the funder.

The Foundation was clear that these were all characteristics of the kind of evaluation wanted. **Table 4** provides a brief summary of how, in the MPEI evaluation context, these characteristics were interpreted.

Table 4: *DE characteristics in practice in the MPEI evaluation*

Developmental evaluation (DE) characteristic	*DE in practice*
Dynamic	• We began with an expectation that the models of change, at each level of the MPEI system, would keep evolving, with key contributors and influencers changing and emerging • Our evaluation design was intentionally dynamic, with the team designing and redesigning as needed • Team members keep our eyes and ears open, paying close attention to what is going on in the system—keeping as up to date as possible with what's happening around us.
Responsive to context	• Across each of the projects, we understood that we need to use multiple strategies, cycle times, horizons, dimensions, and key informants • Our analysis and findings are sensitive to context, carefully tailored and explicit about their meaning "in context".
Transparent and use-orientated	• We work in an open and transparent way with all our stakeholders, making our information available for projects to view and feedback about • Our evaluation planning and reporting is designed from the outset with use in mind—for projects, for the funder's staff and management, and for Trustees.
Integrated and participative	• We set out to try and make our evaluation process and design as much a part of the programme as possible • We work to involve participants in all aspects of the evaluation process • Our evaluation planning and process co-evolves with the participation and input of key stakeholders.
Emergent	• Our approach is adaptive, matching what we do to the developmental stage of the project, organisation or wider system • In order to be responsive to emergence, we intentionally set up processes for keeping in touch with and tracking patterns of change over time.

DE—it's relational

Much like the foundational premise of the MPEI, the evaluators' practice of DE begins from a cultural and relational ethic of first taking care of relationships. The approach recognises that relationships are the primary or pivotal philosophical and practical change-maker.[16] This approach recognises that it is within relationships that change happens or as evaluator Nan Wehipeihana says, "Relationships are the business".[17]

Underpinning developmental evaluation practice are the relationships made with the people being worked with. Caring and respect, reciprocity and collaboration, as well as the creation of opportunities to mutually learn and grow, are all aspects of the relationships that become interwoven during a developmental evaluation–and these become integral to the quality and effectiveness of the evaluation and the programmes.

In a developmental evaluation, it's not just the programme theory, logic models, evaluation design, and data analysis that matter for evaluation quality and effectiveness, but also the relational quality of the contexts in which the evaluation is implemented.[18]

The roles and responsibilities of developmental evaluators are quite different from evaluation roles in more traditional forms of evaluation. In a developmental evaluation, the evaluator is not a dispassionate observer; rather, the evaluation begins from a position of support for the kaupapa or vision of an initiative; the evaluator's job is to support the innovation to develop. But the evaluator must also be able to have courageous conversations, about what's actually happening, how well it's happening and what this might mean for the next decision or action taken. The evaluator's job is not to tell people (ie, the projects or the funders) what to do; it's to support them to think evaluatively and critically about what they are doing, how well they are doing and what the next step might be.

DE in Māori and Pacific contexts—*informed and supported by cultural frameworks and understandings*

Māori and Pacific theory and frameworks informed and supported the MPEI developmental evaluation. The DE team consisted of Māori, Pacific and Pākehā evaluators who all recognise that cultural ontologies, epistemologies, nuances, meanings and metaphors, customs and beliefs impact on methodology, methods and practice.[19] The evaluators worked together to continually reflect on and challenge practice to ensure engagement in evaluation that would benefit Māori and Pacific communities, and not perpetuate historical experiences of negative or disempowering research and evaluation practice.

Table 5 provides an example of how Māori cultural dimensions have been interpreted in the DE practice within the MPEI evaluation.

16 Anae (2010). Research for better Pacific schooling in New Zealand: Teu le va—a Samoan perspective

17 Wehipeihana (2011) Workshop on *Developmental evaluation—A practitioner's introduction*

18 Abma & Widdershoven (2008) Evaluation and/as Social Relation

19 Anae (2010)

Table 5: *A Māori cultural framework for developmental evaluation*

Māori cultural dimensions	***Dimensions (in English)***	***DE application***
Kaupapa	Philosophy/ vision/purpose	✕ The models, pathways and theories of change for each project are based on the underpinning cultural philosophies and practices
Horopaki	Context	✕ Taking account of the funding environment, Māori and Pacific provider development, as well as wider indigenous/Treaty/political changes ✕ Ensuring the DE team was culturally capable to be responsive to the context
Whakapapa	History/ background	✕ Respecting the history of each project as well as the wider MPEI ✕ Documenting the journey—the beginning as well as the ups and downs and forks in the road
Tikanga a iwi	Worldview	✕ Taking account and privileging of diverse Māori and Pacific realities; ie, Māori and Pacific people operating in different places and contexts and the different perspectives and needs of each
Ngā ūaratanga	Values and beliefs	✕ Each of the project's own values and belief systems provided guidance and grounding for the DE team's decisions about all evaluation tasks and directions; for example, all evaluation learning opportunities and capacity building were grounded in culturally relevant examples and experiences wherever possible
Kawa and tikanga	Protocols and rituals	✕ Māori and/or Pacific protocols were observed throughout the evaluation process, such as formal welcoming processes, acknowledgement of ancestors, spiritual blessings etc ✕ Provider voices were honoured and privileged in the reporting and presentations about the programme
Ngā pūrakau	Storytelling	✕ Validation of storytelling was made in multiple ways throughout the DE process, such as use of stories of most significant change (MSC), video, hui (group meetings), infographics, performance stories
Whanaungatanga	Relationships and connections/ systems thinking	✕ Taking time to build relationships up front, with all key stakeholders; ensuring ongoing opportunities for providers, funders and evaluators to come together to share and strengthen connections, and build relationships
Tika, pono, aroha	Rights and responsibilities truth and love	✕ Recognising the roles of key team members, the responsibilities and accountabilities that each of us have—to providers, to one another (checking, discussing, debating what's right, in whose eyes?) ✕ Cultural translation—maintaining the integrity of information/the stories that are given to us from providers. Caring about what happens, doing things with head and heart and "in spirit" ✕ Going beyond the call of duty
Tino rangatiratanga	Self-determination	✕ Giving authority (mana) to Māori and Pacific providers and communities to decide what matters and what's important ✕ Working to ensure that data was useful/meaningful for programme development ✕ Giving effect to Treaty principles, such as working towards ensuring the programme funding was protected, working in partnership with the funder and the providers, ensuring ample opportunities for participation in strategic and tactical decision-making ✕ Non-indigenous stakeholders have guesthood status. Non-indigenous perspectives take a supportive back seat where appropriate

Adapted from Pipi (2012)

Kaupapa Māori is a "touchstone" for indigenous research and evaluation approaches in Aotearoa New Zealand. The evaluation practice in the MPEI evaluation was informed by the long and rich history of kaupapa Māori research theory and practice. A core tenet of kaupapa Māori research and evaluation theory and practice is the struggle for autonomy over cultural wellbeing and survival in pursuit of the aspiration to succeed as Māori.[20]

The vision and intent of MPEI was very much aligned to the political dimension of a kaupapa Māori approach. Kaupapa Māori approaches have made a major contribution to shaping contemporary Māori educational organising and activism that aspires to "re-establish learning environments that are culturally specific and benefit diverse whānau, hapū and iwi".[21] The MPEI set out to support Māori and Pacific communities to develop culturally relevant and effective educational choices for Māori and Pacific young people and to challenge systemic inequality. Foundation North expected that Māori and Pacific concepts, values and worldviews would underpin and inform the ideas and the development of projects. And therefore, it was essential that the evaluation also be informed by Māori and Pacific cultural knowledge systems, beliefs and values.

In contemporary Aotearoa New Zealand, the field of evaluation has emerged and been informed by Western knowledge systems, beliefs and values; and there are many funders and decision-makers who are most comfortable with the approaches that fit the Western paradigm of "evidence-based" science and knowledge. The challenge in the MPEI evaluation has been to "harness the energy" from Māori, Pacific and Western evaluation knowledge systems; that is, to recognise them all, allow them to inform each other satisfactorily and appropriately, and demonstrate that they are valued in the overall synthesis of findings.[22]

Early on in the evaluation journey, the evaluation team gathered the staff of all the MPEI projects together, and asked them what vision they had for evaluation.

They told the evaluators it was important that they:

- collaborate with them to make a difference
- help them build their evaluation capacity
- keep things simple
- are there when needed
- understand that they are all unique, there is no "one-size-fits-all"
- look hard for the "difference that makes a difference".

Opposite is a graphic summary of their vision for evaluation.

Figure 4: *Collective vision for evaluation—MPEI projects*

20 Interview with Smith (2012) on Kaupapa Māori—The dangers of domestication; see also presentation by Wehipeihana & Pipi (2014) on Indigenous Evaluation

21 Barnes (2013) *What can Pākehā learn from engaging in kaupapa Māori educational research?*, p. 6

22 Macfarlane (2012) "Other" education down-under: Indigenising the discipline for psychologists and specialist educators

III Data collection

Another challenge for the evaluation was to be able to ensure the data collection process, over several years, effectively and cumulatively built a robust performance story with sufficient evidence against each dimension of the performance framework, so that there would be a solid enough basis for saying how effectively the initiative was unfolding, as well as how effective it was overall. It was quite intentional and deliberate to ensure there were multiple sources of evidence for each project, and for each of the evaluation criteria. **Table 6** provides an overview of the range of data used for each project.

Economic analysis

An important part of the evidence base was the collection and analysis of the economic contribution or value of the MPEI investment, at project and initiative level.

A mix of economic methods was used, with indicators tailored to the specific nature of each project.

Table 6: *Multiple forms of data collection --MPEI projects*

MPEI Projects	*Economic analysis*	*Analysis of educational data*	*Focus groups/ interviews*	*Review of administrative data*	*Quarterly visits*	*Photovoice/ testimonies from young people*	*Digital impact stories*
C-Me	√	√	√	√	√	√	√
Sylvia Park	√	√		√	√	√	√
Rise UP	√	√	√	√	√	√	√
Ideal Success	√	√	√	√	√	√	√
Leadership Academy	√	√	√	√	√	√	√
Unitec		√	√	√			
High Tech Youth Network	√			√	√	√	
Manaiakalani		√		√			
M.I.T.E.			√	√	√	√	

Analysis of educational data

The MPEI was focused on educational success for Māori and Pacific young people. The funded projects spanned from primary school through to tertiary education. Each funded project had a different focus population, and quite unique and different understandings about how they interpreted educational achievement. Even though the evaluation began with a very broad definition of educational achievement, it became clear reasonably early on that there was still no possibility of establishing a common measurement approach across the initiative to track educational progress and outcomes.

Therefore, specific project-based, educational data were collected for each project, and tracked over the term of the initiative. Some of the projects that were located in schools already had quite well developed data collection and analysis systems in place. For many of the community based projects, the collection, analysis and ongoing tracking of educational data was challenging.

For example, in several of the projects, pivotal concepts such as “be Māori” or “flourishing women” were difficult to operationalise in measurement terms. In these instances, qualitative methods were relied on for the most part, and where possible more than one source of data was sought. The evaluators also worked with some projects to develop evaluative rubrics against which the mix of data was synthesised so that judgements about quality and value could be made.

Hui/fono/focus groups & interviews

A very important part of the data collection process was to hold hui and fono with the MPEI providers (as many as could be present), to gather their learning and feedback on key aspects of the MPEI journey. These hui were learning opportunities for all, they supported collaborative learning and insights to emerge and to be shared with everyone.

In addition, there were hui, fono, focus groups and interviews with whānau and young people in some of the projects to gather their feedback and insight from their perspectives on the impact of the projects on their lives.

Review of administrative or project level data (individual and whānau)

All projects were expected to regularly submit milestone reports to the funder. These were shared with the evaluation team. In addition, when team members visited projects, there were opportunities throughout the process to view and review a range of data being collected by the projects themselves to support their operations and delivery.

Regular face-to-face visits; project level evaluation capacity support

A key part of the methodology was regular face-to-face meetings and visits with all the projects, some more often than others. At these visits, evaluators met with project staff and management (and sometimes with young people) who shared with them the current status of project development progress, discussed any issues and concerns, and also made plans for ongoing data development, collection and analysis. Where evaluators could link projects with other needed knowledge or capacity support, they did so.

Photovoice/testimonies from young people

In the final year of the evaluation, the use of an adapted form of photovoice with the projects was discussed, in order to increase the "voice" of young people and whānau in the range of data being collected by projects, and also for the evaluation.

Photovoice is a participatory research approach that sets out to enable a range of "voices", that are often somewhat silent in traditional research or evaluation, to reach, and be heard by, decision makers. The idea is that the camera is like a "voice" and people can express themselves through the images they choose. Every photovoice project and story is different, but common to most projects worldwide is the effectiveness of the method to reveal and tell real-life stories, and represent the experiences and perspectives of people, in their own voices, to those who hold power over decisions or funding affecting the lives of those telling the stories.[23]

Whilst some projects enthusiastically engaged in the photovoice process, others were not so keen for a number of reasons, including time needed, resource constraints and their sense of appropriateness for their context.

Digital impact stories

For four of the projects, digital impact stories were also developed. These impact stories were focused on the significant impact of each of the projects from the perspective of whānau. Through the eyes and narrative of whānau and young people, the stories "brought to life" the changes that whānau believe have occurred as a result of their involvement in each of the projects.

Go to the Foundation North website (www.foundationnorth.org.nz) and individual project websites to see the digital stories.

23 Kuratani & Lai (2011) *Photovoice literature review;* see also Palibroda, Krieg, Murdock, & Havelock (2009). *A practical guide to photovoice: Sharing pictures, telling stories and changing communities*

IV Learning & reflection
on developmental evaluation with Māori & Pacific

Matching the approach to the context

The evaluators learned that **developmental evaluation is well suited to a high-engagement funding context**. When the MPEI began, the high-engagement approach to funding was new, and untested. But like many philanthropic organisations worldwide, Foundation North realised that continuing to use traditional philanthropic models was not going to solve the complex problems facing Auckland, Northland and New Zealand.[24] And because the Foundation was experimenting, they needed an evaluation approach that would fit with experimentation, emergence and a process that was going to organically unfold. They wanted to be able to capture their learning as well as be able to say something robust about the value of the MPEI investment overall.

The MPEI situation appeared to be a good match for a developmental evaluation. Developmental evaluation isn't right for all situations. DE is an evaluation approach that is focused on supported innovation in complex settings, but to be successful a suite of organisational and cultural conditions also need to be in place. For example, organisations need to be willing to commit the time to actively participate in the evaluation and to build and sustain relational trust with the evaluators. Respectful and trusting relationships underpin a DE, and ensure things stay on track during periods of uncertainty, ambiguity and turbulence. In a DE, there is no room for a more traditional "set and forget" evaluation management approach.

Organisations also need to be open to adaption, and have a real ability to make changes when they are needed. If adaptive capacity is lacking or constrained, it is really tough to be responsive to feedback and be truly developmental and innovative.

And finally, in order for DE to be a good fit for a situation, there needs to be more than lip service paid by all those involved to being prepared for making mistakes and failing, and learning from these situations.

The MPEI met all the conditions for developmental evaluation:

- **The situation was complex**—there were multiple parts to the system that the projects are working within, there were many organisations, diverse perspectives, no known solutions to the problems that existed, no single "truths" out there to find, although there was heaps of data and information available.
- The initiative's development from the outset was **highly organic and emergent**. Nothing was predetermined except the focus on lifting educational achievement for Māori and Pacific young people.
- There was, and continued to be, an **openness and willingness to collaborate**. From the outset, embedded within the initiative's design and development were principles of collaboration, co-design and community development. The approach underpinning the MPEI was a relational one, where trust and faith in people was a foundational premise. A deep commitment to the dynamics of relationships was modelled by the Foundation leadership, who actively invited deep discussion, participation and engagement on the issues of importance, within and across cultural lines.
- Foundation North has a **genuine commitment to learning**. It is open and eager to use data for decision-making, is prepared to share information, and trusts people to make sense of this information in their own contexts. People in the organisation show respect for individual and cultural differences, they ask questions, and learn fast, embracing challenges and mistakes, and using data for decision-making.

24 Srik Gopalakrishnan, Preskill & Lu (2013)

One of the really unique challenges of the MPEI developmental evaluation was that the evaluation team was applying the approach at project and strategy levels. They learned that the principles of building trusted relationships, openness and commitment to adaption and collaborative learning, respect for and faith in people's knowledge and expertise applied at both levels, but there was no such thing as a one-size-fits-all DE approach. Every context was different, and had to be navigated differently depending on the situation.

There is as much learning for evaluators as there is for the projects and funders

The evaluators learned that when engaged in a developmental evaluation, the evaluators do as much learning as everybody else. Nothing really prepares you for a developmental evaluation, you have to be open to emergence, to change, because everything is changing.

At the same time as supporting the evaluation process, the evaluators learned from the projects and the funder how to be, and how to act in their contexts. They came to realise that they had to work with the project rhythms and that the development pathway can't be timetabled as you might expect. "Sometimes you turn up at a project with your plan, and everything has changed since you were there last, and the project staff have a different plan for you," an evaluator commented. So they learned to "go with their flow" and treat every meeting as a data moment and learning opportunity:

> *We have come to understand that we need to be conscious of what is "front of mind" for organisations when we turn up. Whatever this is, it's often where a meeting or plan will end up going on the day, because this is what the projects want to talk about. So, we began to realise we needed to look for and find the learning in the moment.*
>
> *Evaluation team*

The evaluators also noted, "A salutary lesson has also been to not overestimate our importance to the project organisations. Sometimes we can be seen as annoying and intrusive, taking people away from what's really important. Evaluation isn't the first thing on everyone's mind!"

So the projects kept the evaluators on their toes, constantly adapting the plan and also their approach. One example of the ongoing adaption and adjustment of evaluation methodology was in relation to how progress on educational outcomes were reported. They began with the idea that a unifying or common approach to representing changes over time in—at the very least—educational outcomes might be able to be found. Even though funders loved the idea of a unified approach to reporting on changes over time, it was soon discovered that it is tough to get multiple different projects to agree to representing themselves in similar ways. In this case, they didn't manage it and abandoned the attempt to find a common "dashboard" of results. Each of the projects wanted to see themselves in the reporting, so the evaluators moved to a more tailored infographic approach to reporting about them. *(See the Foundation North website for examples of the infographics.)*

Organisational development and evaluation capacity building cannot be rushed

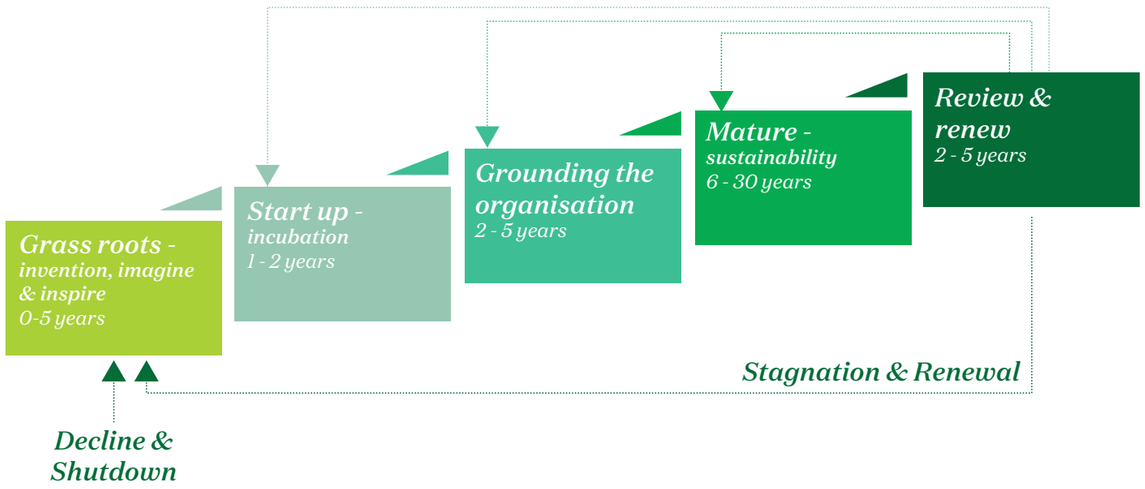
One of the other critical learnings of the developmental evaluation journey was a better understanding of the trajectory of organisational development that many new and innovative non-profit projects go through. There are stages and transitions of organisational capacity development that most community organisations go through at some point, and the evaluators learned that you can't necessarily rush this. For some, this might move along smoothly and faster, and others will be more up and down, and take longer. And it's not necessarily a linear pathway.

As **Figure 5** demonstrates, some will take longer than others at different stages, some will move reasonably smoothly through the different stages and transitions, others will get stuck in a particular stage for some time. Others will quite intentionally remain as small, informal, grassroots organisations and have no desire to grow. But even these organisations are likely to experience ups and downs, opportunities and setbacks along the way.

It's important that the leaders of innovative projects and organisations understand that the journey they are on has stages and phases, and also that they come to know what the "next steps" of the journey might be for them. This was one of the aspects of support the evaluation team found they were able to give projects that they hadn't initially expected to be the case.

However, the project organisations each have their own unique combination and interplay of organisational characteristics and dynamics, and being effective in supporting each of them to develop the capacity to become evaluative depended on a nuanced understanding of each project and organisation.

Figure 5: *Non-profit organisational lifecycles*



Adapted from Speakman Management Consulting and Simon & Donovan (2001)

This developmental pathway for projects and organisations also applies to evaluation capacity. In the earliest stages of development, having in place informal/manual processes of learning and evaluative reflection in small organisations may be entirely appropriate, but with growth and maturity, organisations become less able to cope or function properly with these manual systems, and there becomes a more urgent need to be more systematic about outcome frameworks, data collection, analysis and reporting.

However, for a new project to develop, refine and get evidence of impact—whilst initially five years seemed more than doable, the reality was quite different. Even basic monitoring was hard to set up for some projects at the outset, and continued to be a challenge throughout for some.

Developing the capacity to measure outcomes and impact is even more challenging, not a simple "off the shelf" process. For example, following up and maintaining relationships with graduates is expensive and time consuming.

Where the impact is even more intangible, and harder to quantify, such as with concepts and goals that are about shifts in consciousness and belief—like "knowing who I am" or "being rangatira" or "being Māori"—measurement is challenging and requires intensive effort to develop contextually specific and appropriate approaches.

Building internal evaluation capacity

Evaluation capacity can be thought of as a system of action or learning that is linked to the ability of organisations to enquire and engage in evaluative activity and practices.[25]

This system of evaluation capacity is made up of knowledge, skills, attitudes, structures, leadership, motivations, expectations and consequences. The use of evaluation and the sustainability of evaluation capacity building will, to a great extent, depend on the motivation and ability of people in organisations to take ownership, commit and engage in the effort.[26]
Figure 6 outlines the cycle of learning and reflection that can occur. It is widely acknowledged in the evaluation capacity building literature that the form and type of evaluation capacity that organisations have is unique to each context.

Across the MPEI providers, there was a really diverse range of provider "mindsets" or buy-in to evaluation capacity building. Some were immediately on board, recognised the importance of evaluation, prioritised their efforts to engage in it and were highly motivated to build their own capacity.

Others already had evaluation capacity and didn't really need support. Still others, whilst they recognised the importance of evaluation, struggled to prioritise it, and would have preferred the external evaluators to be more hands on, to actually do more of the evaluative work themselves.

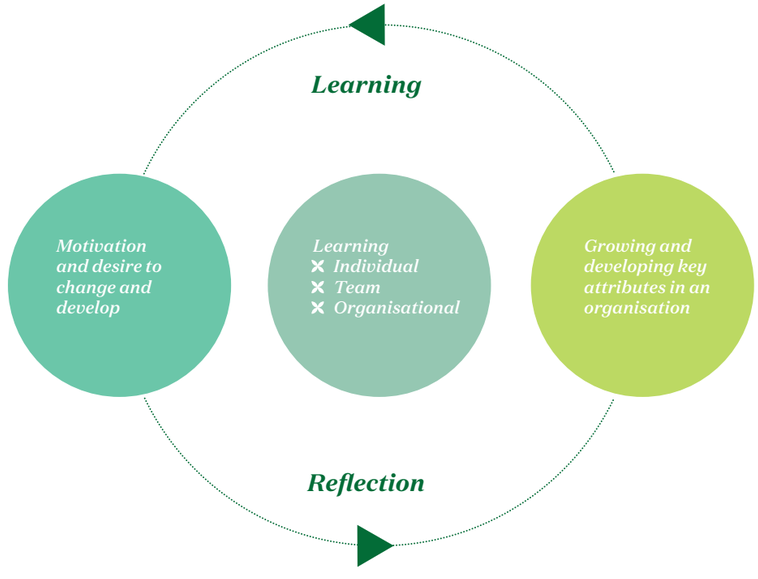
Not surprisingly, for some, the ultimate driver of their motivation and desire for evaluation capacity support was sustainability and ongoing funding.

A key learning is that just as there is no one-size-fits-all DE approach, there simply is not a one-size-fits-all approach to evaluation capacity building. It's a dance between doing evaluation with, building capacity to do evaluation as, and just doing evaluation for. It all depends on the context.

25 Preskill & Boyle (2008) A multidisciplinary model of evaluation capacity building; see also Cousins & Lee's (2004) review - Integrating evaluative inquiry into the organizational culture

26 Baser & Morgan (2008) *Capacity, change and performance: Study report*

Figure 6: *Cycle of learning and reflection in evaluation capacity building*



The approach evolved; however, some key aspects of evaluation capacity building that the evaluation team learned were important include:

- focusing on and prioritising our relationships with the key people in the organisations—as our relationships developed with the different projects and people, we came to know the different skill sets and knowledge that different people had, and gradually got better at working out who was best to contact for different evaluation needs
- committing to building a trusted relationship with each other over time
- having a mutual respect for each other's expertise, so we can pool our resources and harness our mutual energy and passions
- working collaboratively to co-produce tools, systems and practices that contribute to the outcomes that matter to the organisation
- having transparent and open dialogue with each other about what we are doing, and how it's working (or not)
- focusing on what is pragmatic and possible within the resources available.

The evaluation team commissioned a small independent evaluation of their evaluation approach (a meta-evaluation), gathering feedback from the MPEI projects. The feedback was very positive. Providers felt that the Kinnect Group provided consistent, clear and critical thinking that supported progress of the initiatives. They felt they were encouraged to see things through different lenses which helped them to define, review and channel their projects.

As a manager it is important to answer those critical questions—are we on track? I saw them as a middle man, a link between [Foundation North] and us. They gave us new ways to look at things, helped us develop interesting ways to present data.

Provider management

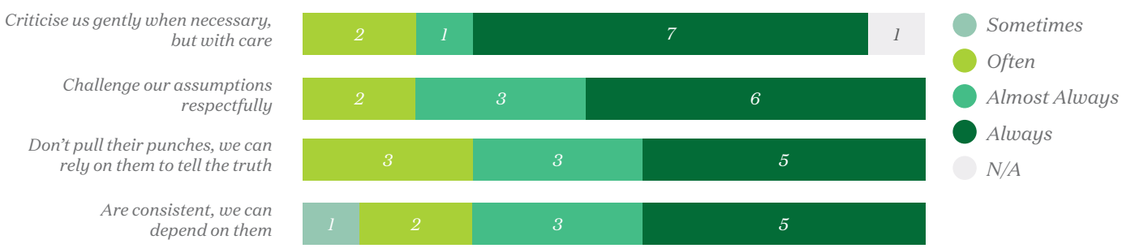
The evaluators' interactions with providers were perceived as constructive and they appreciated the solution-based approach they brought to their work. Advice given extended beyond evaluation support and guidance to additional information on topics that were relevant to the growth of the project.

I would always come away feeling lighter, it is important to us that what we are doing is working. We are striving for excellence, always looking to improve. Their evaluative minds supported that.

Provider management

Figure 7 summarises the ratings providers gave the external evaluation team on their effectiveness as "critical friends".

Figure 7: *Effectiveness rates for Kinnect in their role as "critical friends"*



Note: More than one person responded from the nine projects, so response numbers vary.

Evaluating Māori and Pacific initiatives

The evaluation of the MPEI posed a number of ethical, political and methodological challenges that were constantly visited and revisited throughout the evaluation process. On the one hand, the evaluation client was a "Tauiwi" client, that is, grounded in Pākehā/Western systems of knowledge, politics and power, albeit expressing a desire to support Māori and Pacific communities to determine the solutions for themselves. On the other hand, most of the MPEI projects were from, and of, Māori and Pacific communities. The evaluation team was commissioned to support capacity development within the projects, and also to evaluate the overall worth of the initiative's investment. So, the evaluation had to face two ways, it had to try and balance being client-facing as well as project-facing. And in this respect, the evaluation was going to have to walk in several cultural spaces, in the Pākehā, Māori and Pacific worlds:

We recognised from the beginning that we would be reaching across and straddling cultural divides, and that we had a responsibility to advance understandings on all sides where we could, at the same time questioning and potentially challenging systemic inequalities that do not support the aspirations of Māori and Pacific communities, given the vision of the initiative.

Evaluation team

There is now a considerable body of literature that points to what is generally considered good evaluation practice when undertaking evaluation in Māori and Pacific contexts.[27] Indigenous people express emancipatory, aspirational goals for themselves in this literature, as well as a strong desire for research and evaluation practice that is respectful and enriching for those participating in it.

However, there is only a small amount of literature that speaks to the challenges of undertaking evaluation in historically contested and highly politicised contexts in ways that might authentically and with integrity recognise the aspirations of key evaluation partners.[28]

The MPEI evaluation team comprised Māori, Pacific and Pākehā evaluators. Right from the outset, the team was faced with the political and ethical challenge of who should hold the MPEI contract? Their commitment, as a team, to evaluation that upholds Māori and Pacific aspirations and rangatiratanga was tested when it became clear that the senior Māori evaluator was not in a position to hold the contract in this instance. So it came to be that a senior Pākehā evaluator held the contract for an evaluation of a Māori and Pacific initiative—this was not an easy situation to reconcile, and one that they were constantly challenged about, from their evaluation peers as well as by people from some of the projects themselves. "In this instance, we made a choice to be tauiwi-facing; it was a decision we made collectively, in full knowledge of the 'thin line' we were treading."

27 Cram (2001) Rangahau Māori: Tona Tika, Tona Pono; see also Smith (1999) *Decolonising methodologies: Research and indigenous peoples; and Chilisa (2012) Indigenous research methodologies*

28 Jones with Jenkins (2008) Rethinking collaboration: Working the indigene-colonizer hyphen; see also Barnes (2013); and Cram & Phillips (2012) Claiming interstitial space for multicultural, transdisciplinary research through community-up values

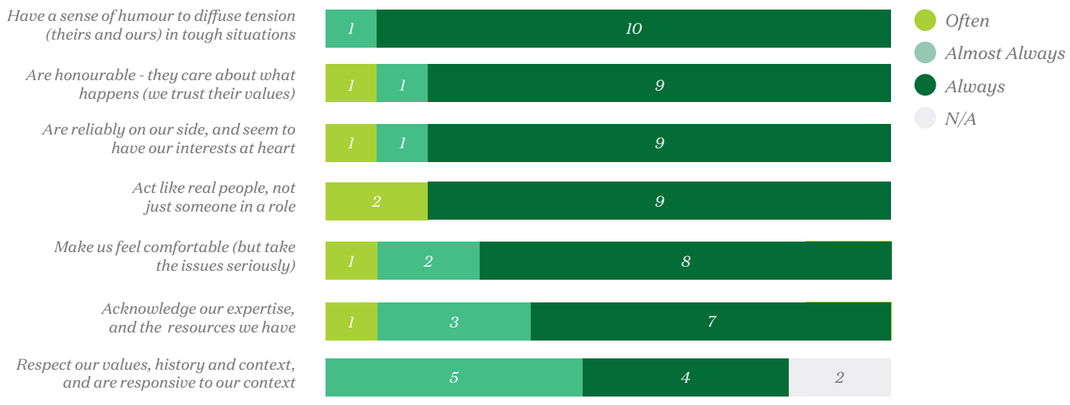
Lessons

One of the most important lessons reinforced over the course of the MPEI evaluation was the need to **demonstrate a commitment to building connections and sustaining relationships** with the Māori and Pacific communities that the evaluators were engaging with. The evaluators noted, "For us to have credibility in these communities, we needed to 'be seen' and be seen to be prepared to walk alongside them for the long term." Foundation North exemplified this point by ensuring there was a consistent, dedicated Māori face, who became known to all providers, and trusted to have their best interests at heart. For the evaluators, "We didn't get it right in every case. But wherever possible, we worked to try and give the communities the option of choosing their evaluators, and then sustaining a relationship with the same evaluators over the course of the project."

Another important lesson, similarly reinforced throughout the evaluation, was for the evaluators to **look to, and be guided, as much as possible, by Māori and Pacific principles, values, theories, frameworks and practices.** For example, meeting face-to-face is an important value for Māori and Pacific, so a key part of the evaluation methodology was the use of hui and fono.[29] At these hui and fono, people were given the opportunity to connect with each other, build their relationships, and share practice and experiences in culturally relevant ways. There was real benefit for everyone in ensuring these culturally grounded collective learning and sense-making opportunities occurred. As the projects were developing, there was so much to learn from each other, so ensuring the evaluation process contributed to this learning was important. But perhaps more importantly, the evaluation team noted that, "In the eyes of the MPEI providers, we demonstrated through the use of culturally grounded methodologies that we valued their histories, their knowledge, and their ways of doing things."

Figure 8 illustrates a summary of feedback received from providers about the nature of the evaluation team's engagement with them.

Figure 8: *Level of successful engagement with providers by Kinnect*



Note: More than one person responded from the nine projects, so response numbers vary.

29 Pipi et al. (2004) A research ethic for studying Māori and iwi provider success

Another important lesson reinforced during the MPEI evaluation was the importance of being able to **recognise the limits of our cultural capabilities, in different contexts**. There is simply no substitute for Māori and Pacific cultural expertise, leadership and knowledge when it comes to knowing and understanding what is going on in Māori and Pacific communities.[30]

Although some of the projects told the evaluation team that for them it was more important that the team brought evaluation knowledge and skills to the evaluation process, rather than cultural expertise, the evaluators said, "We found on a number of occasions that having limited relevant cultural capacity also limited the validity and credibility of our evaluative work."

For example, as part of evaluation capacity work with a Pacific project, the team encouraged the provider to gather feedback from their community about the quality and value of their project:

> ***However, we did not have a Pacific evaluator on the team at the time, and it became clear that the feedback process needed to be led by a Pacific evaluator for Pacific perspectives to be authentically and validly represented. This sparked an even more urgent quest to find a Pacific evaluator to work alongside us, as well as a determination to find ways to support the development of Pacific evaluation and evaluators as part of our evaluation project.***
>
> *Evaluation team*

30 Bell (2014) *Relating indigenous and settler identities – Beyond domination*

V Conclusion

It's all about relationships

The evaluation team highlighted that relationships were key to developmental evaluation:

> ***Through the MPEI developmental evaluation we learned that fundamentally, developmental evaluation is relational—it is through relationships that the evaluation process unfolds, and that learning and change happens. Relationships are not something the evaluator simply pays attention to, they are inextricably the core business of developmental evaluation.***
>
> *Evaluation team*

How they as evaluators are positioned to each other, and to programmes and funders, matters. "It is often more important what our histories and other relationships are, than what evaluation skills and knowledge we have, particularly in Māori and Pacific contexts."

In a developmental evaluation, the evaluators become part of the development and history of the initiative, and therefore an integral part of the knowledge, stories and memories that are shared about the initiative. The nature of accountability as evaluators becomes a critical aspect of the way of working; that is, evaluators need to critically examine and consider the many expectations of the relationships with those with whom they are engaging.

In the MPEI situation, navigating Māori, Pacific and Tauiwi contexts, the complexities of accountabilities and relationships took on cultural and political significance that were constantly in play. Positionality as Pākehā, Māori and Pacific evaluators to each other was already pretty complex, and added to this were relationships with each of the projects, and with the Foundation North staff and management.

> ***We have learned that there is no simple recipe for respectful relationships, no "best practices". Relationship building is an ongoing process that is fluid and unfolding. It requires commitment, attention, awareness and communication. There are ups and downs but through it all there are tremendous opportunities to work in solidarity and to make changes that will result in a more just world for present and future generations.***
>
> *Evaluation team*

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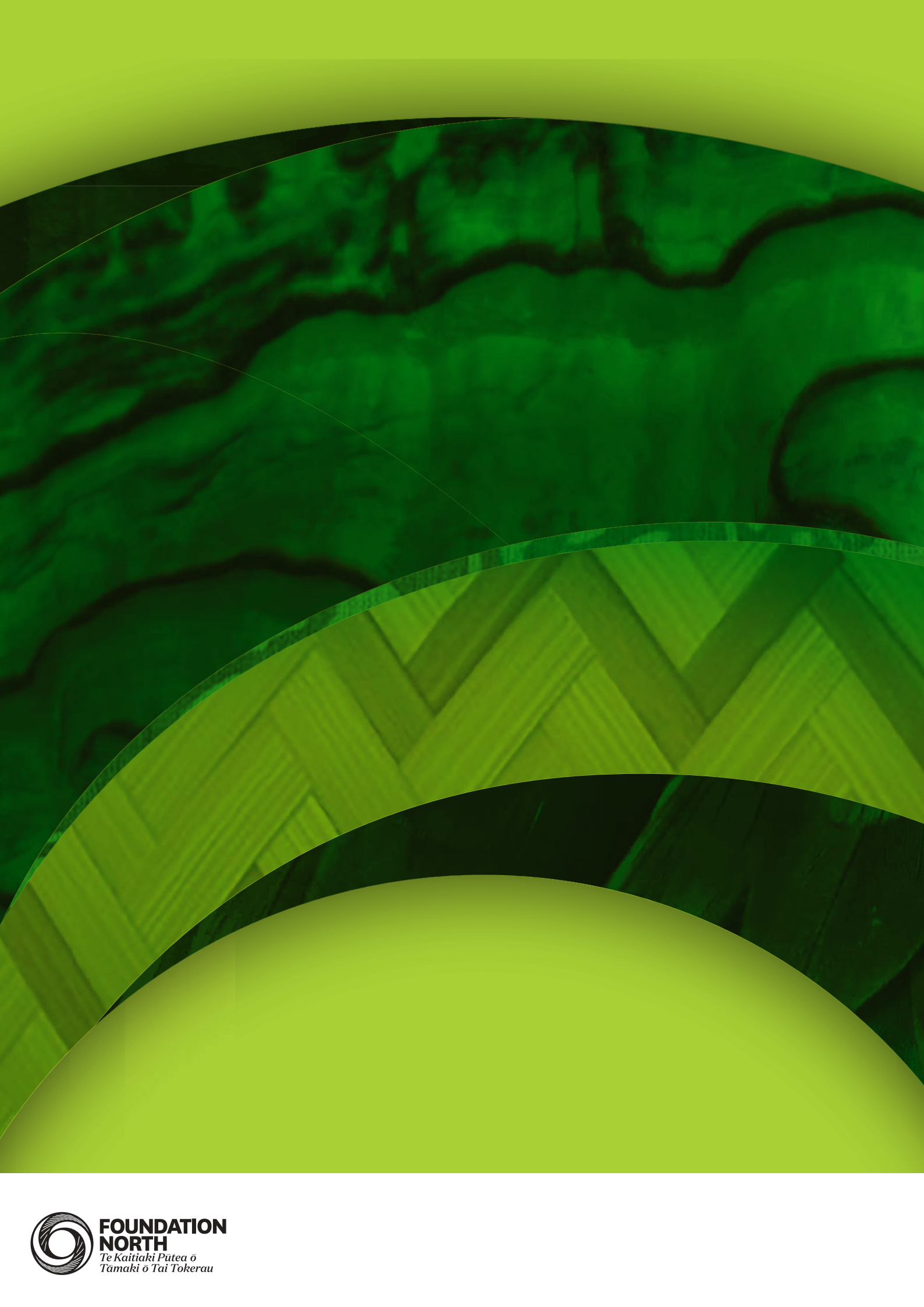

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