He Oranga Poutama Case Study: Applying developmental evaluation and systems thinking in indigenous contexts

Systemic approaches in evaluation
Frankfurt, Eschborn
25-26 January 2011
Nan Wehipeihana
Outline

• Case study context
• Why developmental evaluation?
• What is the object of the evaluation?
• What questions did the evaluation seek to answer?
• How did we go about answering these questions?
• What are the findings and lessons learnt to date?
• What is the potential of developmental evaluation in other contexts?
Context Overview

• Aotearoa New Zealand
• Population of approximately 4 million
• Māori (indigenous people) approx 14% of the population
• Treaty of Waitangi
• Māori disparity across all major indicators of education, health, employment and housing
Organisational context

• SPARC is a Government funded NZ ‘Crown Entity’
  – To “promote, encourage and support physical recreation and sport in New Zealand” (Sport and Recreation Act 2002)

• Key functions
  – Allocate funds and invest in partners to deliver results.
  – Promote and advocate the importance of participation in sport and physical activity.
  – Sector capability development

• Cultural responsibility
  
  To “promote and support the development and implementation of physical recreation and sport in a way that is culturally appropriate to Māori” (8(f) Sport and Recreation Act 2002)
Programme context

• Culturally based sport and recreation programme
• 12 organisations – 5 mainstream, 7 tribal/ Māori
• 2007-09 programme review resulted in a ‘re-visioning’
• New focus on culturally led and driven participation
• New strategic goal:

“to increase participation and leadership as Māori in sport and traditional physical recreation at community level”. (SPARC, 2008)
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<tr>
<th>FROM</th>
<th>TO</th>
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<tbody>
<tr>
<td>Increase physical activity of Māori</td>
<td>Increased participation and leadership ‘as Māori’ in sport and <em>traditional physical recreation</em> at community level</td>
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<tr>
<td>Historical investment in partners</td>
<td>Open and contestable application process</td>
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<tr>
<td>- primarily mainstream organisations</td>
<td>- primarily tribal organisations</td>
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<td>Programme outcomes and measures defined by SPARC</td>
<td>Programme outcomes and measures emergent and developed in consultation with providers</td>
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<td>Generic Māori focus</td>
<td>Māori Potential Approach and Framework Kaupapa Māori principles</td>
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<td>Generic programme monitoring</td>
<td>Developmental Evaluation approach</td>
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<td>1–year contracts</td>
<td>3–year contracts</td>
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Why Developmental Evaluation?
• Uncertainty around the new and innovative programme goal and vision
  – *Not sure what ‘as Māori’ participation would involve*
  – *Desire to explore data and make sense of feedback*

• No formal evaluation evidence about:
  – *What to expect* (emergent and unknown outcomes)
  – *No data available* (to measure key cultural concepts/variables)

• Complex environment
  – *Contracting economy, changes in programme contracting and delivery, organisational change and change in the political environment*

• Indigenous cultural context
  – *Draw on indigenous body of knowledge and methodological traditions* (use of narrative, metaphor, culturally responsive approaches)
Why developmental evaluation?

“A very real sense that traditional evaluation methodologies with fixed evaluation designs, prescribed outcomes measures and limited responsiveness to cultural context – would miss the mark.”

(Nan Wehipeihana, 2008)
What is the object of the evaluation?
• The system
  – *Participation and leadership as Māori*

• Within a boundary of
  – *Traditional Māori physical activity and sport*

• He Oranga Poutama aims to impact on the system through investment in:
  – *Development of community leadership*
  – *Opportunities for Māori to participate ‘as Māori’ in sport and traditional recreation and physical activity*
  – *Development of organisational and cultural infrastructure*
• **Boundaries**
  – *Internal to SPARC: He Oranga Poutama and ‘other’ SPARC programmes*
  – *External to SPARC: Other NZ agencies also fund traditional physical recreation*

• **Perspectives**
  – *SPARC organisational management and HOP programme management*
  – *Mainstream and tribal/ Māori providers*

• **Inter-relationships**
  – *SPARC investment partners who did not receive funding under the new programme investment criteria*
  – *Multiple levels within mainstream service provider organisations*
What questions did the evaluation seek to answer?
Evaluation questions

• How valuable are the He Oranga Poutama outcomes being achieved?
  – To what extent are the core programme outcomes being achieved?
  – To what extent are other valuable outcomes being achieved?
  – To what extent does the current HOP delivery approach represent a good way of achieving the outcomes sought by the programme and the community?

• What constitutes ‘as Māori’ participation in sport and recreation?
<table>
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<tr>
<th>DE Questions</th>
<th>Applied to He Oranga Poutama</th>
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<tr>
<td><strong>What?</strong></td>
<td>What does / might ‘as Māori’ look like in the sport and recreation sector?</td>
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<tr>
<td><strong>What’s being developed?</strong></td>
<td>What are other’s doing in the ‘as Māori space? What are the patterns of ideas and practice emerging from the provider communities about ‘as Māori’?</td>
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<tr>
<td><strong>What’s emerging?</strong></td>
<td>What sense can we make of emerging issues, evidence, data about this development?</td>
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<tr>
<td><strong>So what?</strong></td>
<td>Whose values are we applying to our judgments? And what importance do we place on the different values and perspectives that are emerging?</td>
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<tr>
<td><strong>What’s the value / significance / importance of what we’re doing and achieving?</strong></td>
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<td><strong>Now what?</strong></td>
<td>How will we take our new understandings of ‘as Māori’ and apply these to the next phase of development?</td>
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<tr>
<td><strong>What does this mean for how we should now act? Into the future?</strong></td>
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How did we go about answering the evaluation questions?
Cycles of planned engagement, reflection and action

- 18 months pre-evaluation involvement in the programme review and revisioning
  - Policy and evaluation advice
- 18 months into a 3 year evaluation
- Core Methods:
  - National and regional workshops (hui) with programme providers
  - Field visits to programme providers (1 to 2 per provider, per annum)
  - Interviews with programme providers, SPARC and programme personnel
  - Systematic reflective evaluative practice - evaluation team and client
  - Evaluation planning meetings with the client (approximately quarterly)
- Culturally based programme outcome framework
  - Development of data collection instrumentation
Cultural traditions and practices privileged

• Cultural norms, values and principles guide practice
  – Observing cultural protocols
  – Valuing cultural way of doing things

• Systems concepts: boundaries, perspectives and inter relationships
  – Highly congruent with Māori (indigenous) values
Cultural ‘ice breakers’ create connections

• Culturally responsive methodologies
  – Metaphor, story telling, language
  – ‘Numbers’ are powerful too

• Cultural contemporary evaluative synthesis tool
  – Cultural analytic lens

• Cultural critical thinking tools
  – Tapping into Māori ways of thinking and being
What are the findings and lessons learnt to date?
## Emergent understanding of ‘as Māori’

- An ‘as Māori’ continuum with five dimensions emerging:

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<tr>
<th>By... Māori</th>
<th>Refers to the extent of control (rangatiratanga) by Māori in the governance, management and delivery of an initiative</th>
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<tbody>
<tr>
<td>For... Māori</td>
<td>The importance of family and tribal relationships (whānau, hapu, iwi) and other Māori collectives bought together for Māori purposes</td>
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<td>Use.. Māori language and customs</td>
<td>The importance of language and customs as central to the survival and affirmation of what it means to live ‘as Māori’</td>
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<td>On... In... Places of cultural significance</td>
<td>From ancestral domains (e.g., rivers, mountains and gathering places such as meeting houses), to more contemporary places such as Māori language childcare centres and schools (kohanga reo and kura kaupapa)</td>
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<tr>
<td>Through</td>
<td>Activities that are distinguished in uniquely cultural ways e.g., traditional and contemporary sport and recreational activities</td>
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## Systems thinking

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<th>Boundaries</th>
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<td><strong>Internal to SPARC</strong></td>
<td><strong>Enhanced credibility within SPARC through the development of programme monitoring framework</strong></td>
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<td><strong>External to SPARC</strong></td>
<td><strong>In traditional physical recreation application of ‘As Māori’ participation in sport &amp; recreation unique to SPARC</strong></td>
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<th>Perspectives</th>
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<td><strong>Organisational management and programme management</strong></td>
<td><strong>Increased awareness and profile of He Oranga Poutama in SPARC</strong></td>
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<td><strong>Mainstream and tribal providers</strong></td>
<td><strong>Increased understanding of the different challenges for mainstream and tribal organisations</strong></td>
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<th>Inter-relationships</th>
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<td><strong>Mainstream and tribal organisations</strong></td>
<td><strong>Exploration of historical ‘patch protection tensions</strong> <strong>Balancing expectations of mainstream service delivery with ‘new’ as Māori focus</strong></td>
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<td><strong>Within mainstreams organisations</strong></td>
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Applying developmental evaluation in an indigenous context

- Draws on cultural values, needs, strengths and aspirations
- Cultural concepts, language and values are foundational within evaluation thinking, processes, tools, frameworks, data collection, reporting etc
- Supports and encourages culturally appropriate participation in the evaluation by Māori
What is the potential of developmental evaluation in other contexts?
• Traditional evaluation not suited to all contexts
  – Distinctive ‘niche’ for developmental evaluation
  – Check’ fit’ for purpose
    • Ongoing development
    • Adapting effective/proven principles to a new context
    • Rapid response in turbulent, disaster situations
    • Pre-formative development
    • Major systems change and cross-scale development evaluation

• Developmental evaluation not suited to all organisations / funders
  – Willing/able to commit quality time and ongoing engagement to the evaluation
  – Comfortable with ambiguity and willingness to learn, to hear bad news, to adapt
  – Strong relational trust between key stakeholders
Reflecting on the journey to date

• Developmental evaluation is not an easy option – for the funder or the evaluator
  “Thank goodness we chose and are able to use DE, it’s the right way to go, but it’s hard work”  (He Oranga Poutama Programme Manager)

• Relevance and credibility lies in relationships of trust, built up over time
  “Where the end is unpredictable and emergent, values, processes and relationships become anchors” (Kate McKegg, co-evaluator)

• Developmental evaluation is responsive to culture and cultural context
  “[DE] sits alongside, doesn’t control or dampen the core values of innovation” (Wehipeihana, cited in Patton, 2010).
References


Acknowledgements

I would like to acknowledge:
- my co-evaluators Kate McKegg and Kataraina Pipi.
- Veronica Thompson and Melanie Rutherford (SPARC)

for their ongoing support and engagement in this evaluation.

Tena koutou katoa

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