

A stagecraft of New Zealand evaluation

NZ evaluation

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Prologue

Since the 1960s there has been a growing interest in evaluation shown by most Western countries. Alongside discussion of practical and theoretical issues of evaluation, such as methodological developments, best practice, and cross-cultural practice, there has also been increased interest in mapping the history of evaluation activity.

Historical discussions are significant for three reasons; first, in providing a record for future generations of evaluators. Second, they provide a consideration of the domestic and international context that has shaped evaluation development, giving each country its distinct institutional make-up and brand of evaluation activity. Third, they assist a country's evaluation capacity development by building on its strengths and compensating for the weaknesses of its history.

This article traces the emergence of evaluation within New Zealand using the metaphor of dramaturgy to introduce the settings and actors that we consider to have been constituent of what was played out in the New Zealand situation. Our remit is a broad one of attempting to describe and explain the range of evaluation activities, including program evaluation, organisational review, performance management, and process and policy evaluation.

Within this article a broad overview only is possible. As an example of a more in-depth study, a comprehensive article could be prepared on the history of performance management in the public service. Our comments cover developments in the public sector, tertiary sector, and private and professional organisations. It is a companion paper to one on the history of evaluation in Australia, prepared by Colin A Sharp in a recent issue of this journal (Sharpe 2003).

Setting the scene

There are particular historical and contextual considerations—institutions and ideas—that set the scene for New Zealand. These include the country's colonial heritage, the derivative nature of a centralised Westminster system of government, the relatively small population, Maori as *tangata whenua*,¹ a tradition of pragmatism within politics and decision-making, and a dependence on overseas sources (from the United States and Europe) for ideas and methodologies in evaluation and social science generally.

Our account of evaluation is informed by these contingent social, political, economic and intellectual considerations. There are also cross-national backdrops that must be understood related to slower growth and economic recession, the emergence and growing awareness of seemingly intractable social problems, and the rising sway of social science ideas.

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and methodological breakthroughs bolstered the perception that mature and scientific social sciences had arrived. Expansion of social science and some social and policy research in the university sector was assisted by professional courses of social work and public administration. Social science was seen to contribute to policy advice, initially centring upon collecting baseline 'social facts' and research was expected to provide an understanding of the size, nature and perceived causes of problems. During the 1950s embryonic research functions were gradually added to pre-existing information and statistical functions within government departments such as Justice, Labour and Education. However within the university system some remained critical of the lack of government-funded research on social problems, of social legislation introduced without an appropriate basis, and the failure to explore the consequences of existing policies.

The 1970s was a period of economic and social upheaval—with changing family patterns, rising unemployment, demands to honour the Treaty of Waitangi, a growing Pacific Island migrant population, and urban dislocation. This was a period of soul-searching and an era of national committees, conferences, reviews and task forces. The Social Council, one of the many councils resulting from the National Development Conference of 1969, highlighted the importance of evaluating systems and exploring the effectiveness of spending on particular interventions (Social Council 1973; Social Development Council 1975). Non-

governmental interests advocated an independent Social Research Institute to evaluate existing social services, new interventions, and effects of social policy (Shields 1972). There was a real sense that better organisation of capacity and more strategic coordination would go some way to harnessing the utility of social science and evaluation.

This theme was echoed by the Task Force on Economic and Social Planning (1976), which highlighted the dearth of social research and stressed the need for better evaluation of programs. It provided the impetus for establishing the New Zealand Planning Council (NZPC) which had the task of medium-term analysis and forecasting (three to five years). The Planning Council noted that existing policies went unchallenged while new proposals received a thorough appraisal (NZPC 1982, p. 21).

The early cast

Early developments in evaluation suggest that professional evaluation practice has drawn from two distinct sets of players.

On the one hand, there is the long history of (financial) audit, which has developed around financial management and become tied to exploring particular activities against accepted standards. Over recent decades this stream has evolved to include *comprehensive performance audit* and *value for money*, focusing on wider issues of effectiveness. Such audit activity may be either internal or external to an agency, organisation or firm. Secondly, evaluation drew on American agricultural extension services arising from the 'dust bowl storms' of the 1930s and the deep well of social science research that emerged overseas post war, especially in the 1950s. Early evaluation of similar programs was evident within New Zealand agriculture—a 1967 seminar at Lincoln College had 48 delegates, and noted project evaluation had come of age (Jenson 1967). There were summaries of evaluation studies of irrigation, water supply, drainage, farm intensification, and land development schemes (Johnson 1967).

The demands of economy and society encouraged a number of government departments to begin to conduct evaluation-type activities from the late 1960s and through the 1970s (including Ministries of Justice, Internal Affairs, Labour and Health). In education, evaluations of pilot schemes for first-year apprentices were being conducted as early as 1974 (Department of Education 1974). A climate of concern about the costs of social programs and concerns for accountability led to a specialist Evaluation Unit of five staff being set up within the Department of Social Welfare in 1981, separate from the Department's Research Section which already carried out some evaluative studies. By 1983 a handbook was in circulation, and the State Services Commission (SSC) was tentatively encouraging evaluation activity across a range of government agencies (Benton 1983).

Social Impact Assessment (SIA) emerged after 1973 from the requirement that environmental

reports include social components (Ministry of Works 1983). Reaching its high tide in the early 1980s, SIA was frequently used to assist the planning of large industrial projects and to understand the fall-out of rapid changes in previous land use patterns. First used in the development of the Huntly Power station, SIA became associated with the construction, operation and wind-down of 'Think Big'-type projects; for example, the Marsden Point refinery in Northland, petrochemical developments in North Taranaki, forestry projects, and, later, in mitigating the impact of State restructuring (Ministry of Works 1987).

Outside of the social policy arena, agencies including the New Zealand Forest Service, Ministry of Agriculture and Fisheries attempted to evaluate the social effects of their programs in the 1970s (NZPC 1982, p. 22). However, such developments were a far cry from the New Zealand Planning Council's vision of mandatory evaluation of existing policies and programs. A survey of governmental social science capacity highlighted the lack of skills and difficulty of retention. However, staff were engaged in a wide range of work—research and analysis, evaluation and monitoring, advice, information, and statistics (Keir 1982).

From lead to cameo: the changing role of the state

Developments in evaluation after the early 1980s were strongly affected by the shift from 'thinking big' to 'following markets'. With the election of the Fourth Labour Government in 1984, New Zealand shifted away from both *ex ante* research and *ex post* research. This was the period of 'Rogernomics' with deregulation of the banking and financial system, transport, energy and reform of the tax system. The emphasis was on accountability for outputs and efficiency. Apart from the State Services Commission Social Impact Unit (which was abolished at the end of the 1980s) which was investigating and suggesting ways of minimising the negative effects of restructuring, the 1980s and early 1990s saw little emphasis placed on social research activity. Major changes were introduced without, and sometimes in the face of, contradictory research evidence. A view of decision-making that ascribed a significant role to research and the evidence it produced, gave way to the dominance of theory—market forces, public choice and agency theory. The focus was on *a priori* economic models as a basis for action, and less on investigating the interplay of theory, action and evidence.

Within New Zealand research capacity was eroded, and social science and evaluation was seen to be making a limited contribution to the re-modelling of society. Social science within government and non-government sectors was reduced, with a cut in public service capacity and the demise of the Department of Scientific and Industrial Research (DSIR) Social Science Section and the New Zealand

Institute for Social Research and Development (one of the newly created Crown Research Institutes). The emphasis shifted to improving management and reducing financial risk, from inputs to outputs and to greater clarity of accountability. In New Zealand, the period saw little encouragement—and often active discouragement—for evaluation. It has been suggested to us that the purchasing paradigm focused ministers on 'buying' more services and policy development rather than evaluation which tended not to be treated as an integral part of policy and was regarded as taking too much time. Further, decisions were often made before evaluation findings were available to inform such decisions.

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Evaluation activity as conducted centrally by the State Services Commission (SSC) at this time was a distinct type of review activity mandated by the new legislation, aiming to provide an overview of the attainment of objectives and performance of particular government departments. The twin legislative pillars of the *State Sector Act 1988* and *Public Finance Act 1989* and the restructuring and decentralisation of Departments and state-owned enterprises (SOEs), set the context for a number of developments within the commission related to evaluation. They contributed to increasing emphasis being placed on both internal and external accountability. The role of the SSC Reviews Division was to meet the State Sector Act's requirement of reviewing departmental and chief executive performance (see Trotman, 2003, for further details of SSC review processes).

During these years (late 1980s to early 1990s), Treasury were suspicious of the term of 'evaluation' on two counts. First, the term 'program evaluation' in the New Zealand context was likely to cause opposition and confusion, because of the association of the term 'program' with the large activities under which budgets were organised. Secondly, the thrust at this time was about emphasising outputs for accountability and splitting purchasing and providing, rather than outcomes. Central agencies, intended to focus on how ministers might be helped with their responsibilities for outcomes as a second phase. To some extent focus on broad outcomes started to be picked up in the introduction of government *Strategic Priority Areas* and departmental *Key Result Areas* in the mid-1990s. SSC reviews enhanced the new model of government management that separated its *purchaser* and *ownership* interests. Their triple focus was on accountability, risk management and performance improvement.

The national government changed tack again in 1990 and encouraged a move away from reviewing the work of individual departments to *pan-departmental* areas of potential widespread

ownership risk, such as office accommodation and information technology. After about three years the separate Reviews Division was absorbed into a more integrated approach in a restructuring of SSC. A 1992 report led to the Minister deciding to add self-review to chief executive performance agreements (SSC 1992). A separate volume of *Guidelines* was produced to help improve the management of risks and the quality of self-reviews (see also Trotman 1993).

Attempts to link outputs and outcomes progressed with limited success. It was only in the late 1990s that with the encouragement from Simon Upton (the Minister of State Services) to focus more on the achievement of Government Strategic Priority Areas, that the SSC explicitly promoted the place of evaluation of activities, and sought to stimulate its use throughout levels of government.

The dramatis personae

Key actors within the field of evaluation in New Zealand have been drawn from across the public, tertiary, private and non-statutory sectors. The relatively small size of the New Zealand evaluation community has resulted in these groups overlapping more than in larger countries such as Australia or the United States.

Public sector

A number of departments increased review responsibilities arising from the mid-1980s restructurings. In addition to the State Services Commission's activities, the Education Review Office, and the Ministry of Research, Science and Technology had major 'evaluation' activities in their portfolios. The Department of Social Welfare had been conducting evaluations with a social science research thrust since the early 1980s and had a strong unit. A small unit operated in the mid-1980s in the Community Affairs Division of the Department of Internal Affairs; and a single specialist evaluator was employed in the National Library. In the late 1980s the Departments of Inland Revenue, Justice, and Tourism set up evaluation units with management links to their strong internal audit units. There was growing evaluation interest in the Ministry of Works around the time it was restructured out of existence. A little later in the mid-1990s the Department of Labour set up an evaluation component in its Policy Division, initially under overseas recruited management, which provided a core of expertise, and which encouraged evaluation in other divisions of their activities. Te Puni Kokiri when set up in the mid-1990s included a strong evaluation capability and the Ministry developed guidelines for evaluation with Maori. When the Department of Work and Income was established in the late 1990s a strong evaluation focus and unit was incorporated into the design. However, a number of other departments lacked capacity. In some cases departments regarded evaluation as a part of policy capability so did not believe they required a separate or specialist unit.

Tertiary interests

The tertiary sector occupies two potential roles vis-à-vis evaluation: first they are potential contract providers of evaluation, either on their own or as part of broader research teams. Second, they have a potential role in teaching about research and evaluation practice.

The National Research Advisory Council (NRAC) *Report of the Working Party on the Training of Social Science Researchers* (Robertson 1984) highlighted the need to strengthen interdisciplinary research cooperation at the practical level, through courses which would develop and upgrade social science skills with a policy-making orientation. The recommendation came from both government and private employers.

The Diploma in Social Science Research was introduced at Victoria University at Wellington in 1987, through support of external funding (for five years from five government departments) for those people already in employment who were required to use research knowledge and skills. It became a Master's program in 1992. In 1980 a graduate program in community psychology at the University of Waikato commenced on evaluation research in response to the growing number of requests made to them for assistance with evaluations (Thomas 1983). A number of institutions have since added evaluation components to their undergraduate and postgraduate qualifications (for example Massey University in the BA and B. Social Work, and Victoria University in its Master of Public Policy program). Beyond a specialist program in educational evaluation run by Massey, there is no specialist evaluation qualification offered within New Zealand, although a postgraduate diploma is now under development at Massey (Wellington). There have been useful handbooks (Casswell & Duignan 1989), and more recently a text (Lunt, Davidson & McKegg 2003) which aimed to fill a gap in terms of training and education.

In terms of evaluation providers, there are individuals at all the main tertiary institutions who undertake evaluation activities. The demands of the funding régime within tertiary education are increasingly providing incentives for departments and universities to raise income streams from applied research and evaluation activities. There are few research centres outside of health with a primary function of full-time research, apart from those that have arisen recently for Maori and Pacific Island research. These include The International Research Institute for Maori and Indigenous Education (IRI) situated in the Faculty of Education aims, Nga Pae o te Maramatanga (The National Institute of Research Excellence for Maori Development and Advancement), and The James Henare Māori Research Centre, all based at the University of Auckland. The Pacific Health Research Centre (Whitireia) undertakes health research that contributes to the health and wellbeing of Pacific Peoples and supports and provides opportunities for Pacific researchers and access to Pacific health research. At Massey University, there are research

programs focused on Maori health (Te Pūmanawa Hauora), Maori households (Te Hoe Nuku Roa) and Maori language (Toi te Kupu), as well as developments in research of Maori public health.

A number of dedicated research groups working on particular social issues have undertaken large amounts of evaluation working on contract to government agencies supported by national research funders. For instance, the Alcohol Research Unit at the University of Auckland funded by the Alcohol Advisory Council (ALAC) and the Health Research Council worked on evaluation during the 1980s and 1990s. It was renamed the Alcohol and Public Health Research Unit and worked with a companion Maori research unit, Whariki.

More recently the same group working as the Centre for Social and Health Outcomes Research and Evaluation and Whariki at Massey University, Auckland, have continued their long-term involvement in evaluation in New Zealand. For instance, in the mid-1980s Professor Sally Casswell undertook one of the largest social program evaluations in New Zealand investigating the combined impact of community action workers and advertising on alcohol problem prevention, and has continued evaluating such programs (Duignan & Casswell 1992).

Her research has widened its scope from alcohol, to other drugs, and a variety of public health and community development issues working in conjunction with the Maori research group Whariki to provide research and evaluation from a kaupapa Maori base. The researchers have also been involved over the last decade in a systematic attempt to develop evaluation capacity in the community and public health sector (through training programs at various levels and the preparation of resources of various types) (Duignan 2002).

Private sector

The New Zealand evaluation community has a large number of dedicated social research/evaluation consultancies, most of which are small, often single persons, but may be brought together for some larger jobs. These companies are often founded on a core of significant public sector experience, or provide specialist niche-based services, for instance expertise in relation to Maori research and evaluation, or specialising in research with children, criminal justice, or the field of disability.

Community sector

The community sector has also had an interest in undertaking evaluation and since the 1970s has been part of a push to make more widely known evaluative techniques and approaches. For example, the Department of Internal Affairs contributed to development of self-evaluation in New Zealand. Its community development field advisory staff received many requests from community groups

about evaluating projects which led its Research Unit to write a comprehensive guide to planning, monitoring and evaluating community projects (Coup, de Joux & Higgs 1990). The expansion of the contracting environment for service provision has led to continued community interest (sometimes required as part of the contract) to undertake some forms of monitoring and evaluation of funded activities. For example, a Crime Prevention initiative was funded under the aegis of the Department of the Prime Minister and Cabinet during the 1990s.

Professional organisations

During the late 1980s and early 1990s particular individuals, many within the Australasian Evaluation Society (AES) and Wellington Evaluation Group (WEG), nurtured evaluation interests and expertise in what were fairly inhospitable conditions of neo-liberalism's economic and social policy. Both the AES and WEG are key to understanding the emergence of evaluation within New Zealand. At the 1986 National Evaluation Conference in Australia, Martin Putterill was a New Zealand representative who ensured that the Australasian Evaluation Society was established—and the name became important for encouraging cooperation of

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evaluation interests on both sides of the Tasman. There has been a growing level of New Zealand participation since the founding of the AES. At the 1987 AES International Conference, Harris presented an analysis of the creation of SOEs and the implications for program evaluation (Harris 1987). New Zealand participation has strengthened ever since until the holding of annual conferences in Wellington (1996) and Auckland (2003) and the election of the first New Zealand AES President, Penny Hawkins, in 2001.

The need for local support stimulated local discussion and the individuals with review/evaluation interests within New Zealand central government met to form WEG to work out common interests, working definitions, exchange of ideas and mutual support. Later through the sterling efforts of Maggie Jakob-Hoff, an Auckland Evaluation Group was founded with a much stronger private sector and academic focus. Jacob-Hoff was later instrumental in founding a Christchurch Evaluation Group, which was short-lived due to a combination of further restructuring of key departments' regional offices and the moving away of key movers and shakers. Over recent years she has also enthused locals to form a Waikato (Hamilton) Evaluation Group. The local Evaluation Groups are almost regional chapters of the AES but have found it useful to retain their local identity.

The broad mission of these evaluation organisations was, and now involves, brokering a range of evaluation interests (including users, doers and supporters). New Zealand evaluation interests were involved in discussions around information exchange and in seeking to raise the level and quality of evaluation activity (whether the evaluand was agency, activity or program). This included mounting training workshops and major academic block courses, organised in Wellington with the University of Melbourne. New Zealand members have also contributed significantly to the AES in:

- developing the AES Constitution
- working towards a Code of Ethics and Guidelines
- discussion concerning training and competencies
- emerging discussions in relation to the accreditation of evaluation providers
- international cooperation among regional and national professional evaluation societies.

The State Services Commissioner of the time (Don Hunn) was a notable supporter of applying evaluation more widely across government and of encouraging the local professional groups. Also, the Chief Executive of the Education Review Office, Judith Aitken, became Vice President of the AES and did much to encourage its local

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acceptance, including hosting the annual meeting and conference in Wellington in 1996 and, during the mid-1990s, strongly advocating wider use of evaluation across government.

Evaluation moves centre-stage in the late 1990s

Since the mid-1990s there have been attempts to make better connections between research and policy, particularly focusing on the output–outcomes relationship. Matheson et al. (1997) within the State Services Commission suggested evaluation was a key to improving government performance to:

... help ‘close the loop’ on government performance, aid judgements about benefits gained for money spent and strengthen our strategic capacity. (p. 93)

Program evaluation has been a constituent component of this and has become situated within the broader desire for ‘evidence-based policy’. A number of factors are currently exerting pressure for evidence-based, or at least evidence-influenced,

policy activity. A key driver here is the continuing emphasis within the public sector to secure value for money, close gaps (between the advantaged and disadvantaged), ensure accountability, and improve service delivery. The government has warmed to the role of evaluation, and ministers have supported the shift from evaluating agency activities in the round to evaluating more discrete policies and (pilot) programs.

A prominent voice within these evaluation debates has been the SSC and its project aimed at *Improving the Quality of Policy Advice* (SSC 1999a, 1999b, 1999c, 1999d). The SSC argued that limited outcome evaluation created a gap in the quality of policy advice being tendered to ministers, and sought to bridge systemic inhibitors to *ex ante* and *ex post* evaluation.

Disincentives to evaluation included low ministerial demand, with ministers keen to identify winners and losers but less so in monitoring long-term impacts (Baehler 2003). The changeability of policy settings and methodological uncertainty contributed to the unwillingness to fund work of a more longitudinal nature. A changing tone of criticism has been in relation to the focus of evaluation, with most studies concentrating on outputs, implementation and management, rather than longer term outcomes (SSC 1999ab), something particularly blighted by the absence of cross-sector working which results in silo approaches to departmental activity. The *Report of the Advisory Group on the Review of the Centre* (SSC 2001) concurs with the view that more emphasis should be placed on outcome specification and the need for studies that determine whether these outcomes have been attained.

The Office of the Auditor-General has also undertaken work to increase parliamentary demand for *impact (outcomes) evaluation*. It highlighted that despite the extent of measurement, monitoring, review and analysis, there was an absence of impact evaluation. Yet ‘impact evaluation rather than implementation studies will help highlight whether results have been achieved, are likely to be achieved, and the design implications’ (OAG 2000, p.136). Evaluations are often directed at pilot programs and ‘small and discrete policy initiatives at the margin of Government expenditure’ (p. 112), whereas policies with significant cost, strategic, or cross-sector implications should have evaluation priority.

Within the Public Service the *Improving the Knowledge Base for Social Policy* initiative has sought to improve the production and utilisation of policy-relevant research. This included establishing the Social Policy Evaluation and Research Committee (SPEaR) in late 2001 to oversee purchase of social policy research across sectors, to improve coordination, and facilitate best practice in combining research and evaluation into more effective policy development.

A review to advise Ministers of State Services and Finance (SSC 2001) about improving state sector management includes a specific section on the need to improve evaluation capability. An Advisory

Group advocated more effective evaluation and a broader focus to evaluation effort with specific suggestions about developing criteria for deciding which outcomes should be evaluated, better liaising with ministers to ensure their sponsorship for impact evaluation, and deciding on evaluation methodology.

A recent State Services Commission and Treasury report continues to explore how the stock of evaluation and evaluation activity can be raised and integrated further into departmental management and policy-making systems (SSC/Treasury 2003). The report identifies three main barriers to evaluative activity within the public sector: a lack of evaluation 'culture', inadequate capability, and poor cross-sectoral coordination. It noted particular problems concerning the current capacity and evaluation approaches for Maori.

Recommendations in this report included: increasing departmental incentives to use evaluation through the budget process and chief executive performance review process; raising the capability within central agencies, and attending to cross-boundary evaluative gaps. A key message is that evaluative development has to be strategic and is not required for all policy changes or for policy spheres where the existing knowledge base is sound. Whilst recognising good evaluation practice across a number of departments and existing cross-sector initiatives, it sees the challenge to make these more widespread through the public sector. The report fully acknowledges that evaluation culture would take time to permeate, and that the wider context of evaluative activity and policy-making was that of *realpolitik*.

Epilogue

Writing the play of evaluation in New Zealand must draw on key stages in the development or evolution of government activities in the country. In the post war 1940s and 50s and early 60s, burgeoning government intervention in many more facets of society encouraged greater use of social science techniques. Through the later 1960s and 70s, the introduction of national and regional planning included assessment of social and environmental impacts. Developments were dampened in the 1980s and earlier 90s with the deregulation and restructuring of many state activities and the emphasis on accountability for, and efficiency in, delivery of outputs. During the last five years the emphasis has refocused on the monitoring of societal outcomes and more evidence-based policy.

The growing emphasis on outcome evaluation and 'evidence' has been both influenced and challenged by broader social and political shifts, including values of consumerism, service devolution, and the assertion of Treaty of Waitangi rights. The push to make services accountable to communities has contributed to a number of tensions emerging from voices in the evaluation debate. These include questions raised by Maori, Pacific Peoples, and people with disabilities, about appropriate

evaluation models and approaches, the issue of representation, *whose* outcomes, and the utilisation of findings to secure change. Whilst some view evaluation as particularly important in reducing the social disadvantages of Maori and Pacific Peoples (cf. Maharey 2000; Cunningham 2003), others are more sanguine about its possible contribution. A key challenge has been from Maori communities about what constitutes appropriate research and evaluation processes for Maori (Moewaka Barnes 2003), and even the mandate of Te Puni Kokiri (TPK) within the sphere of Maori interests.

The recent picture is the development of evaluation capacity in specialist units across a number of departments. Some employ evaluators in policy or research units, for example Health, Environment, Corrections, and the National Library. Some Crown entities (bodies legally separate from the Crown and operating at arms length from the responsible or shareholding minister) are also considering the use of evaluation. Local government and non-statutory agencies are also emphasising evaluation activities in their own service delivery activities. Moreover, the push to evidence-based practice requires a range of professionals (social workers, teachers, health professionals) to consider how they undertake, interpret and contribute to evaluation in relation to programs and practice.

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Note

- 1 First people of the land.

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