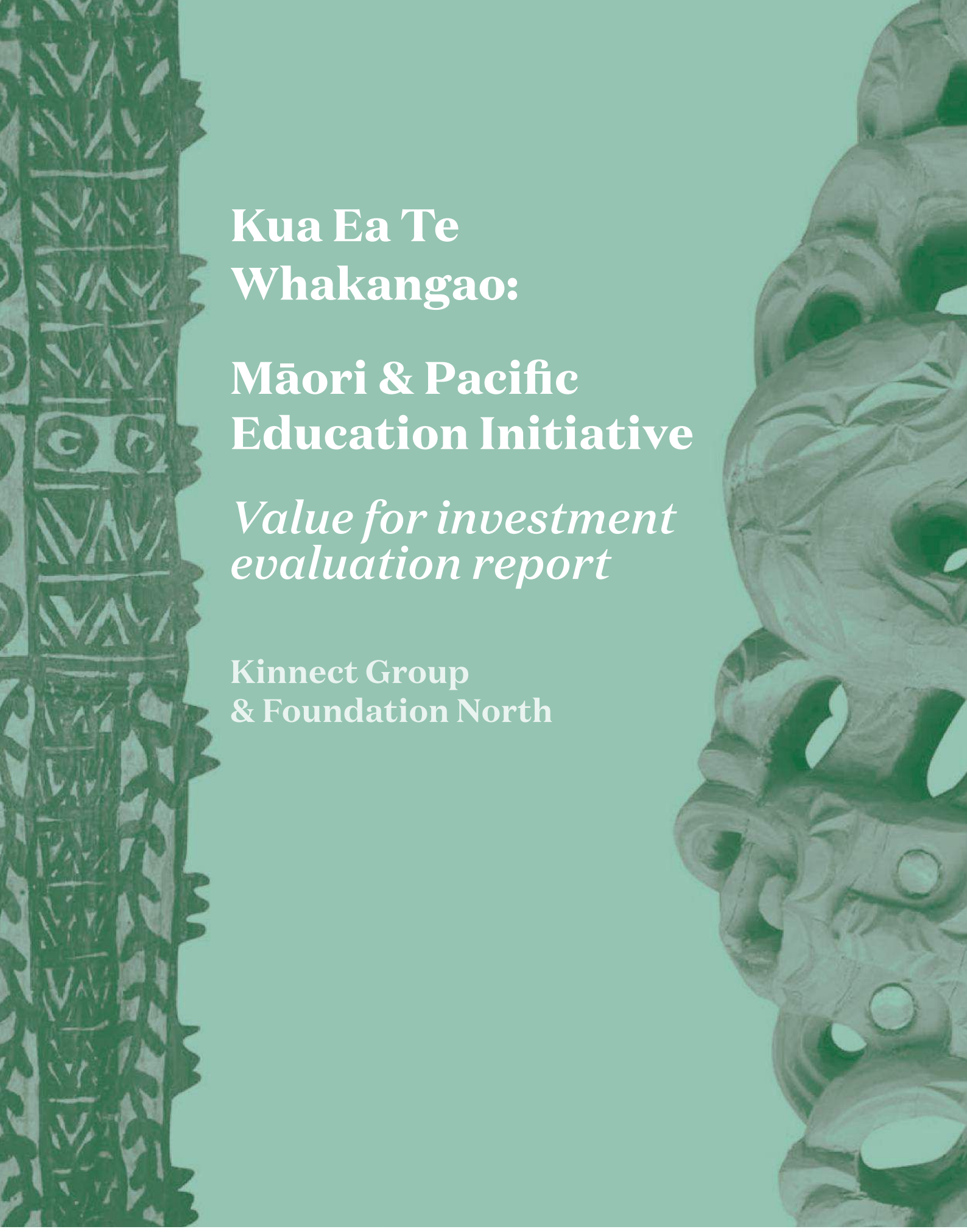

Kua Ea Te Whakangao:

Māori & Pacific Education Initiative

Value for investment evaluation report

Kinnect Group
& Foundation North

FOUNDATION NORTH
Te Kaitiaki Pūtea ō Tāmaki ō Tai Tokerau

Kua Ea Te Whakangao:

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Acknowledgements

The evaluation team would like to express their gratitude to many people who have shared their knowledge and supported this evaluation.

To all the projects in the Māori Pacific Education Initiative. Thank you for allowing us to come into your lives, for supporting the evaluation and for your willingness to share what you have learnt on this journey.

To Foundation North (formerly ASB Community Trust), the evaluators acknowledge the work and admire the passion to ensure that more Māori and Pacific young people have the opportunity to access education. In particular to Jennifer Gill, Moi Becroft, Chloe Harwood, Alison Taylor, Cyril Howard, Peter Stowers, and Annie Johnson, thank you for your insight, guidance and support in this evaluation.

Thanks to Kevin Prime, Foundation North kaumātua, for report naming, mihi and whakatauki.

Ngā mihi nui ki a koutou.

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Mihi

Ki nga iwi o Tamaki o Te Tai Tokerau
Nga mihi mahana ki a koutou katoa
Ka mihi ki a koutou hononga ki te whenua
Tena koutou, tena koutou, tena koutou katoa

To the iwi and Māori of Tamaki and Te Tai Tokerau
We extend our warmest greetings
In respect of your relationship to the land and its history
Greetings to you all

Ki nga iwi o Te Moana nui a Kiwa e noho ana e mahi ana
I nga rohe o Tamaki o Te Tai Tokerau
Talofa lava – Malo e lelei – Kia orana
Nisa bula vinaka – Fakaalofa lahi atu
Namaste – Taloha ni – Fakatalofa atu

To Pacific peoples also living and working
In the Auckland and Northland region
Talofa lava – Malo e lelei – Kia orana
Nisa bula vinaka – Fakaalofa lahi atu
Namaste – Taloha ni – Fakatalofa atu

Ka mihi ano hoki ki
Nga momo iwi katoa
E whai herenga ki tenei rohe
Nga mihi tino mahana ki a koutou katoa

We also acknowledge
The many other peoples and ethnic communities
Who have strong ties to and interests in this region
Our warmest greetings to you all

Ki a koutou katoa e noho ana i Aotearoa
E noho tawhiti ana i tawahi
Nau mai whakauru mai ki te panui i enei kupu
Tena pea he painga reka ka kitea e koutou i konei

To all of you who are living in New Zealand or abroad
Welcome, come in and be part of us
Read the stories that follow
May you relish what you find here

Whakatauki

He ira
He puawaitanga
He ponanatanga
He mātauranga
He maramatanga

A dot
A blossoming
Uncertainty
Knowledge
Enlightenment

CEO's Welcome

Jennifer Gill

Foundation North is responsible for the careful management of philanthropic funds. So, starting up a high-cost, innovative scheme like the Māori and Pacific Education Initiative was risky.

I'm delighted to say that we have no doubts that the risk paid off.

Foundation North had never made such a big investment based on such a visionary approach over such a time frame: $20 million to an unknown number of organisations, yet to be found, for at least five years.

It took longer than we imagined to find good processes to select and support the projects; there were more unexpected challenges and changes than we could ever have predicted; and the outcomes so far are better than we could have hoped.

Outcome evaluation

There are many ways to measure the outcomes of philanthropy. How do we show that the grants we make are good value for investment? How are we accountable for financial results but also for other measures important to the Auckland and Northland communities we serve?

From the start, we asked questions about how to evaluate the Māori and Pacific Education Initiative. Kinnect Group, an experienced team of evaluation professionals, joined that conversation early, and together we embarked on a developmental evaluation. Criteria for success were developed with the MPEI projects and Foundation North Trustees, and steps towards outcomes gathered and fed back into the further development of each project.

This report presents findings on the evaluation outcomes that were tracked. One of the highlights for me is in the educational data – learners in the MPEI projects did better than their peers, and even surpassed national rates and norms. Given that those national norms have primarily marked too many Māori and Pacific learners as "failing", this is a wonderful outcome.

Furthermore, the evaluation found that the vast majority of projects achieved outcomes that families and communities valued. Young people grew in cultural confidence and identity; students were more engaged and showed up for class; and their families and whānau were valued and supported as crucial partners in educational success.

We are also thrilled at the spread and scaling up of a number of the projects, including those that have found sustainable long-term funding, or with innovative approaches that are gaining attention widely in New Zealand and overseas.

Elements of success

The "high-trust, high-engagement" funding approach, where funders work closely with communities to fund large-scale visions, was challenging, but in this case, undoubtedly successful. Three key elements of success across the projects were identified:

Being community-driven with project sovereignty.
We had to trust our communities to determine their own solutions, providing support for them to build capacity and skills where needed.

Having a way of working that reinforced young people's cultural legitimacy and identity.
Culture was integral to the vision, leadership and structure of the projects, to the educational outcomes, and to all involved, including here at Foundation North.

Using a relational approach that built whānau resilience, safety, knowledge and skills.
Careful relationship-building, not just a focus on individual learners, increased whānau and family engagement in education.

A relational approach also worked across MPEI in the nurturing of relationships between projects, advisors, wider communities and Foundation North. At the heart of those relationships was Moi Becroft, the MPEI Manager for Foundation North. There from the start, and deeply committed to the stewardship of the initiative, along with Annie Johnson, our MPEI Administrator, their steady input was hugely valued by all involved.

Report series

This is the third in a series of reports. In the first report,[1] we shared some key lessons learned about starting up such an innovative philanthropic project. The second report[2] gave a taste of how innovative grant-making works in practice, from interviews with MPEI reference groups, funding applicants, external advisors and Foundation North staff and Trustees.

This third report presents the formal evaluation findings at the conclusion of the MPEI programme, across the range of outcome criteria developed. We are aware that the learning and growth continue, and have therefore also developed a Learning Series, which features MPEI in terms of learning about Māori and Pacific educational success, high-engagement funding and how to evaluate high-engagement funding.

Jennifer Gill

Chief Executive Officer
Foundation North

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

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

Executive Summary

Foundation North (formerly ASB Community Trust) established the Māori and Pacific Education Initiative (MPEI) in 2006. The vision, "Mā tātou anō tātou e kōrero, We speak for ourselves", set the intent of this initiative to find innovative community-based projects that could address the seemingly intractable problem of Māori and Pacific young peoples' underachievement in education.

The Foundation undertook a consultation process with Māori and Pacific communities and education leaders to identify community-led projects that held promise of creating meaningful social change. After a lengthy consultation and selection process, seven projects were chosen as part of phase one of the initiative. In 2011, more projects were added as part of phase two (see Appendix A for project summaries).

Guided by principles of collaboration, co-design and community development, the MPEI project leaders and staff were to become partners in a "high-trust, high-engagement" journey with the Foundation, working together towards realising the vision. This type of philanthropy was new to the Foundation. It combined funding and capacity building support; it was a more engaged form of funding, that is, not just a grant, but rather an approach that was all about the development of trusted relationships of support and co-creation.

An evaluation was funded to support the projects during their development and to evaluate the overall initiative.

The evaluation set out to answer the following key evaluation questions:

Evaluation of high-engagement investment

- To what extent was the MPEI project worth the money?
- What are we learning about high-engagement investment?

Evaluation of MPEI overall

- To what extent do we have evidence of programmes that significantly outperform others?
- To what extent does this work enable the Foundation to engage in policy dialogue with government?

Evaluation of each individual project

- To what extent are there models that work?
- How well do they work?
- What is the evidence of their success?
- How well are we able to capture data that demonstrates this?
- To what extent are they outperforming other projects?

To answer the "To what extent?" and "How well?" questions, a performance framework (an evaluative rubric) was developed in consultation with the Foundation North Trustees. This clarified the criteria for success and different levels of performance, in terms of overall effectiveness and value in relation to the MPEI investment.

Findings in summary

The evaluation finds that the Māori and Pacific Education Initiative has been highly effective—**a valuable investment overall.** A positive economic return on the investment made by Foundation North is also highly likely; that is, the future economic value of improved educational outcomes is likely to significantly exceed the value of resources invested by the Foundation in the initiative.

Against the majority of evaluation criteria, the MPEI project has been found to be **highly effective.** Where comparable **educational data** are available, it is clear that these projects have been at least as successful or outperformed other, similar projects. For example, to date 85% of the Leadership Academy cadets have achieved NCEA Level 2 in Year 12.

This result compares well against national averages for Māori and is better than results presented in three of the four identified case studies and exemplars highlighted in the Ministry of Education's Rangiātea series. The results for C-Me and Mutukaroa also compare strongly against national rates and norms.

For the majority of projects, there is evidence of **improved student attitudes** to learning and life, increased whānau engagement in education, and improvements in engagement and retention. There is also evidence that some projects have resulted in whānau having higher aspirations for themselves and their children, and improvements in family functioning and relationships.

Culture is an integral and overt part of what most of the projects are about, and evidence confirms that the projects enhanced and contributed to young people's **cultural confidence and identity**.

There is also a range of evidence which, in combination, demonstrates that the vast majority of projects are achieving **outcomes that their families and communities value**. The **spread and scaling up** of a number of the projects is also a strong indicator of the projects' outcomes being valued.

The majority of projects operate with models that are working effectively. The projects have a **clear rationale with good evidence** for how their projects are intended to work. These rationales or theories of change are supported by research and established success frameworks.

Key elements for success that have emerged across the different projects are:

- being community-driven with project sovereignty
- having a way of working that reinforces young people's cultural legitimacy and identity
- using a relational approach that builds whānau resilience, safety, knowledge and skills.

It is notable that a number of the projects have been **adapted and expanded into other communities.** Other organisations and government have extended funding to some of the models pioneered through the initiative. The projects have attracted significant interest from government, including senior ministers and government officials, that in some cases has resulted in **sustainable, long-term funding**.

It is not clear whether the initiative has enabled the Foundation to engage in significant policy dialogue; however, models pioneered through the initiative have had an **impact on wider funding decisions.** This has occurred particularly when a project matched existing policy settings.

In addition, a number of the projects provide **solid examples of what success for Māori and Pacific learners looks like** through a culturally grounded and strengths-based lens. These delivery models provide strong examples that reinforce existing policy settings and also research evidence for achieving success for Māori and Pacific learners.

The **high-engagement funding approach** adopted by Foundation North has gained interest from other philanthropic organisations and funders. The Foundation's development of the new Centre for Social Impact positions the Foundation well to further influence philanthropy and government.

There has been a concerted effort to coordinate the communications about the initiative's learning and achievements. These **strategic communications** will increase the spread of learning from the initiative's work and therefore its impact and effectiveness, and there is a potential role for Trustees in this.

It was acknowledged from the outset that high-engagement funding was innovative for the Foundation and, given the emergent nature of the outcomes, there was risk attached. Working in such an innovative way required a tolerance of uncertainty.

It was acknowledged from the outset that **high-engagement funding was innovative** for the Foundation and, given the emergent nature of the outcomes, there was risk attached. Working in such an innovative way required a tolerance of uncertainty.

A shared understanding of the initiative's vision guided decision-making at difficult times. **Ongoing cycles of reflection**, building strong relationships, listening to the voices of stakeholders and being prepared to change direction when necessary are important features of this project.

Learning was identified and acted upon, and this resulted in ongoing refinement of the funding approach.

The **return on investment** was investigated for individual projects. This focused on the tangible, monetary value of resources invested and educational outcomes. On this limited basis, a positive return on investment seems highly plausible considering the impacts of the projects to date. For example, for C-Me Trades At School, the researchers compared the starting salaries of graduates to the Pacific median annual wage and found that their trades education gave them a $270,000 advantage, without taking any subsequent pay rises into account. If Trades At School produces 105 graduates in its first five years (which it is on track to do), the net public and private attributable benefit to the graduates and society is estimated at $29 million. That represents a positive return on investment in the whole initiative, achieved from this one project alone.

1 Introduction

This report summarises findings from the evaluation of the Māori and Pacific Education Initiative (MPEI).

One of the evaluation objectives was to identify how and to what extent the grant making through the initiative achieved value for money for the funder, Foundation North. This included assessing economic and other dimensions of value delivered by the individual projects as well as by MPEI overall.

Background

In 2006, Foundation North (known then as the ASB Community Trust) set aside $20 million for a Māori and Pacific Education Initiative, the largest amount it had ever committed to any single venture. The aim was to find and fund innovative proposals that addressed the serious problem of chronic educational underachievement among Māori and Pacific[3] young people. The Foundation wanted to use a grant-making process that would attract new and visionary proposals.

The Kinnect Group was engaged to provide a multi-year evaluation of the initiative that focused on the value of the overall investment, the effectiveness of each of the projects and learning about high-engagement investing with Māori and Pacific communities. The key evaluation questions are summarised in **Figure 1.**

Figure 1: *Key evaluation questions for MPEI*

Evaluation of high-engagement investment

To what extent was the MPEI project worth the money?

What are we learning about high-engagement investment?

Evaluation of MPEI overall

To what extent do we have evidence of programmes that significantly outperform others?

What are we learning about high-engagement investment?

Evaluation of each individual project

To what extent are there models that work?

How well do they work?

What is the evidence of their success?

How well are we able to capture data that demonstrates this?

To what extent are they outperforming other projects?

3 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)

II Methodology

This evaluation used a mix of qualitative, quantitative and economic methods to determine the extent to which the initiative achieved value for the funds invested by the Foundation.

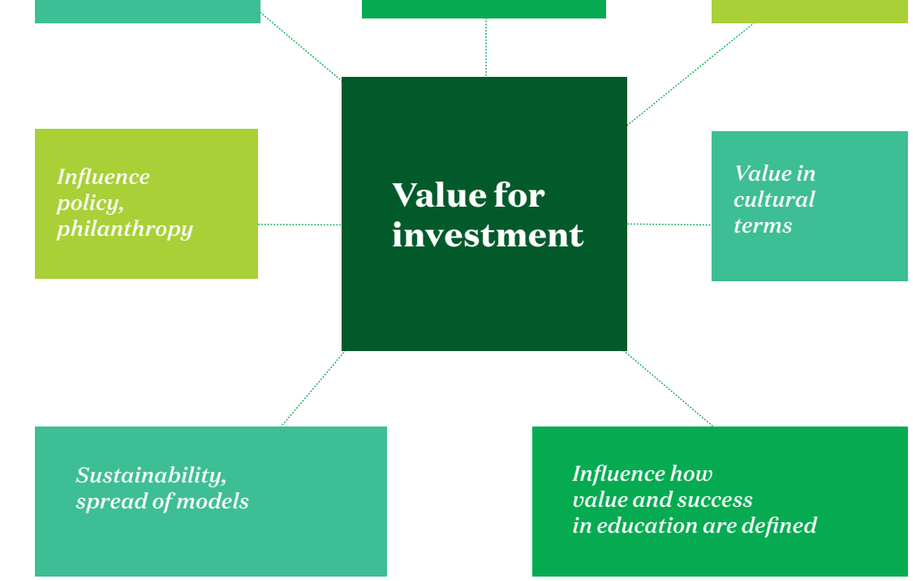
Full details of the evaluation methodology are provided in Appendix B.

Evaluation-specific approach

An evaluation-specific approach[4] was used in order to produce findings that are valid (supported by robust evidence and analysis), credible (for example, underpinned by appropriate methods) and useful (of practical value to inform future decisions).

Clear criteria were developed to provide an explicit basis for determining whether the initiative was worth the resources used. These criteria were developed in consultation with Foundation staff and Trustees. They are summarised in the following diagram, **Figure 2**, and detailed within a performance framework or evaluative rubric, **see Appendix B**.

Figure 2: *Multiple criteria used to assess value for investment*



4 Scriven, 2012 (see References section for full source details)

Multiple sources of evidence

Evaluation criteria include tangible dimensions (such as educational achievement and economic return on investment), as well as intangible dimensions of value (including value to families and communities, and value in cultural terms).

Accordingly, a mix of data collection methods, drawing on multiple sources of evidence, was used to address the criteria. These included:

- analysis of data on educational outcomes
- interviews with Māori and Pacific students and their families
- interviews with project leaders and staff
- interviews with other relevant stakeholders in the community
- review of literature on the economic value of educational outcomes
- review of economic and demographic data on relevant features of the New Zealand economy and society
- hui and fono with MPEI providers
- evaluation capacity building to help providers tell their own performance story
- photovoice to capture the perspective of youth on what their involvement has meant to them and their families
- review of research findings (for the Mutukaroa and Manaiakalani projects).

Table 1 sets out the data collection undertaken for each MPEI project.

Table 1: *Forms of data collection—MPEI projects*

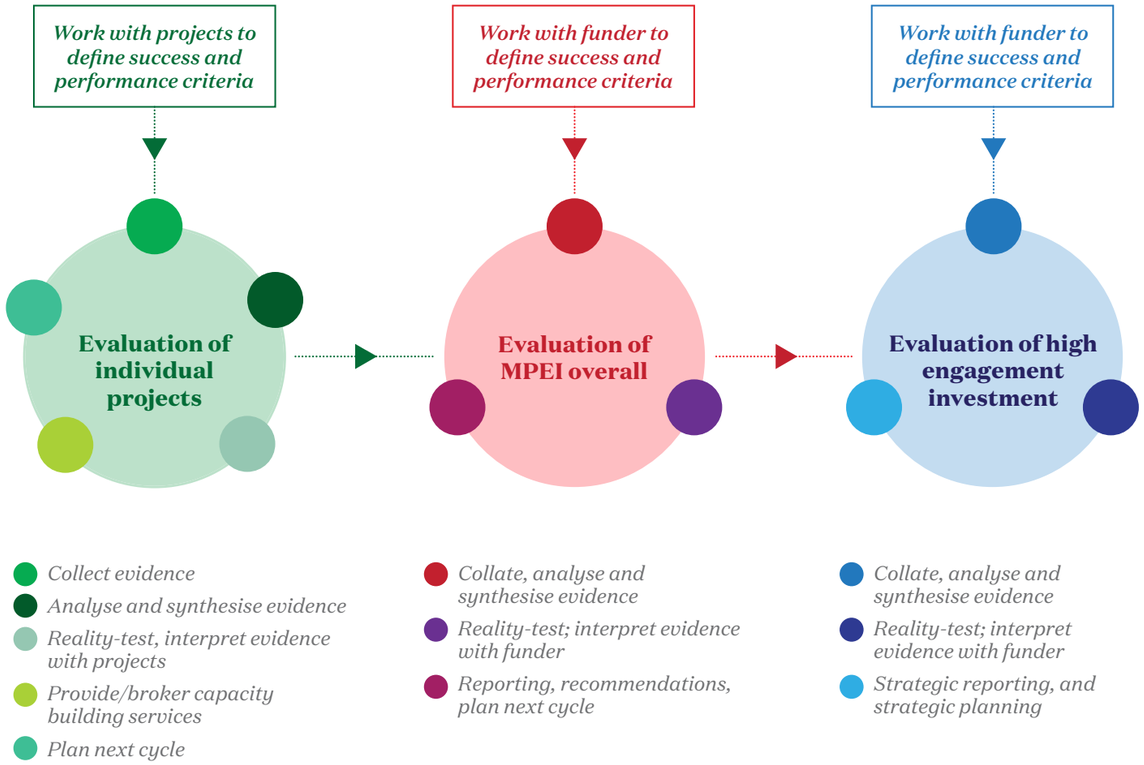
MPEI Projects	*Economic analysis*	*Analysis of educational data*	*Focus groups/ interviews*	*Review of administrative data*	*Quarterly visits*	*Photovoice/ testimonies from young people*	*Digital impact stories*
C-Me	√	√	√	√	√	√	√
Sylvia Park	√	√		√	√	√	√
Rise UP	√	√	√	√	√	√	√
Ideal Success	√	√	√	√	√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

Synthesis of evidence

Sense-making of the initiative overall and of the high-engagement funding approach occurred at a project level and in cycles. For each iteration, the evaluation team sought to answer the key evaluation questions and reported conclusions and recommendations to the Foundation and back to projects. The evaluation criteria, performance framework and the key evaluation questions provided a framework for continuing interpretation.

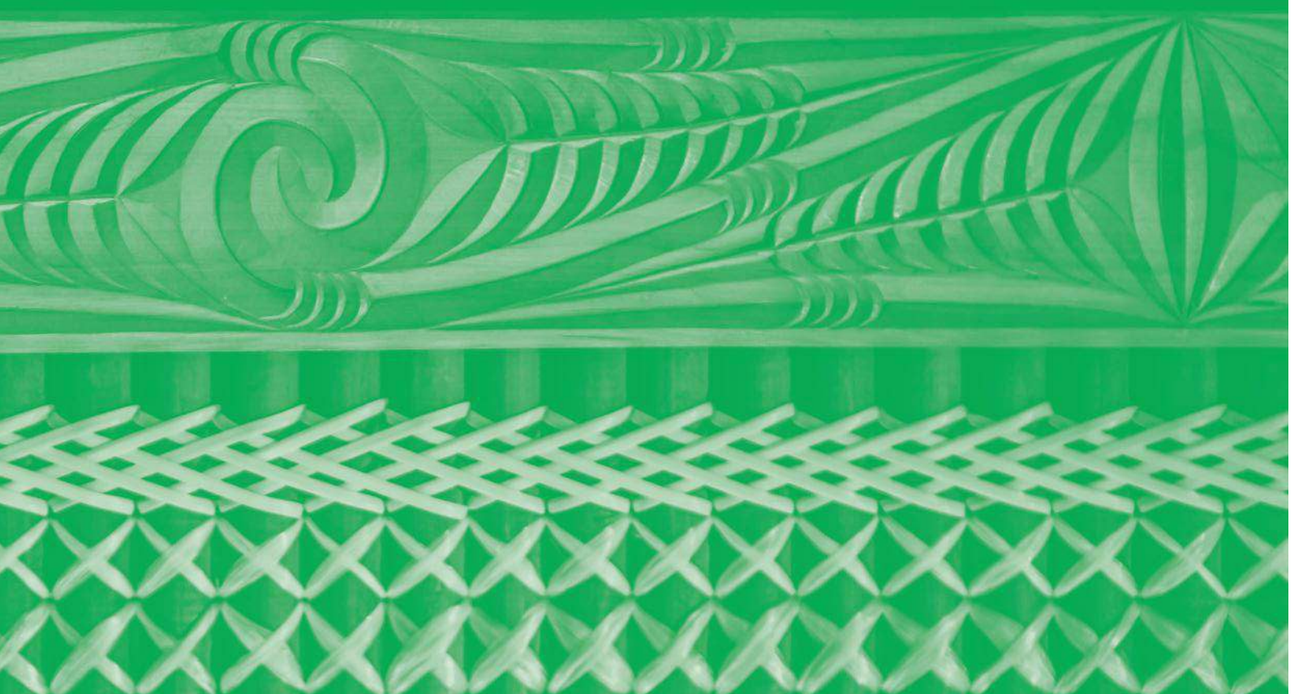
During a series of hui, members of the evaluation team took responsibility for bringing the findings from individual projects, which were themed according to the evaluation criteria. As part of an interactive process, data was examined, different perspectives discussed and shared interpretations reached. Through this process, important patterns and themes emerged. The evaluation team answered the key evaluation questions together. Reports were co-constructed and reviewed by all team members.

Figure 3: *Cycles of evidence and data synthesis*



III Overall findings

- Achievement of educational outcomes
- Cultural confidence and identity
- Value of project outcomes to Māori and Pacific communities
- Why and how the models work: Validation of specific Māori and Pacific cultural elements
- Sustainability and spread of successful models
- Influencing education policy
- Influencing philanthropy
- Ongoing learning and refinement of the high-engagement funding approach
- Economic return on investment



Achievement of educational outcomes

There is good evidence of educational success (according to the wider definitions used) for the majority of projects. (See Appendix A for summaries of each project.) For example, projects gathered evidence of increased whānau engagement, improved student attitudes and dispositions to learning, and enhanced student engagement and retention.

Where meaningful comparisons of academic achievement can be made, using publicly available achievement data, the relevant MPEI projects compare very well. Results certainly show Māori and Pacific young people performing better than equivalent year groups. For example, **The Leadership Academy of A Company** cadets performed at least as well or better than students in the Ministry of Education Rangiātea case studies and exemplars.

Educational outcomes were defined broadly for the evaluation of the initiative, including:

- students' attitudes towards school and learning (for example, reduction in unexplained absences, students want to be at school and are happy to be at school, come to school prepared for learning, actively participate in school activities)
- school or teacher attitudes toward students (for example, pronouncing students' and families' names correctly, rapport, trust, offering students more extra-curricular or leadership opportunities)
- cultural identity at school (for example, students feel good about being Māori or Pacific at school, teachers and students incorporate Māori and Pacific culture, knowledge and understandings into different subjects and connect learning activities to students' family or community)
- family engagement in school and learning (for example, family are made to feel welcome in the school, increased presence at school, participation in school committees or activities, engaging with teachers about their children's education)
- students leading their own learning (for example, proactively pursuing and finding out things over and above what sits in the course, doing additional work to grow their own knowledge in support of their interests)
- students' aspirations and goals are lifted (such as, a lift in career aspirations, researching career options, staying at school longer)
- academic achievement or grades
- career or employment outcomes.

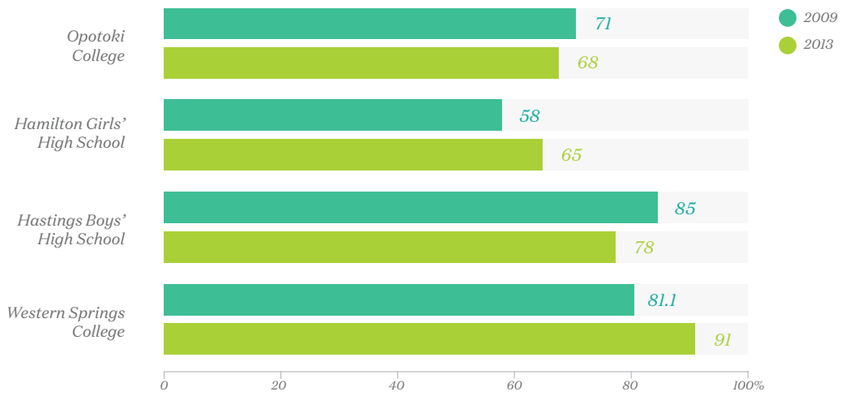
Academic achievement

Secondary school results

The Rangiātea case studies and exemplars examined secondary schools that "were on a journey towards realising Māori student potential."[5] These schools were selected as they showed higher than average Māori student retention and achievement for National Certificate in Educational Achievement (NCEA) Level 2 (**Figure 4**).

5 Ministry of Education (2011b) *Rangiātea: Case studies and exemplars*

Figure 4: *Percentage of Māori students that achieved NCEA Level 2 in Year 12 (Roll-based)*



A meaningful comparison can be made between these results and the NCEA Level 2 results of learners at **The Leadership Academy of A Company**. To date, 85% of the Academy cadets have achieved NCEA Level 2 in Year 12. This result is at least as positive as the results presented in the Rangiātea case studies and exemplars, and surpasses many of them.

The Leadership Academy's 85% achievement rate also compares favourably against national data. Māori Academy candidates, tracked from 2011, had an achievement rate for NCEA Level 2 in Year 12 of 65.4%. Two more Academy boys achieved the qualification the following year, taking the rate of achievement to 100%. This compares with 72% of the publicly available tracked cohort.[6]

In the absence of Pacific exemplars, the **C-Me Trades At School** NCEA achievement data can be compared against national rates. Comparisons can also be made against Pacific learner achievement in neighbouring schools.

None of the C-Me learners from the 2013 cohort had achieved NCEA Level 1 in Year 11. This compared with 58.1% of the C-Me Pacific students enrolled in Year 11 the previous year. In spite of this, all went on to achieve NCEA Level 1. Also, 93% achieved NCEA Level 2 and this contrasts strongly with other learners whose Level 1 achievement scores were below the mean. National NCEA Level 2 achievement rates for those lower performing learners still engaged at school sit at 63%.[7]

When these results are compared with the percentage of students leaving with a minimum of a Level 2 qualification, it is clear that the graduates from C-Me outperformed their contemporaries. **Figure 5** shows C-Me graduates compared with Pacific school leavers from a selection of South Auckland schools.[8]

NCEA achievement at the only secondary school in the **Manaiakalani cluster**, Tāmaki College, has increased steadily. The results for Level 2 have shown the most dramatic increase: from 29% achievement by Year 12 students in 2011 to 74% achievement in 2013.[9] These results compare well with other Auckland decile 1 to 3 schools.

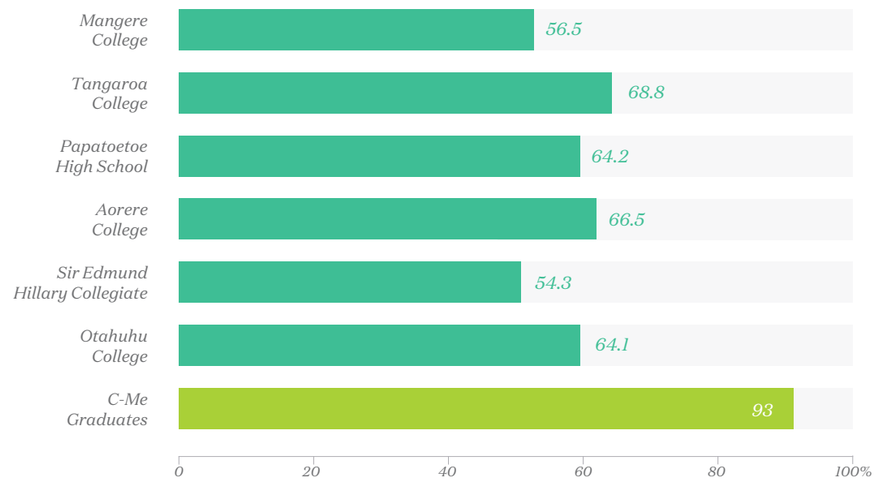
6 The achievement of boys at the Academy includes those who participated in NCEA from 2010 through to 2013. All cadets enrolled in school at Years 11 to 13 were counted. The national figure of 72% is from the New Zealand Qualifications Authority Annual Report on NCEA and New Zealand Scholarship Data and Statistics (2013)

7 Earle (December 2013) Monitoring the Youth Guarantee Policy 2010-2012, p. 32

8 Ministry of Education (2014) Education Counts: Find a School

9 Data included are for roll-based achievement from New Zealand Qualifications Authority (2013)

Figure 5: *Percentage of Pacific school leavers with at least NCEA Level 2 qualification (2013)*



It is difficult to know how much of this gain can be attributed to the Manaiakalani project, though there is some indication that the use of teacher dashboards has supported teachers to better understand individual student's credit records.

Primary school results

Results from the **Mutukaroa home-school partnership** project have demonstrated that targeted engagement with families and whānau can have a significant impact on achievement. In a recent conference paper, University of Auckland researcher Tony Trinick wrote:

> ***The longitudinal student achievement data showed that a significant percentage of the cohort of students who enrolled in Sylvia Park School [and] who were tested upon entry into school consistently tested at "Below" (that is, Stanine 0–3) from 2009 to 2012. In contrast to pre Mutukaroa (2009–10), after one year of participation in the Mutukaroa programme, the students had made significant gains. As can be seen in this chart, close to 97% of learners in Year 1 were assessed as at or above norms in Year 2.***[10]

In addition, Sylvia Park School witnessed unprecedented rates of progress in raising reading comprehension results for those students who had had a full three years of support by Mutukaroa.[11]

For schools in the **Manaiakalani cluster**, there was good evidence that "pockets of promising practice" had been extended more widely through classrooms across the schools. Accelerated achievement was evident in the majority of classes across the cluster for writing and almost half the classes for mathematics from Year 4 to Year 10.[12]

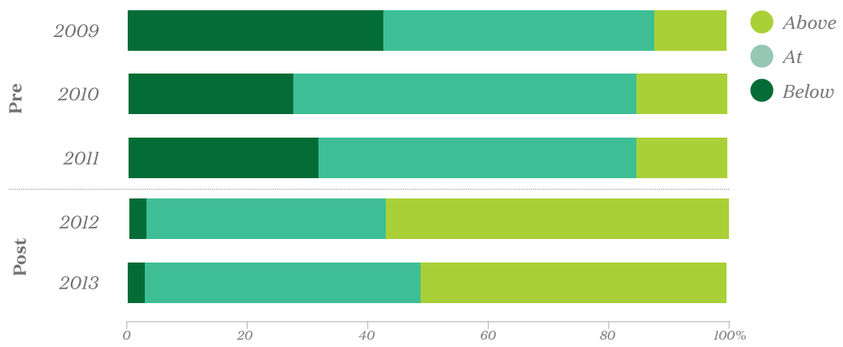
It was not possible to track the impact of the **Unitec programme** on young people's achievement in Pacific early childhood education (ECE) settings.

10 Trinick (2015), p.134

11 Trinick, Ala'alatoa, & Williams (2014) Mutukaroa, School and Community Learning Partnership

12 Jesson & McNaughton (2014) Manaiakalani Evaluation Programme

Figure 6: *Comparison of Year 2 reading and writing assessment results for Mutukaroa, 2009–2013*



However, the rate of achievement by those supported by Foundation scholarships was in line with national averages for Pacific people studying part-time at graduate diploma level.

Wider educational achievement

For all projects, there is good evidence of educational success, in its wider framing, occurring. Examples include changes in student attitudes to learning and life aspirations, whānau engagement in education, whānau aspirations for themselves and their children, improvement in family functioning and relationships, digital literacy, and better student engagement and retention.

Fundamental to **Mutukaroa's model** was research demonstrating that strong and sustained achievement gains can result from effective partnerships between families and schools with a focus on students' learning.[13] Research on this pilot initiative concluded:

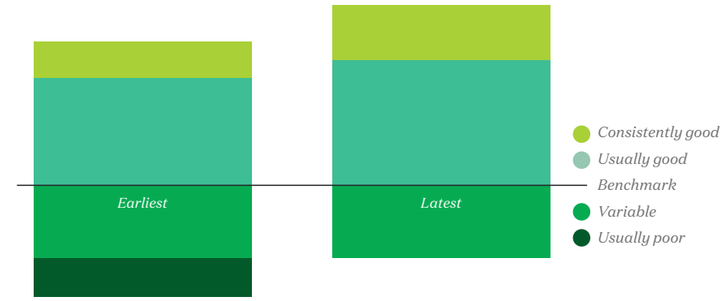
> ***Parents are continuing to report a better understanding of assessment tools and how to help their children with their schoolwork at home. Consequently, parents and teachers report there has been a change in home practice in regard to student learning. We can say from the survey responses, parents are more confident in interacting with staff and asking questions about their children's learning. The respondents surveyed so far indicate that this programme helped build [a] positive relationship with the school.***[14]

For the young people who engaged with **Ideal Success,** analysis of school report data for the first three cohorts shows encouraging trends in attendance, engagement with learning and social skills. **Figure 7** shows changes in engagement with learning. (Time periods between the earliest and latest school report range from approximately 1 to 4 years.)

13 Alton-Lee (2003) *Quality teaching for diverse students in schooling: Best evidence synthesis,* pp. 38-44; see also literature review by Desforges & Abouchaar (2003) on impact of parental involvement on pupil achievement

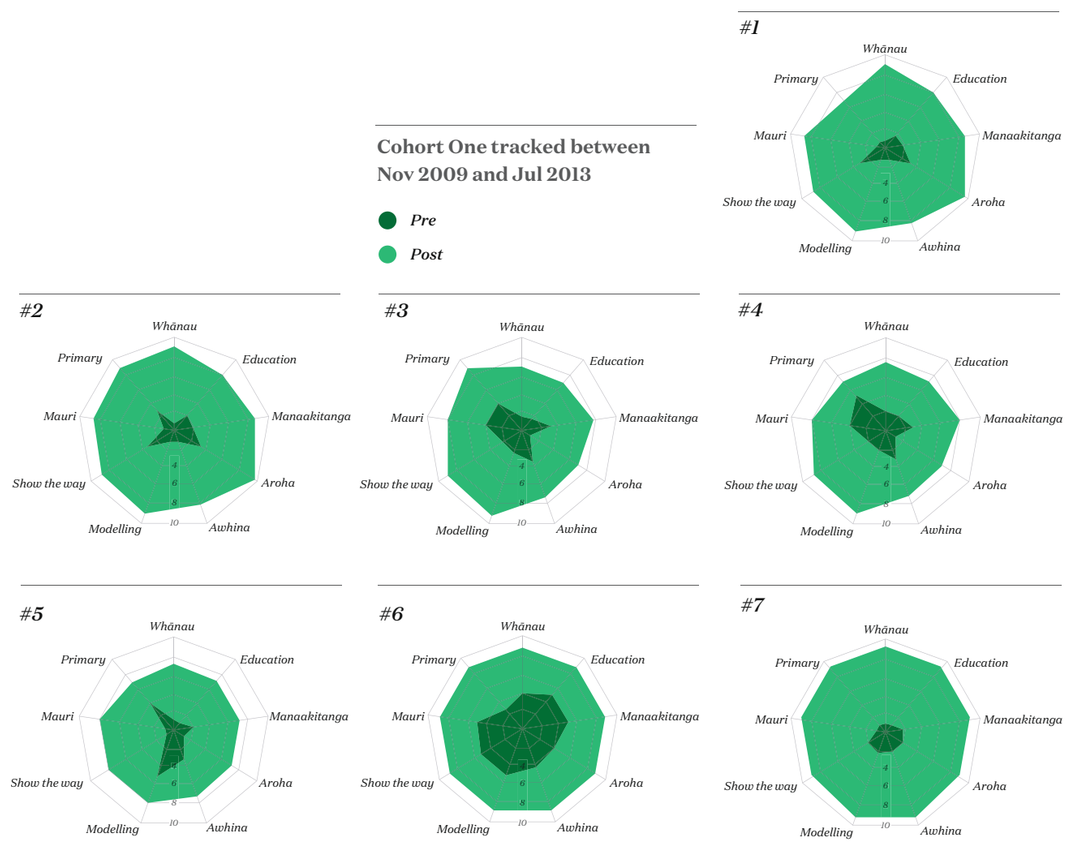
14 Trinick, Ala'alatoa, & Williams (2014)

Figure 7: *Engagement with learning has improved over time (Ideal Success)*



The evaluation team developed an evaluative rubric with Ideal Success to assess and chart the journeys of the young person and their whānau and to provide a transparent basis for making evaluative judgements about the status of young people (tamariki) at different points in time against nine dimensions drawn from the Ideal Success outcomes framework. The results show all the young people making significant shifts (**Figure 8**).

Figure 8: *Results for Ideal Success Cohort One show considerable progress*



The young people have shifted from being at high risk - that is, a high likelihood of intervention from agencies such as Child, Youth and Family, Truancy, Police or Justice; being in trouble at school; and possibly being engaged in drug or alcohol abuse and violence. They are now turning up to school every day, are ready to learn and have better learning habits, plus their achievement has improved.

Rise UP Trust's project analysis of whānau case studies and focus group data indicated positive changes, including:

- improved whānau interactions (parent to child, parent to parent, and wider family)
- raised aspirations for children and family
- confident, secure children (for example, children delivering speeches to the whole school, asking questions, correcting mistakes in homework independently, performing cultural dances, participating in choirs or school groups)
- children and whānau becoming stronger in their identity and culture
- increased whānau engagement in school (for example, more confidence to ask questions of teachers)
- increased whānau engagement in their children's learning (for example, gaining skills and knowledge to be good teachers to their children and support them in their learning)
- increased student engagement in learning, leading to improved academic and non-academic achievement, greater aspirations, and becoming more caring and critical thinkers.

Rise UP's programme data also records that a number of children who have participated in the programme are achieving at high levels at school in 2012, as well as families functioning more effectively and children gaining confidence and belief in themselves.

Cultural confidence and identity

In most of the initiative's projects, culture was embedded within the project philosophy and way of working. Evidence was able to confirm that the projects contributed to validating and affirming young people's cultural confidence and identity.

The participants experienced their culture being validated and celebrated both outside the classroom and within. For example, the cultural capital that Otara youth bring to the games, videos and animations they create is celebrated and valued by not only their **High Tech Youth Network** (formerly Computer Clubhouse) tutors but also industry stakeholders who support the training and offer internships. The young children's cultural gifts are studied and celebrated through **Rise UP**'s programmes. "Be Māori" is a key plank of **The Leadership Academy of A Company**, with strong Māori leaders acting as key role models for the boys.

The Māori projects strongly embody the principle of "by Māori, for Māori, as Māori", such as in the significant "Be Māori" plank of **The Leadership Academy of A Company.** The **Māori into Tertiary Education (MITE)** pipeline project monitors potential employers for cultural safety aspects before placing graduates. It is also evident in the Huarahi Tika programme being run by **Ideal Success Trust** in the support for families to explore whakapapa as part of a journey to wellness.

All the projects demonstrate culturally distinct aspects of service provision within their education models. For example, philosophies and ways of working evident in the Māori projects include whanaungatanga (the building of relationships) and manākitanga (nurturing relationships, looking after people and being very careful about how others are treated), as well as approaches that are kanohi kitea (which focuses on the importance of meeting people face-to-face), and mahi-a-whānau (working with families).

Teu le va principles[15] underpin the operation of the Pacific projects. This is evident in the strong focus on the moral, ethical and spiritual dimensions of relationships with all key stakeholders. Reciprocity and service elements are also strong. Examples include the Servolution programme run by **Rise UP Trust** and the "Recycle success" message emblazoned on jackets given to **C-Me Trades At School** graduates.

Culture is also reflected in the pedagogy and approaches the projects adopted. For example, the use of Pacific study groups, initiated at the **Unitec Graduate Diploma in Not-for-Profit Management**, enabled the students to learn in a recognisably Pacific space. The **Rise UP Trust** has adopted enquiry-based learning as a model that works especially well with their Pacific learners. **High Tech Youth Network's** deliberate use of sociocultural constructivism as the guiding pedagogy and **Manaiakalani Education Trust's** model of "learn, create, share" are further examples of projects finding culturally relevant models of learning.

15 Airini, Anae, Mila-Schaaf, Coxon, Mara, & Sanga (2010) *Teu Le Va - Relationships across research and policy in Pasifika education*

Where comparisons can be made, the majority of projects do show better educational outcomes than other exemplars.

Key traits shared by successful projects include the following.

- There is a strong belief in the inherent capabilities of the learners, and learners are nurtured and affirmed as they move towards their goals. High standards are set and met.
- There is an unapologetic belief that cultural identity is central and critical to wellbeing and educational achievement.
- There is a focus on contributing to whānau and young people's resilience as a key part of the educational journey.
- Projects ensure that whānau and young people are supported to develop specific knowledge and skills that will enable them to negotiate the education system effectively.
- The child is never isolated but always identified as part of a whānau or wider family group, hapū or iwi. Engagement with whānau and families is meaningful and sustained.
- Trusted relationships with aroha and engagement are at the heart of the learning. Change occurs within and because of the relationships formed.
- Literacy and numeracy are seen as means to an end, and not an end in themselves. Educational goals are therefore set that go beyond the achievement of certain literacy, numeracy or achievement standards. Examples include growing "good young men" or "young people who can contribute to their families and communities".

Not all projects have achieved all of their educational goals, and a range of factors can be identified that have influenced this.

- Timeframes are critical. Five years has proven to be a relatively short timeframe, particularly when the outcomes being sought are long-term. For example, for some young people and their whānau, it has taken years to get them "ready to learn".
- Adverse and unexpected events have impacted upon some projects. For one project a key staff member passed away, and this left a gap that was difficult to fill. For another project, after a shift in policy that impacted financially on the position of key stakeholders, funding for the MPEI project was pulled.
- In the case of **Unitec**'s Graduate Diploma in Not-for-Profit Management, finding the right candidates to participate in the programme proved difficult under narrow funding criteria. The success the programme usually enjoys with Pacific learners was not mirrored in those who came under MPEI scholarships from early childhood education settings.

Value of project outcomes to Māori and Pacific communities

The evaluation team saw a range of evidence that demonstrated that the vast majority of projects were achieving outcomes valued by their families and communities. A range of evidence collected across the projects included data on expressions of interest and enrolments; attendance at events including orientations, information nights and graduation ceremonies; whānau focus groups; and stakeholder interviews. The spread and scale-up of a number of the projects is also a strong indicator of the projects' outcomes being valued.

For **C-Me Trades At School** and **The Leadership Academy of A Company**, whānau interest in enrolling their young people and attendance at events were strong indicators that outcomes were being valued. For Trades At School in the first year, 18 students enrolled. By 2013, with over 300 applicants, that number had grown to 48. In 2011, Trades At School was working with just six schools; by 2013 that number had grown to 17. The buy-in from the community and whānau in **Manaiakalani** schools is clear. Schools first have to gain the support of their board of trustees and then the parent body has to begin to contribute financially. That over 80% of parents from low-income families (average income $19,000) continue to contribute regularly to this project indicates they value the outcomes that they can see for their children.

Whānau feedback reflected strong support for the outcomes being achieved by the projects.

One parent of a Leadership Academy cadet related:

> *"I can see in the future our son will be able to speak for us on marae; he will be able to welcome people on and do the wero with his taiaha. He won't be held back, feeling too shy to step forward."*

Rise UP family members shared some of their experiences of valued outcomes for their families:

> *"[Rise UP] just enabled me to go to the parent–teacher interviews and ask constructive questions ... Had I not asked the right set of questions [my daughter] would have been in the wrong class, not learning anything. The teacher said, 'No, she's naughty' and no, she's not naughty, she was bored."*

Another family member said:

> *"It's sort of gotten a lot more peaceful, a lot less yelling, especially around homework time ... Before I would ... just point out mistakes to him and I wouldn't praise all the good stuff he's done; I would just point out the negative. So now, I praise him, I focus on the positive stuff and all that has helped him get confidence within himself."*

An evaluator reflected on an evening spent running a focus group with Ideal success/Ngā Huarahi Tika whānau. She wrote:

> *"Last night whānau validated that the way you [the project] work with them and for them adds value to their lives. In particular, whānau valued the lengths that you go to to ensure their wellbeing. They loved the fact that you just show up: to mediate on their behalf; to mentor and instruct them; to assist them in getting work, getting to school, engaging well with each other and others.*
>
> *One whānau, who had seven children all at school, absolutely appreciates that you have been able to help with school uniforms for their children over the last four years. Another whānau loves how you understand their medical situation and how you are always there for their kids when they are usually in hospital, this same whānau appreciates you being there when he comes out of surgery.*
>
> *One whānau appreciates the counselling that you have gotten for them and noted that because of this they are able to support their own kids better. Parents and grandparents noted that their kids always look forward to coming here and are reluctant to come home. Another whānau appreciated the healing support you gave when they were in mourning and notes that as a result of your intervention, she and the kids were able to start healing. All the whānau noted how you are available after hours when they need help with their kids and how a couple of words from you changes their child's whole demeanour."*

Interviews conducted with community stakeholders also attested to the value of these projects, often seen as addressing an unmet need in the community.

A local deputy principal said of the Leadership Academy cadets:

> *"Other boys see that they are confident learners and successful in the school and they're also competent in their culture, and that has a positive rub off ... This will stay with them for the rest of their lives. So from a community point of view, as New Zealanders, this is really important ... The ripple effect through our whole society as these young men come through is really important."*

Another deputy principal said of Ngā Huarahi Tika:

> *"Ngā Huarahi Tika is having a big impact. At least 50 percent of our children participating in the programme are at risk of being excluded from school, and without it these kids would be gone from school."*

A principal was unequivocal about the value of the Manaiakalani Trust:

> *"Having the professional development support from Manaiakalani Trust is really important. It is also about creating leadership opportunities for staff. This is taking actual teachers and allowing them to be innovative ... Without the cluster, I wouldn't have the support for all those things that we spoke about earlier on. There wouldn't be that key person in professional development, there wouldn't be the key person in finance, there wouldn't be the key person for chasing the funding, there wouldn't be the key person for talking to the outside bodies like the council for getting this vision moving. There wouldn't be the input from individual schools to all of those people about what we need as individual schools."*

Another strong indicator of whānau and communities valuing the projects' outcomes is the demand for the projects to expand and scale-up. **The High Tech Youth Network** has expanded from its base at Kia Aroha College to new centres in West Auckland, One Tree Hill College and Fiji. By late 2011, **Mutukaroa** began attracting early interest from other school principals who were keen to try to adapt the model to their context. Discussions with the Ministry of Education began in 2012 and by late 2013 the first phase of the adaption and expansion into 110 schools began. The MPEI funding has also supported expansion of the **Manaiakalani** model. The initial cluster was built up to include 12 schools, and there are now four other clusters that mirror the Manaiakalani model and two more clusters developing.

It is clear, through the voices and buy-in from whānau and key stakeholders, that whānau and communities highly value the outcomes for their children and their families. It is notable that for a number of projects, whānau perceive that the educational value flows from building confident families.

Why and how the models work: *Validation of specific Māori and Pacific cultural elements*

The majority of the projects have a clear rationale for how their model is intended to work. These rationales or theories of change are for the most part strongly supported by research evidence and established success frameworks.

MPEI projects' rationale/theories of change in a nutshell

The Leadership Academy of A Company has a clear outcomes framework—Be Māori, Be Rangatira, Be Educated—which is underpinned by a rich historical legacy and Māori philosophy. This framework guides all programme planning, development and delivery. The evaluation has collected a diverse range of evidence, including feedback from management staff and cadets, photovoice, a digital story, collated cadet achievements and education data. This evidence demonstrates that the programme has contributed to positive outcomes against all three of the foundational programme components (pou).

A navigational chart and a set of principles, underpinned by cultural knowledge and expertise as well as research, guide **Rise UP**'s programme development and delivery. Rise UP has embedded data collection and evaluative thinking across its organisation, and this supports and informs its ongoing development as well as its accountability.

Ideal Success developed a culturally rich outcomes framework that is underpinned by Māori philosophy and principles. The framework articulates a number of aspirational change dimensions for whānau and young people. Shifts and changes made by each young person, and his or her whānau, have been carefully tracked against the framework's different dimensions.

From the beginning, the CEO of **C-Me Trust** could articulate the model of guidance and mentoring ("it takes a village to raise a child") that underpins the work of C-Me Trades At School with participating young people and their whānau. Founded on deep cultural knowledge and experience, this model has been formally documented and educational data and feedback from learners, graduates and stakeholders attest to the success of the model.

Mutukaroa charted its programme outcomes from the beginning, expressing the well-documented view that whānau engagement in children's learning is the key to Māori and Pacific young people's education success. The key outcomes for different stakeholders, including learners, teachers, boards of trustees and community, were monitored and tracked through a long-term research project that ran alongside the programme. This research demonstrates that Mutukaroa has contributed to learners and whānau achieving educational success.

High Tech Youth Network has a clear rationale, and this is informed by extensive research and evaluation of indigenous and overseas delivery models. A great deal of effort has been put into building an evidence base about how and why the approach works in the New Zealand context, although at this stage this evidence is still emerging.

MITE's theory of change was developed with the support of the evaluation team. From this project's inception, the model has been continuously adapted to match shifting operational, policy and funding contexts. While the project has now been reconfigured, it retains the rationale of supporting Māori learners through the tertiary environment into employment. There is some early evidence that attests to the value of support provided by MITE which resulted in people gaining employment.

The **Manaiakalani** approach includes several key dimensions: building digital citizenship within high-needs communities through technology enablers; the provision of professional development for teaching effectiveness; the implementation of a learn–create–share pedagogy; and students learning through family engagement. The value of research and evaluation has been well understood, and there is evidence that research has informed improvements and adaptions of the approach as well as teaching practice that has had an impact on achievement. (The impact of culture on the success or otherwise of this project has not been specifically considered.)

The **Unitec** model, which is based on providing not-for-profit management skills for those working in the early childhood education sector, struggled to meet the needs of the key target group for the MPEI funding—that is, Pacific workers. It could be argued that the impact and value of this project was great for the few who completed the course. However, for most of the women participating early on (and most of the participants were women), the challenges of juggling family, work and study commitments were tough and proved costly for many of them. The programme model was not able to adapt to meet their needs, and even when it tried to shift the target group—to board members of early childhood organisations—only a small number of students completed the course. Unlike the other MPEI projects, the project model and idea did not emerge from the community being addressed; rather, it was an existing approach that was moulded to fit the initiative's criteria.

Māori and Pacific theories of change

The components or change elements of the initiative projects have been analysed with reference to the kaupapa Māori principles found in *Ka Hikitia*, the writing of Graham Smith and of Angus Macfarlane; and a set of Pacific principles sourced from the Ministry of Education's *Pasifika Education Plan 2009-2012*.[16]

The strategic intent of the 2009 Māori Education Strategy *Ka Hikitia* is Māori enjoying education success as Māori.[17]

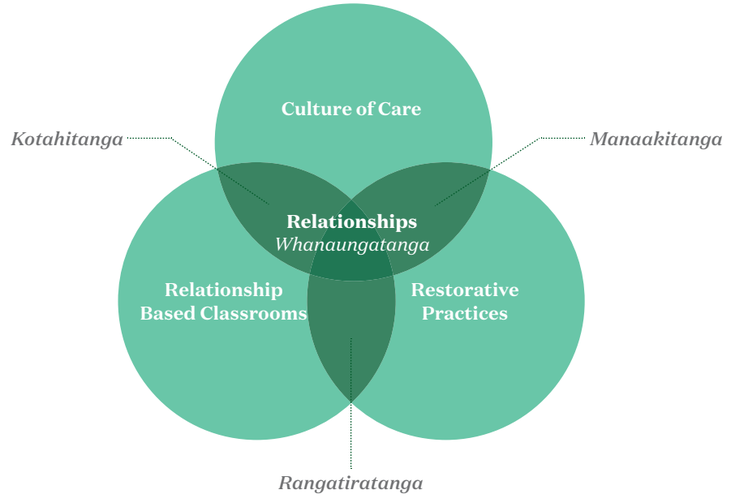
This evidence-based strategy approach focuses on:

- Māori potential, cultural advantage and inherent capability
- Ako which acknowledges the significance of:
  - language, identity and culture—knowing where learners come from and building on what learners bring with them
  - productive partnerships—Māori learners, whānau/families, iwi and educators working together to produce better outcomes.

16 Ministry of Education (2010) *Pasifika Education Plan 2009–2012*

17 Ministry of Education (2008) *Ka Hikitia—Managing for Success*

Figure 9: *Components for creating culturally safe classrooms*



Adapted from Macfarlane, Glynn, Cavanagh, & Bateman (2007), p.70

The new strategy, *Ka Hikitia—Accelerating Success 2013–2017,* notes that the earlier strategy had at best achieved "pockets of success", with "implementation being slower than expected". The current strategy calls for "local solutions for local change, by local communities".

It identifies two critical factors that will make the biggest difference to Māori students' achievement:

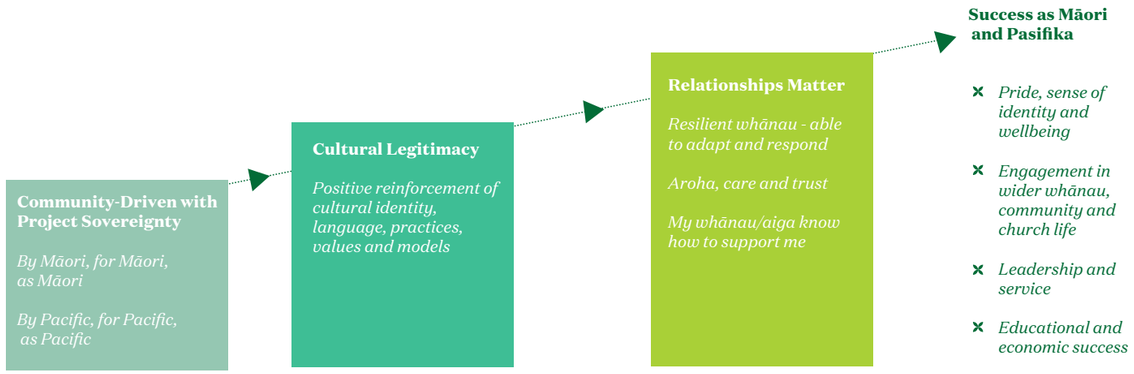
- quality provision, leadership, teaching and learning supported by effective governance
- strong engagement and contribution from parents, families and whānau, hapu, iwi, Māori organisations, communities and business.

The work of Angus Macfarlane and colleagues identifies key components for creating culturally safe classrooms as shown in **Figure 9.**

The *Pasifika Education Plan* (2009–2012) outlines key aspects of Pacific culture:

- Pasifika can have multiple worldviews with diverse cultural identities and may be monolingual, bilingual or multilingual
- Pasifika people value and respect elders and leadership, and build and lead strong relationships through service
- Reciprocity is a way of life, where one's location, connectedness to family and community defines one's wellbeing, sense of belonging, identity and culture.

Figure 10: *A theory of change for Māori and Pacific educational success*



The evaluators found clear synergies between the initiative projects and the principles and dimensions for educational success outlined in these guiding documents.

Across the different projects, three dimensions emerged as keys to success for Māori and Pacific education. They are:

- being community-driven with project sovereignty
- cultural legitimacy
- relationships matter.

Community-driven with project sovereignty

The Foundation deliberately sought projects that were from the communities it aimed to serve. This strategy aligns with kaupapa Māori principles of self-determination or relative autonomy. The majority of the projects funded by the MPEI have developed from the community in response to needs identified in and by the community. It is significant that Māori and Pacific people lead the majority of these projects. In the faces and in the actions of the leaders of these projects, young people and their families can see and recognise the transformational change they can have, for themselves and their communities.

School principal Ann Milne wrote:

> ***If tweaking school environments to better reflect our "diverse" student population, with one-off cultural meals or weeks, bilingual or multilingual signage, bilingual programmes, a kapa haka group and the like, really made a difference for Māori and Pasifika learners, we would already have different results.***[18]

The MPEI projects have moved beyond these manifestations of cultural diversity to something more intrinsic and sustainable. Learners and young people have effectively been enabled to achieve as Māori, as Samoan, as Tongan, as Niuean and so on.

18 Milne (2009) *Colouring in the white spaces: Cultural identity and learning in school*, p. 49

Table 2: *MPEI provider perspectives on project sovereignty*

For Māori providers:	*For Pacific providers:*
Gives authority (mana) to Māori providers and communities to develop their own models and ways of working	Provides for Pacific-led programmes and services using Pacific approaches
Ensures being Māori is a core element of what creates change; that is, teaching our children what the essence of "being Māori" is, and what Māori values such as manāki are	Brings Pacific cultural knowledge and upbringing to the work with Pacific families, which is at the heart of what is needed to understand the underlying nuances behind a situation
Gives effect to Treaty principles; that is, working towards ensuring the programme funding is protected, working in partnership with the funder and the providers, ensuring ample opportunities for participation in strategic and tactical decision making	Means that there is a culturally specific and appropriate understanding of the context of the struggles and poverty issues facing our families
Influences systems and pathways to be responsive to Māori	Allows providers to do things in a Pacific way, sharing our culture so it can be passed on to the next generation
Ensures the environment within which Māori develop and learn is taken into account, and in particular where the "start line" is for them, which is not the same as for non-Māori	Ensures we can model Pacific leadership—essential for our success and sustainability
Ensures the time it takes to engage with Māori students and whānau at the beginning of the journey is acknowledged	Meaningfully embraces our culture, and supports connections with family
	Means we can legitimately make a spiritual connection, and go to the core of our beliefs
	Ensures there is belief and recognition that parents want the best for their kids and that there is potential in every individual

The projects are strongly by Māori for Māori and by Pacific for Pacific—which means that providers already have core cultural competencies, contextual understanding of their communities and appropriate delivery of services. This results in greater engagement and buy-in to the necessary change processes required for whānau and aiga to successfully support educational achievement by their children.

Table 2 provides examples of the initiative providers' perspectives on the importance of project sovereignty.

Cultural legitimacy

Young people's culture is legitimised and celebrated in all the MPEI projects. All the projects have a fundamental belief in the cultural advantages and inherent capabilities of the young people of their communities. They set high expectations for the young people's learning and achievement and ensure that they are getting regular useful feedback on their progress. For example, as already noted, the cultural capital of the Otara youth creating games, videos and animations in the **High Tech Youth Network** is celebrated and valued not only by their tutors but also by industry stakeholders supporting the training and offering internships. The cultural gifts that the young children have are studied and celebrated through **Rise UP**'s programmes.

The projects demonstrate the use of culturally grounded pedagogy as well as culturally responsive teaching, educational leadership, learning contexts and systems. For example, as noted, study groups for Pacific students, initiated at the **Unitec** Graduate Diploma in Not-for-Profit Management, enabled the students to learn in a Pacific space. The **Rise UP Trust** adopted enquiry-based learning as a model that worked especially well with Pacific learners. **High Tech Youth Network**'s guiding pedagogy of sociocultural constructivism and **Manaiakalani**'s model of "learn, create, share" were other examples of culturally relevant learning models that projects used.

The people leading the projects and working within them hold important cultural capital, knowledge and credibility, enabling them to be trusted by whānau and by the young people. They positively and meaningfully engage with parents, family and whānau/aiga, communities and wider support networks, and they celebrate and encourage expression of culture, for example, through the use of language. All these factors are known to contribute to educational success.[19]

The people leading the projects and working within them hold important cultural capital, knowledge and credibility, enabling them to be trusted by whānau and by the young people.

As noted in the findings section on *Cultural confidence and identity* above, many of the projects demonstrated culturally distinct aspects of service provision, including philosophies and ways of working from a kaupapa Māori perspective, such as whanaungatanga (the building of relationships), manākitanga (nurturing relationships, looking after people and being very careful about how others are treated), kanohi kitea (which focuses on the importance of meeting people face-to-face) and mahi-a-whānau (working with families).

Māori providers told the evaluators that cultural legitimacy is all about:

- developing cultural identity as Māori, as the basis for leadership and educational achievement
- aiming to be Māori, be rangatira, be educated
- developing the ability to articulate and express cultural strengths and who they are
- supporting rangatahi to discover their whakapapa as well as their aspirations, access their marae and link them to their tūrangawaewae
- utilising cultural values and practices such as manāki, awhi, akiaki, kanohi ki te kanohi, wairuatanga, te wā, tuākana teina, koha, tauutuutu, whakapapa and whakawhanaungatanga.

Teu le va principles[20] underpin the operations of the Pacific projects, as noted in the section on *Cultural confidence and identity* above. This was evident in the strong focus on the moral, ethical and spiritual dimensions of relationships with all key stakeholders. Reciprocity and service elements were also strong. Examples included the Servolution programme run by **Rise UP Trust** and the "Recycle success" message on jackets given to **Trades At School** graduates.

Pacific providers told the evaluators that cultural legitimacy is all about:

- developing a sense of identity and purpose, knowing who they are and where they are going
- understanding there is a continuum of cultural experience according to how strongly their culture was influenced by Pacific and New Zealand culture
- developing young people's belief in themselves and what they are good at.

19 Ministry of Education (2011a) *Ka Hikitia* Measurable Gains Framework logic model; see also Smith (2003) Indigenous struggle for the transformation of education and schooling; and Ministry of Education (2010) *Pasifika Education Plan 2009–2012*

20 Airini et al. (2010)

Relationships matter

Māori and Pacific whānau and aiga want their children to be successful in the fullest sense—they want them to be both connected to who they are as Māori, as Tongan, as Samoan, as Niuean and so on, as well as educationally successful.

Ka Hikitia[21] highlights the importance of partnerships with whānau, language, identity and culture, knowing where learners come from and building on what learners bring with them.

A key contributor to whānau engagement for both Māori and Pacific projects was that whānau and aiga felt that the providers had aroha and cared for them; they were non-judgemental and inclusive. Providers talked about seeing those they worked with as whānau: "We do what we do as if they were our own whānau."

A significant number of the projects (Māori and Pacific) explicitly link educational success to the importance of strong, healthy, enabled whānau, aiga and families. The primacy of the whānau has seen projects direct activity towards ensuring the strength and support of families.

Ideal Success Trust's Ngā Huarahi Tika project has worked across a number of wellness domains, including economic, social and housing, to strengthen family resilience—which has a direct impact on the child's ability to learn. Evidence from the focus groups, the digital story and evaluation of whānau journeys against the organisation's outcomes framework has shown families have been strengthened and this has had an impact on educational achievement. As one parent noted:

> ***"He wasn't very confident; he used to be back in the corner, but since he's been here [Ngā Huarahi Tika], he stands proud, his back is straight. He's got confidence now, and I put it down to what he learns here. He's always got questions now; he's got the confidence to speak and ask questions. We put it down to what he's learning here. His reading, writing, spelling and maths is back on track; as a matter of fact he's advanced."***

Sylvia Park Primary's **Mutukaroa** school and community partnership project aims to empower children and parents to understand student learning, enable families to support students' learning and challenge the school to be more responsive to whānau inquiries. Parents value Mutukaroa and the support it provides to help them support their child's learning effectively. The research shows that the work of the Mutukaroa support staff is a key contributing factor to parents' ability to participate and engage in the portfolio and three-way conferences,[22] and that consequently students are making accelerated gains in their learning.

Rise UP Trust's programmes target families from across generations. Data indicates that the programme's impact includes better family connectedness, higher academic achievement and greater engagement of whānau in their child's education.

21 Ministry of Education (2008)

22 Trinick, Ala'alatoa, & Williams (2011, November) *Mutukaroa: Sylvia Park School and Community Learning Partnership*

A number of the MPEI projects emerged from a frustration that the mainstream education system was not effectively engaging their youth. These projects are led by passionate people with a sense of urgency about creating the step change themselves, for the sake of their families and communities.

Manaiakalani's project is heavily dependent upon whānau engagement, particularly as they contribute to one-third of the cost. Early evidence suggests that the use of netbooks was helping whānau become more engaged in their children's learning. For example, young people are teaching whānau how to connect through social media. Parents are also connected, through the netbook, to their child's learning and teachers. Approximately 40% of whānau have participated in the free whānau training programme.

An Education Review Office report in August 2012 identified issues across a range of learning areas and contexts, and in a significant number of primary and secondary schools, which negatively influence Māori and Pacific learners' opportunities to achieve. These include the need to shift to more student-centred learning, a more responsive and rich curriculum based on students' strengths and interests, and using assessment information for learning.[23]

A number of the MPEI projects emerged from a frustration that the mainstream education system was not effectively engaging their youth. These projects are led by passionate people with a sense of urgency about creating the step change themselves, for the sake of their families and communities.

Relationships and productive partnerships are a key aspect of all the projects. The learner or young person is always viewed as part of their whānau/aiga and community, and relationships are deliberately and proactively nurtured and valued as significant enablers of the achievement of the child or young person.

For example, ensuring students form a meaningful relationship with a mentor while navigating the education and employment pathway is a key component of the **Trades At School** change theory. **Mutukaroa** aims to ensure that families have meaningful relationships with their child's teacher, promoting powerful learning conversations that enable them to engage effectively with their children and support their achievement. All the projects demonstrated a commitment to developing more responsive, creative and rich curriculum and learning experiences, based on the strengths and interests of students and their whānau.

Examples include the use of technology and the strong industry links in the **High Tech Youth Network**, and **Mutukaroa**'s deliberate support for whānau and learners to understand their assessment and next steps for learning. **The Leadership Academy of A Company** (He Puna Marama) implemented individual learning plans with all cadets, and their strengths and goals were regularly reviewed for progress.

C-Me Trades At School mentors young people and provides them with opportunities to begin their trade and gain work experience while still in school. **Rise UP** celebrates culture, service and families through enquiry learning models. **Manaiakalani** uses netbooks to give young learners access to the worldwide web and engage them as they "learn, create and share".

23 Education Review Office (August 2012) *Evaluation at a glance: Priority learners in New Zealand schools*

Sustainability and spread of successful models

One of the initiative's criteria for evaluating performance was whether government and communities (including schools and iwi) implement successful models pioneered through its projects. This criterion has been met, as the majority of programmes have been adapted and expanded.

Further criteria outlined the expectation that government (that is, Ministers and departments) or communities show an interest in the models, or that the initiative enables the Foundation to engage in other kinds of significant policy dialogue that would not otherwise have been possible.

Models pioneered through the initiative have had an impact on funding decisions. It is not clear that the initiative has enabled the Foundation to engage in other significant policy dialogue that otherwise would not have been possible. This is particularly the case when the project matched existing policy settings.

It is notable that a number of the projects have been adapted and expanded into other communities. Other organisations and government have extended funding to the models pioneered through MPEI. The projects have attracted significant interest from government, including senior Ministers and officials, that in some cases has resulted in sustainable, long-term funding.

A significant number of the projects, including Manaiakalani, Mutukaroa, The Leadership Academy of A Company, High Tech Youth Network, Ideal Success, Rise UP and C-Me Trades At School, have attracted the attention of government departments and Ministers. For some MPEI projects, this support was leveraged to secure funding. The most significant of these are the He Puna Marama Trust's **The Leadership Academy of A Company** and **Rise UP Trust**, with both becoming Te Kura Hourua/Partnership Schools. Most recently, He Puna Marama has received approval for funding for a second primary Te Kura Hourua. It could be argued that the policy settings for partnership schools aligned well with the project sovereignty and self-determination components of the MPEI projects.

The **Mutukaroa** and **Manaiakalani** models have also attracted significant attention. During 2014 and 2015, the Mutukaroa home-school partnership model was being adapted and expanded into 110 schools across New Zealand. While the funding for the roll-out is finite, early evidence indicates that a number of schools will fund Mutukaroa from their baseline funding. Manaiakalani has also attracted significant interest from other schools and the Ministry of Education. Some adaption and expansion was made possible by funding through the Ministry of Education Learning and Change Network. In addition, the Ministry of Education has put resources into building teacher capability. Some corporate sponsors have also supported the project. Manaiakalani is still looking to secure funding to support the expansion of the model into other communities.

High Tech Youth Network has continued to attract both corporate and government funding. With the development of the network, it has been possible to adapt the model and expand into other communities, including West Auckland, One Tree Hill College and Fiji.

While **C-Me Trades At School** has experienced ongoing interest from other education organisations, industry and government, it has struggled to secure further funding. However, recent changes to policy have resulted in Trades At School being part of two consortia to support Māori and Pacific learners through their tertiary education and into employment. In addition, they are partnering with a large secondary school and polytechnic to offer Trades At School to learners in the community who are at risk of not succeeding in school. This partnering provides sufficient funding for the programme to continue.

For the phase two projects, **High Tech Youth Network** and **Manaiakalani**, Foundation North funding was provided to enable the providers to expand and strengthen their role as "backbone" organisations. Both these programmes have used their funding effectively to build systems and processes to enable them to support an effective scale-up.

Two projects, **Ideal Success** and **MITE**, are yet to secure sustainable long-term funding. Ideal Success has had links with Whānau Ora providers, and those links could continue into the future. MITE has had a shift in purpose and personnel, and they are still working to build their service provision model. They do have links with a Māori and Pacific trades training consortium that will provide some limited funding.

The **Unitec Graduate Diploma in Not-for-Profit Management** is a successful programme that Unitec will continue to offer, both in Auckland and in the Pacific Islands. The programme is eligible for student achievement component (SAC) government funding, and there is no reason to believe this will change. In addition, the programme has attracted corporate and NZ Aid funding so it can be run in the Pacific. It is unlikely the programme will seek alternative funding to replace the scholarships that were intended to build capability in Pacific ECE centres.

In conclusion, all but two projects have sustainable, long-term funding and are set to continue. For the sustainable phase one projects, the model they are continuing with is an expansion and adaption of the model initially funded by Foundation North. For the phase two projects, the Foundation funding enabled the successful expansion and adaption of a model already trialled.

... all but two projects have sustainable, long-term funding and are set to continue.

Influencing education policy

One of the initiative's goals was to influence education policy in New Zealand. The expectation was that the innovative projects that were being piloted with the Foundation's support would gain recognition and influence policy with respect to lifting achievement for Māori and Pacific youth. It is not clear that this has occurred. However, it is clear that the projects have attracted the attention of government Ministers and officials who have sought to encompass a number of the projects within existing policy settings.

In addition, a number of the projects provide solid examples of what success for Māori and Pacific learners looks like through a culturally grounded and strengths-based lens. These models of delivery provide strong examples and research evidence for achieving success for Māori and Pacific learners that reinforce existing policy settings.[24]

As already noted, phase two of the government's *Ka Hikitia* Māori education strategy calls for "local solutions for local change, by local communities."

It identifies two critical factors that will make the biggest difference to Māori students' achievement:

- quality provision, leadership, teaching and learning supported by effective governance
- strong engagement and contribution from parents, families and whānau, hapu, iwi, Māori organisations, communities and business.

The strong achievement of those young people engaged with the MPEI projects provides evidence and endorsement for the second of these two critical factors. Phase 3 (2018–2022) is aiming for "innovative community, iwi and Māori-led models of education provision". The MPEI projects have provided some important models that should be shared.

The *Pasifika Education Plan 2013–2017* calls for "more informed and demanding parents, families and communities supporting and championing their children's learning and achievements." **Mutukaroa** and **Rise UP** are two projects that respond directly to this.

Key messages that could be clearly communicated by Foundation North, on the basis of its experience with the MPEI projects, include the following.

- It is never too late to effect change to lift Māori and Pacific learners' achievement.
- Whānau engagement is key, and Māori and Pacific people know how to do that in their communities.
- Strong cultural identity creates resilient and confident young people, whānau and communities.

One factor to be considered is whether five years is long enough to pilot and evaluate programmes, and to communicate clear evidence of sustained outcomes.

24 For example, Ministry of Education (2008) *Ka Hikitia* and the 2013 Ministry documents, *Ka Hikitia - Accelerating Success 2013–2017: The Māori Education Strategy*, and *Pasifika Education Plan 2013–2017*.

Influencing philanthropy

The criteria of performance for the Māori and Pacific Education Initiative were that:

- ✖ Foundation North is a recognised and respected leader, innovator and influencer of education policy and/or philanthropy.
- ✖ Other philanthropic organisations and/or government(s) recognise the value of the high-engagement approach, and seek to learn from the Foundation.

These criteria have not been fully met. The impact of the initiative is beginning to be shared widely and there is the opportunity to extend the shared learning further. The Foundation is neatly positioned for greater influence with the new Centre for Social Impact (www.centreforsocialimpact.org.nz). It is arguable that achieving the criteria within the five-year timeframe was unrealistic.

There is evidence that the high-engagement funding approach adopted by Foundation North has gained interest among the philanthropic community. The Foundation's Chief Executive has been asked to speak to a number of audiences about the initiative, including the Families Commission, Philanthropy New Zealand and Philanthropy Australia.

The high-engagement funding approach has been gathering momentum in New Zealand and internationally. Foundation North is an early adopter of the model in New Zealand and other philanthropic organisations are interested.

The Catalysts for Change programme and the development of the new Centre for Social Impact position Foundation North to influence philanthropy and government further.

There has been a concerted effort to coordinate communications about the Foundation's role and achievements. Strategic communications will increase the spread of the learning from the initiative and the effectiveness of its impact, and there is a potential role for Trustees in this.

Ongoing learning and refinement of the high-engagement funding approach

The Māori and Pacific Education Initiative meets the performance criteria here, as there is evidence that learnings from implementation of the high-engagement investment approach have been identified and acted upon. There is also evidence of ongoing refinement and improvement of the funding approach.

It was acknowledged from the outset that high-engagement funding was innovative and, given the emergent nature of the outcomes, there was considerable risk attached. Working in such an innovative way required a tolerance of uncertainty and an openness to vulnerability. This meant the Foundation needed to be open to the possibility that some things may not work and a change of direction may be required. A strong, shared understanding of the MPEI vision guided decision-making at difficult times.

One way both the Foundation and those involved with the MPEI projects managed the uncertainty was by embedding a reflective practice of learning and reflection. This meant adopting a "show up and see what happens" attitude, where progress was constantly reviewed and changes occurred mid-step at times. However, it took courage for both parties to stay the course when outcomes and changes took much longer than planned. For instance, the phase of consultation with communities and reference groups took two years. Keeping the end goal in mind allowed everyone to manage the flux and change amidst considerable ambiguity. The decision to fund a developmental evaluation allowed cycles of learning to occur, and the Foundation contracted Frances Hancock (writer, researcher and community development specialist) to conduct interviews with key stakeholders to reflect on the commissioning phase of the project.[25]

Three years into the initiative, the Foundation contributed to a Philanthropy New Zealand publication, *Emerging Practices in Philanthropy*. This contained a series of funders' stories, including two from the Foundation.

Challenges and lessons noted by the Foundation at that stage included:

- ✖ the need to ensure accountability through creating a rigorous and at times difficult application process
- ✖ the importance of culturally appropriate, inclusive processes
- ✖ the time-intensive nature of the high-engagement approach
- ✖ the importance of the right people being chosen as capacity partners.

Learning from the implementation of the first-phase projects was captured in the Foundation's 2012 publication, *He Akoranga He Aratohu: Māori and Pacific Education Initiative lessons to guide innovative and philanthropic and social practice*.[26] It was reflected that a number of lessons were learned that had an impact on the way phase two projects were chosen and also on the application process now being adopted by the Centre for Social Impact.

The process of calling for applications from the community created unrealistic expectations among a large number of applicants, which later caused great disappointment. Letting down a large number of applicant groups created disquiet among Foundation staff and Board members, and it was felt that the process impacted negatively on the Foundation's relationships, particularly with the Pacific community.

To prevent the dashing of expectations, the Foundation changed its process for phase two, utilising its networks to target applications from known community projects. Generally, the phase two projects selected were not start-up organisations but rather projects that were looking to adapt and expand.

25 MPEI contributors & Hancock (2012, 2013)

26 MPEI contributors & Hancock (2012)

The need for high-engagement funding for some of the phase two projects was probably questionable. The projects were being funded to scale-up and leverage their concept and did not necessarily need the additional high-engagement support.

The reference groups were seen as providing strength to the design and selection process. In particular, these groups provided Māori and Pacific leadership within and outside the Foundation. Their contributions brought important skills, knowledge and cultural understandings to the Foundation.

For example, the use of hui and fono has helped improve and support sustained relationships. Importantly, hui and fono have enabled Trustees, providers and evaluators to meet collectively, build connections, share information and clarify issues of importance. More recently, hui have also been used to celebrate important project milestones.

New Zealand's communities are relatively close-knit, and it was unavoidable that perceived and real conflicts of interest would emerge. These had to be closely managed by the Trustees, reference groups and Foundation staff.

After applying, projects that were asked to proceed to the next stage were required to submit a business case. Considerable time and resource was dedicated to these, which presented a challenge for many organisations with scarce resources. This added to the disappointment for the majority who received a letter declining their application.

The Māori and Pacific Education Initiative contributed to a significant shift in the cultural understandings and capability within the Foundation. Trustees and staff now rely on the advice of senior members of the Māori and Pacific communities, both internally and externally, to ensure that engagement with those communities is effective and appropriate. However, the disbanding of the reference groups put considerable pressure on just a few members of staff to ensure the voice of Māori and Pasifika continued to be heard in the various forums. The evaluators understand that the reference groups are being reconstituted to ensure better representation.

For Māori and Pacific communities, relationships are at the centre of how they do business. These relationships must be collaborative and mutually sustaining. The Foundation paid attention to how they engaged with communities and how the relationships built were maintained. The community responded to the high trust and belief placed in them and engaged regularly with the Foundation in open discussions and debates through the duration of the initiative. As a result, groups engaged in a relationship of reciprocity, taking and receiving from each other whilst acknowledging the collective journeys which the Foundation and communities were on.

A key characteristic of relationship development is having the right people in the right place for the right time. From the providers' perspective, the quality of the relationship with the Foundation has been greatly improved by the consistent engagement with the Foundation's Team Leader Māori & Pacific Strategy & Programme. However, as noted above, this put pressure on key people and relationships when key members of staff were unavailable or moved to new positions. That said, ensuring operational staff were adequately resourced and focused only on MPEI has had an enormously positive effect on maintaining the relationships with the providers.

Maintaining a high-engagement relationship did put pressure on projects at times, as they had to find the capacity and capability to meet important milestones and produce data necessary for evaluation purposes. Those projects that had built in research and evaluation were better equipped to meet these obligations.

The Centre for Social Impact now supports selected applicants through a process of readiness assessment, business planning, capacity development, evaluation planning and preparing an investment proposal that will be put to Foundation North for consideration. As the Centre is newly established, the impact and effectiveness of this process has not been evaluated.

Importantly, hui and fono have enabled Trustees, providers and evaluators to meet collectively, build connections, share information and clarify issues of importance. More recently, hui have also been used to celebrate important project milestones.

Economic return on investment

For individual projects, the return on investment was investigated, focusing on the tangible (that is, monetary) value of resources invested and educational outcomes.

Findings for individual projects are included in individual project performance stories. What they suggest collectively is that a positive return on investment is highly likely—that is, the future economic value of improved educational outcomes is likely to significantly exceed the value of resources invested by Foundation North in the Māori and Pacific Education Initiative.

As just one illustration, the OECD has estimated that people who complete high school earn a net public and private return of NZ$135,000 per graduate over their lifetimes, compared to people who do not finish high school. On this basis, the $20 million investment in MPEI would break even if 148 students go on to complete high school who otherwise would not have done so. Furthermore, because the MPEI projects are improving achievement for disadvantaged children, it is closing a larger than average economic gap. In this sense, the OECD figures may underestimate the true return on investment.

For example, in the case of **C-Me Trades At School**, the evaluators compared the starting salaries of graduates to the Pacific median wage, and found that their trades education gave the young people a $270,000 advantage, without taking any subsequent pay rises into account. If Trades At School produces 105 graduates in its first five years (which it is on track to do), the net public and private attributable benefit to the graduates and society is estimated at $29 million, a positive return on investment for the whole initiative from this one project alone.

On the basis of estimated future benefits and current performance, the evaluators concluded that the Māori and Pacific Education Initiative represented excellent value for money from the perspective of the economic return on investment.

IV Conclusions

It was acknowledged from the outset that high-engagement funding was innovative for Foundation North, and there was risk attached to having outcomes only emergent over time. Working in such an innovative way required a tolerance of uncertainty.

The risk appears to have been worth it.

Kevin Prime, former ASB Community Trust Chair, said that his hope was that, sometime in the future, the Trust (now Foundation North) would look back and see many positive outcomes for Māori and Pacific young people.[27] The evaluation findings provide a great deal of reassurance to the Foundation that its investment has already been worthwhile.

Overall, the evaluation finds that the Māori and Pacific Education Initiative has been highly effective. A positive return on the investment made by Foundation North is highly likely—that is, the future economic value of improved educational outcomes is likely to significantly exceed the value of resources invested by the Foundation in the initiative.

In terms of educational academic achievement, many of the projects have been at least as successful, or outperformed, other similar projects.

For the majority of projects, there is evidence of crucial outcomes such as:

- improved student attitudes to learning and life
- increased whānau engagement in education
- improvements in young people's engagement and retention in education.

There is also evidence that some projects have resulted in whānau having higher aspirations for themselves and their children, as well as improvements in family functioning and relationships.

Key elements for success in education that emerged from the projects include the importance of:

- solutions for Māori and Pasifika being community-driven with project sovereignty
- a model, philosophy and way of working that reinforces young people's cultural legitimacy and identity
- the use of a relational approach that builds whānau resilience, safety, knowledge and skills.

The evidence confirms that the projects enhanced and contributed to young people's cultural confidence and identity. In all the projects, relationships and productive partnerships were deliberately and proactively nurtured and valued as significant enablers of the achievement of young people. All the projects also demonstrated a commitment to developing more responsive, creative and rich curriculum and learning experiences, based on the strengths and interests of students and their whānau. The evidence also confirms that the vast majority of projects are achieving outcomes that their families and communities value.

In the words of Foundation North CEO, Jennifer Gill, there was a lot riding on the Māori and Pacific Education Initiative. As the funding for many of the projects draws to a close, it would be fair to say the initiative has been a success.

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Appendix A:
The MPEI projects

- C-Me Mentoring Trust: Trades At School
- He Puna Marama: The Leadership Academy of A Company
- High Tech Youth Network
- Ideal Success: Ngā Huarahi Tika
- Manaiakalani Education Trust
- MITE: Māori into Tertiary Education
- Mutukaroa: Sylvia Park
- Rise UP Trust
- Unitec: Not-for-profit management diploma

C-Me Mentoring Trust: Trades At School

The C-Me Mentoring Trust is an Auckland-based charitable trust that is the driver of the Trades At School programme. The trust was established in 2008 in order to develop a new approach to education that aimed to facilitate and manage successful bridging of students from secondary school into skilled industry employment and higher education through holistic mentoring programmes that include authentic partnerships between tertiary education providers, industry, secondary schools, students, and their families.

Trades At School is a unique programme that operates at the secondary/tertiary interface and beyond. The programme mentors Pacific and Māori youth from Year 11 to Year 13, through tertiary study, and into meaningful employment or further tertiary study.

The programme begins its engagement with youth at secondary school. Learners who are interested in a career in the engineering trades put themselves forward for selection. The selection process includes an assessment and interview process. In 2009, 18 students were enrolled into Year 1 of Trades At School; by 2013 this number had grown to 49.

Those selected for the programme in Year 12 spend one day a week at the Manukau Institute of Technology (MIT) studying for the National Certificate in Mechanical Engineering (Level 2) and the rest of the week completing their NCEA studies at school. The National Certificate in Mechanical Engineering (L2) is a study pathway to 10 apprenticeship options.

During Years 12 and 13, their mentors support the learners connecting with their families, polytechnic tutors, programme managers and relevant school staff. They also run a personal development programme that includes workshops on financial literacy, leadership, drug and alcohol awareness, interview skills, first aid certification and support for completing driver's licencing. Mentors also provide pastoral care support, including supporting learners with any financial, transport or other personal problems that may arise.

> ***"Trades At School made a pathway. It helped me a lot. In school, it helped me get my credits and it helped me get a job. Now I'm an apprentice and I can get a trade."***
>
> *Graduate*

He Puna Marama: The Leadership Academy of A Company

Based in Whangarei, He Puna Marama Trust "seeks to establish a new educational model that will 'brave' the 'expanses of underachievement' in Māori education to produce a new era of elevated Māori success in Te Tai Tokerau."

The inspiration behind their vision and mission is about preparing young Māori to be confident and capable in both worlds, Te Ao Māori and Te Ao Hou.

From the Trust's perspective, The Leadership Academy of A Company is "not a programme it is a way of being in the world".

It draws upon core values of the 28th Māori Battalion. The 28th Māori Battalion, part of the 2nd New Zealand Expeditionary Force during the Second World War, was made of four rifle companies organised along tribal lines. "A Company" men were from the north, many were Ngāpuhi.

> ***"Among our people, their story and legacy is held with reverence... Their mana focuses everyone's attention on what truly matters and invites whanaungatanga, reminding us that we're all connected."***
>
> *Adrian (Telly) Warren, He Puna Marama Trust Chair*

The programme has been developed around three pou (platforms):

- *Be Māori* – By the time a cadet graduates from the Academy he will demonstrate excellence and confidence in all areas "o te ao Māori" so that he may contribute to and benefit from the global world.
- *Be Rangatira* – By the time a cadet graduates from the Academy he will demonstrate the core virtues and character that will enable him to model excellence in his chosen field and lead a new generation of Māori into an ever changing world.
- *Be Educated* – At graduation each cadet will have achieved excellence in their education and continue achieving excellence in whatever pathway they choose.

Each intake is named after a respected member of the 28th Māori Battalion - A Company. Below are the four intakes since 2010:

- 2010 James Henare Intake – 12 Cadets
- 2011 Fred Baker Intake – 11 Cadets
- 2012 William Ben Porter Intake – 12 Cadets
- 2013 Harding Leaf MC Intake – 18 Cadets.

The Academy believes that building resilience and self-confidence is key. This is achieved through the use of military-style training, blended with Mātuaranga Māori (Māori understanding, knowledge and skills).

> ***"Wrapped in a korowai or cloak of unconditional support, the boys come to know that it's up to them to accept responsibility by making the most of the opportunities put before them."***
>
> *Raewyn Tipene, CEO*

High Tech Youth Network

The High Tech Youth Network (HTYN) is a network of studios and people, targeting under-served young people and communities in New Zealand and the Pacific region. Studio 274, in Otara, is located with Kia Aroha College and exists to engage young people in advanced level technology to give them the skills they need for the future and, through their knowledge and experience, to empower their families and the wider community.

The HTYN (formerly the Computer Clubhouse Trust) exists to:

- empower young people and communities to become more capable, creative, and confident life-long learners
- foster the growth of a learning community, through the sharing of ideas and support
- encourage young people in the development of a positive identity and belief in their potential, through linking cultural knowledge and values with technology
- champion, support, manage, research and implement services and projects that will further the above objectives within New Zealand and the Pacific.

The HTYN invests into three integrated interventions:

- community based High Tech Youth Studios together with digital capital (eg, broadband, community Wi-Fi and cloud technology)
- a region-wide (NZ and Pacific) digital and social learning community of connected HTYN studios and their members
- tracking, mentoring and credentialing of HTYN young people aged 8 to 25 through dynamic personal development plans (PDP) that intentionally transition youth from middle school to graduation.

The HTYN believes that to enable social inclusion through technology, it is not enough to simply provide physical and digital resources. For meaningful engagement, investment must be made into digital, social and cultural capital to empower users to take advantage of the tools.

> ***"We've got a world-class community—all we want to do is connect with them."***
>
> *Mike Usmar, CEO*

The intended outcomes are centred on influencing behaviour around adoption and adaptation of new technologies, including family purchasing decisions around technology, internet provision, and then normalising this into the household. Of prime importance is seeing the tangible impact and value that technology brings into the household (family), personal 21st century living, joy of learning, careers and higher learning pathways.

> ***"The value proposition here is, as the network effect increases (driven by an initial small investment into social, cultural and digital capital), then so too does the value of the HTYN macro learning community and localised social and economic benefits around each community High Tech Youth Studio."***
>
> *Mike Usmar, CEO*

Ideal Success: Ngā Huarahi Tika

Ngā Huarahi Tika (the right pathway) is "an innovative Māori education programme", designed and implemented by Ideal Success Charitable Trust, that aims to "enable Māori children to achieve educational success within the korowai of whānau development" (Samantha Lundon, CEO, 2009).

The South Auckland based Ideal Success Trust has a fundamental belief in the power of education to effect positive change. For the first 10 years, the Trust established and ran a training academy that worked with "hard to reach" youth and whānau.

Ngā Huarahi Tika is centred around 10-year-olds who have been identified by local schools as facing challenges. The programme is needs based and staff work with the child and their parents, siblings and whānau, using a strengths-based approach, enabling them to take their chosen right path.

Beginning with a cohort of seven in 2009, by late 2014 the programme was working with four cohorts including 23 young people and 165 of their whānau. The programme offers support through providing tools and options to enable informed choices. Ngā Huarahi Tika works with families to develop learning plans and goals for young people and their whānau, provide literacy and numeracy support, plan and set goals for health and wellbeing, cultural connectedness, finances and strengthening relationships. The staff walk beside the family providing advice and advocacy and ongoing support.

Ngā Huarahi Tika focuses on the Year 6-7 child. This is deliberate, as this age group is in a transitional phase, making key decisions about their fit in their family, community and life. Support is given to the key whānau who surround this child while they are in compulsory education. Parents, siblings, grandparents and other significant family are all part of the programme, in the knowledge that their wellbeing is critical to ensuring their child experiences educational success. Each whānau establish their own goals and aspirations and these are regularly reviewed by nga pou (youth mentors/ whānau support workers).

The involvement that Ideal Success has with whānau may include the provision of a particular service such as providing some financial advice or literacy and numeracy support. Ideal Success also refer whānau to other services, such as housing, health, justice etc. They also support and advocate for whānau when there is a need for coordination with multiple service providers.

Manaiakalani Education Trust

The Manaiakalani Education Programme promotes new teaching and learning approaches across a cluster of decile 1 schools in the low income, predominantly Māori and Pacific communities of Tāmaki. The initial cluster was built up to include 12 schools in East Auckland for pupils from Year 1 to Year 13.

Manaiakalani means "the hook from Heaven", a constellation used for navigation and the hook with which Maui Tikiti a Taranga fished up Te Ika a Maui, the North Island. The Manaiakalani approach aims to "hook" children into learning for life, by building digital citizenship within high-needs communities; providing professional development for teachers; implementing a learn–create–share pedagogy; and focusing on learning through family/whānau engagement.

The Manaiakalani vision is:

> ***"To enable full digital citizenship for Tāmaki students by creating lifelong literate learners who are confident and connected any time, any place, any pace, ready for employment in tomorrow's market, contributing positively to their community."***

Manaiakalani uses netbooks to give young learners access to digital citizenship and the worldwide web, engaging them as they "learn, create and share". Schools first have to gain the support of their board of trustees, then whānau engagement is critical to the success of this programme as all parents must agree to purchase a device for each child, to be paid off over three years.

The programme's technology enablers include the personalised internet-enabled netbook devices, purpose-built software, cloud computing and a wireless network enabling access to learning anywhere, anytime, and at any pace.

The programme works to upskill and support whānau to ensure that parents can confidently engage with their child's learning through the netbooks. A whānau training programme, tailored to meet parents' varied skill levels, has been developed, tested, and implemented across all schools. Parents learn how to access the parent portal in order to view and leave feedback on their children's published work.

Teaching with netbooks is fundamentally different to more traditional teaching approaches, so professional development for teachers is a crucial part of the programme, with a professional learning and development team, digital immersion professional learning groups, websites, toolkits and events to support school staff. There is also university and Ministry of Education research tracking programme outcomes.

Manaiakalani was originally conceived by Tāmaki educators exploring the power of the "new media" to change education paradigms, bring the world to people who could not easily go there themselves, and raise efficacy and outcomes for learners with limited access.

Over time, a Tāmaki schools cluster developed and principals met regularly for support and to share ideas. There are combined meetings of boards of trustees from Manaiakalani schools for decision-making and oversight of the programme. The Manaiakalani Trust was set up to manage the wireless network, technical support and financial systems, and also the partnerships with government and private sector organisations that support the programme.

> ***"Learning has become a lifestyle for our children; it doesn't begin and end with school. The technology is essential; computers are part of our family and in use every day. Manaiakalani is giving our children the tools to keep up."***
>
> *Parent on school board*

MITE: Māori into Tertiary Education

MITE (Māori into Tertiary Education) was established in 2009, originally formed as a multi-partied relationship between Te Wānanga o Aotearoa, Manukau Institute of Technology (MIT), Unitec Institute of Technology and the University of Auckland. Other institutions, such as Auckland University of Technology, Te Wānanga o Awanuiarangi and Massey University, were also involved at a steering group level.

The collaboration aimed to develop and enable a cohesive Auckland-wide strategy for Māori engagement in tertiary education.

> ***"One of the reasons we exist is to provide pathway opportunities for Māori students to go from high school to tertiary education then into jobs, apprenticeships and internships."***
>
> *Project Lead, MITE*

MITE's vision is that:

> ***"All Māori are able to map their own education pathway, and that this leads to them achieving their career aspirations—as educated, informed, valued members of their whānau and communities. That they are helped to learn about themselves as Māori along the way, and they use this to carve their own unique place in this world."***
>
> *Project Lead, MITE*

Initially funded by the Tertiary Education Commission, MITE also gained funding from several tertiary institutions. In 2011, MITE's Pipeline Project was successfully funded by the then ASB Community Trust under the Māori and Pacific Education Initiative.

The Pipeline Project aimed to place tertiary students into employment, internships and graduate programmes, thus supporting positive outcomes for students' education pathways. The dedicated staff did this by recruiting and enrolling Māori students through utilising social media and their networks within the tertiary institutes and linking them to job or internship opportunities. Key to this was providing "tiaki" or support to students to ensure they were job-ready.

MITE staff developed networks with businesses, industries and national corporations where they could be a "go-between" for matching Māori students with trades and professional employment, cadetship, apprenticeship and internship opportunities. Sometimes staff were able to facilitate a more direct link to streamlined opportunities through these contacts such as "meet and greets" and interviews.

The MITE Pipeline Project aims to support the transition of Māori students from tertiary organisations to employers to:

- gain greater employment success for Māori
- cross the "education to employment" divide
- promote the value-add for corporate business to recruit and retain Māori employees
- support Māori business and enterprise to grow and employ Māori students.

> ***"I believe that if you don't have teachers and bosses and society telling you that you can't do something because of your background, you grow up thinking you can do anything. That's the gift I want to give students and graduates here. Being Māori should be a source of pride. There are a unique set of skills that we as Māori can bring to any work place. Reo, tikanga and whakapapa are treasures that set us apart in the corporate world. My advice is to Be Māori and Be Proud!"***
>
> *Louisa Te'i, MITE Pipeline Coordinator*

Mutukaroa: Sylvia Park

Sylvia Park Primary School is a culturally and socially diverse decile 2 school based in Mt Wellington, Auckland. In 2009, Sylvia Park School established Mutukaroa: School and Community Learning Partnership to raise student achievement. This initiative was founded on a strong body of research that indicated that students achieve better when schools and families have a genuine relationship based on learning. When parents are given the resources and knowledge to support their children, their children will achieve. When parents are empowered, they will challenge the school to be more responsive to students' learning needs.

Mutukaroa aims to develop a strong "School and Community Learning Partnership" which:

- empowers children and parents to understand student learning
- supports families to enhance student learning at home
- challenges our school to be increasingly responsive to learning inquiries from parents.

Key elements of the Mutukaroa approach include the following.

- All learners are assessed on school entry at 5 years old then again at 5½ years, 6 and 7 years, with the intention of tracking progress while students/whānau are participating in Mutukaroa and when they exit.
- The School Coordinator invites parents/whānau to a Learning Conversation meeting, of 45 minutes to 1 hour, to discuss their children's assessment data and learning targets. These sessions are longer than a typical parent-teacher interview to allow for an in-depth and focused "learning conversation".
- Sessions take place at a time and location that meets the needs of parents and whānau. For example, locations include a school's parent support centre, cafes, at home, or at the parent's workplace. Translators are used where necessary.
- The School Coordinator uses a learning framework and tool-set to offer parents and whānau structured and specific advice about how to support their child's learning and the meaning and language of the assessment tools. Parents/whānau contribute invaluable knowledge about their child and learn the skills of inquiry so they feel confident to ask their child's teacher constructive questions about their child's learning.
- Parents/whānau receive literacy and numeracy resources to support learning at home and to then bring back to the school for others to use when their child has mastered their current learning targets.
- Using a methodical approach, the School Coordinator establishes 10-week learning targets co-constructed with parents/whānau and teacher. These targets become the basis for the next review session.
- The school follows up with parents/whānau at regular 10-week intervals by phone or face-to-face.
- Parents/whānau are encouraged to drop in to a parent centre, text message or email if they require support.
- Annual targets for educational outcomes are set and monitored as part of the school charter.
- Key assessment tools (eg, Junior Assessment in Maths JAM, Six Year Survey Data, He Matai Matatupu and the School Entry Assessment SEA tool) are discussed and explained.
- The importance of language is recognised. Mutukaroa works with staff or community members who can act as translators. Learning resources have also been translated into a range of Pacific languages and Te Reo.

Rise UP Trust

The Rise UP Trust emerged from a concern that the mainstream education system was not working for many Pacific and Māori children and a conviction that it was time for Pasifika and Māori to generate successful approaches. It also grew from personal experience of how family functioning impacts on children's learning and a deep belief that children's educational success stems from what happens at home and in our communities, as well as our schools.

Rise UP Trust's "Building Learning Communities" project began in 2006, providing programmes designed to engage families in their children's learning. By the end of 2013, Rise UP Trust had worked with around 341 children and 185 whānau across South Auckland, to support them in setting their children up for success in learning at school. Rise UP Trust received funding in 2009 as part of the then ASB Community Trust's Māori and Pasifika Education Initiative, which aimed to develop innovative ways to improve educational achievement for Māori and Pasifika children.

Rise UP Trust began life in a garage, as Auntie Sita's Home School. Today, it is a thriving charitable trust with a strong organisational culture and a group of passionate teachers, committed parents and community leaders who have a shared purpose: to improve education outcomes for Māori and Pasifika and to make the Rise UP vision of Our Best Generation Yet! a reality.

"It is about empowering our children, which means empowering their whānau, their village, to help them discover their 'it'; what their gifts are, how they can nurture them so that their children can be all that they are meant to be ... Rise UP programmes harness inquiry learning and we explain the process as we go so that parents can understand the approach and use it with their children."

Sita Selupe,
Rise UP Chief Executive

Unitec: Not-for-profit management diploma

Unitec's Graduate Diploma in Not-for-Profit Management is a Level 7 qualification aimed at strengthening the management, leadership and organisational capacity and capability of the not-for-profit sector.

For more than 15 years, Unitec Institute of Technology (Unitec) has been an active partner in capacity-building in the not-for-profit (NFP) sector in New Zealand and the Pacific, delivering its highly regarded Graduate Diploma in Not-for-Profit Management through the Department of Community and Health Studies. The diploma offers an interactive and practice-based learning experience and a relevant, values-based curriculum taught by skilled tutors who work in the NFP sector, making it an ideal programme catering to Pacific Island students.

The Foundation North funding (known then as ASB Community Trust) provided scholarships to enable 24 Pacific students currently working in the early childhood sector (in either a management or governance role) to complete the Graduate Diploma in Not-for-Profit Management over a 5-year period.

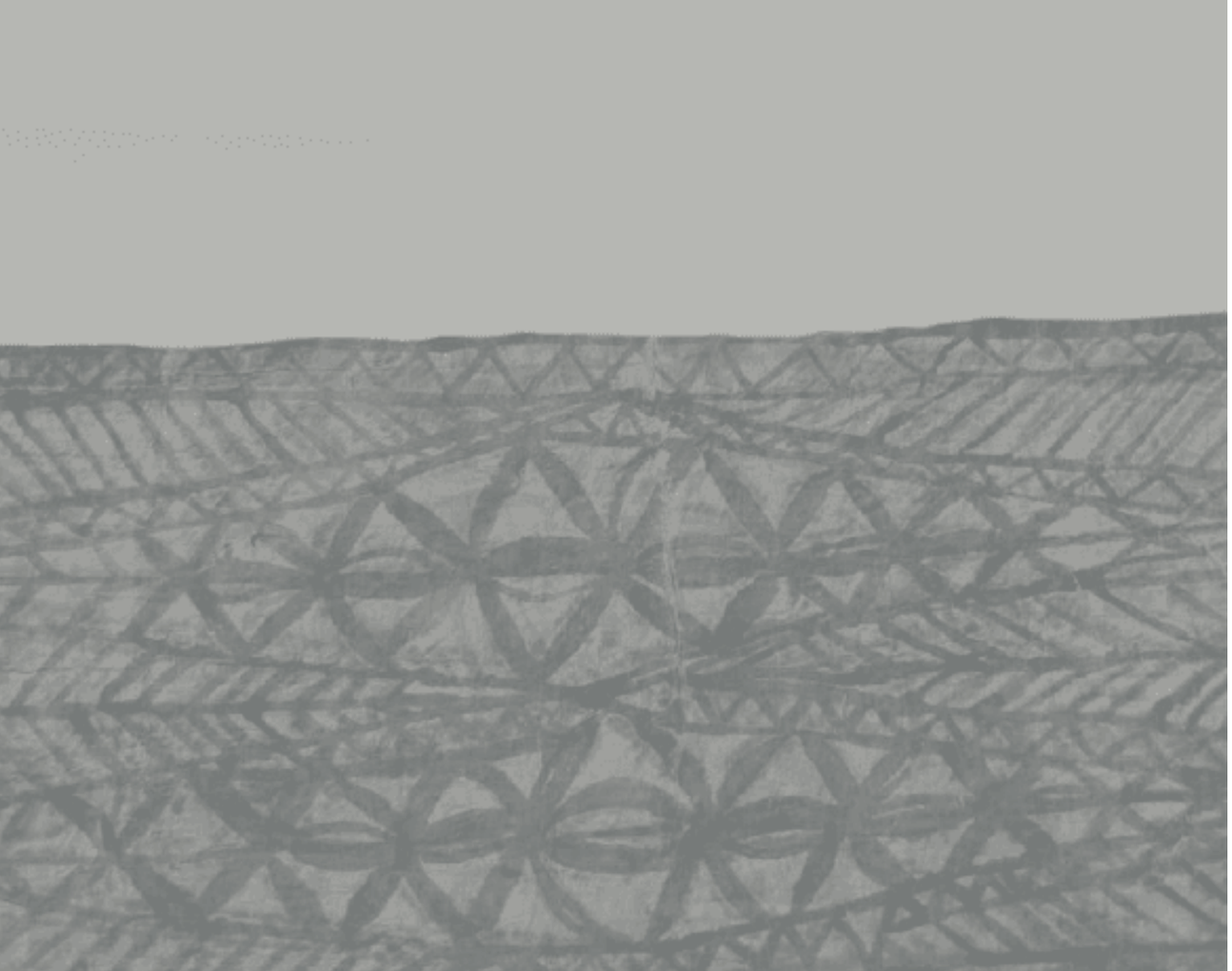
The funding also enabled the provision of individualised pastoral care to support student retention and educational achievement. The pastoral care role provided tailored academic advice, tutorial support and supervision to guide students, build and maintain their confidence, and negotiate extensions or raise issues with tutors. The funding also allowed for networking with Pacific communities to encourage community support for students entering academic training.

Appendix B:

Value for investment methodology

This report addresses the extent to which the grant making through the MPEI has achieved value for the funds invested by Foundation North.

The methodology used in this evaluation integrates economic concepts and methods within an evaluation-specific approach. This appendix sets out the rationale for the approach and methodology used.



What is value for investment?

Value for investment refers to the concept of using resources well. Funding and other resources (such as time, knowledge and skills) are limited. There is an opportunity cost associated with their use. It is therefore desirable to allocate resources to activities that return as much value as possible, and to ensure those resources are used efficiently and effectively.

Evaluation is the systematic determination of the merit, worth or significance of something (Scriven, 2012). An evaluation-specific approach is one which provides robust information about how good something is, whether it is good enough and how it can be improved (Davidson, 2005).

Evaluation of value for investment combines the above concepts. It provides robust information about whether something is valuable enough to justify the resources used.

Despite the fact that all investments have an opportunity cost, the inclusion of economic assessment within evaluation is relatively rare. Arguably, evaluation in general should more often consider the resources used as well as the value of the outcomes they produce (Yates, 2012). The evaluation of the MPEI includes an economic component in recognition of the significant resources invested in the initiative and the need to provide an assessment of whether the investment was worthwhile.

Value is context-dependent

Although many people are familiar with the concept of maximising "bang for the buck" (that is, getting as much value as possible for the dollars spent), measuring this in practice is not as objective an exercise as it may seem.

What is valuable, and what is valued, are matters of context and perspective—and especially so when different cultural backgrounds and worldviews are acknowledged. Some outcomes can be measured objectively (for example, through indicators of academic achievement and other factors), but the value of those outcomes depends on the perspectives taken.

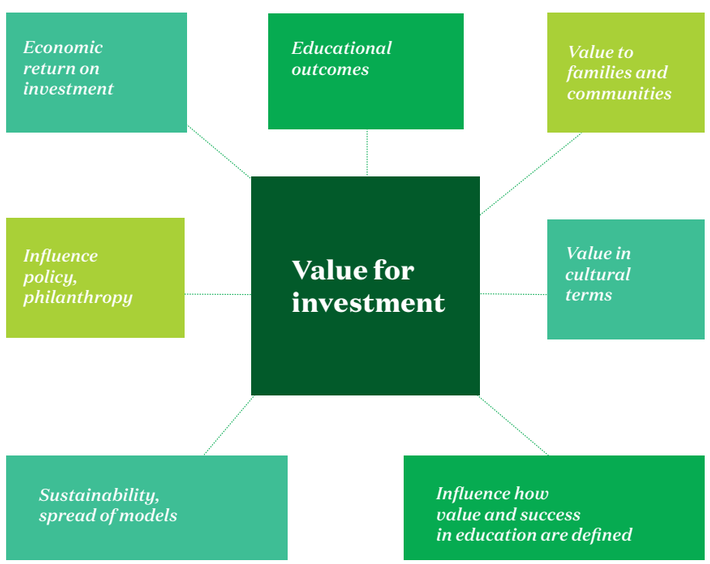
While the benefits of the MPEI can be valued in economic terms—and this can be highly informative—economic frameworks capture only some of the relevant dimensions of what is valuable to Māori and Pacific communities and ultimately to New Zealand. Therefore it was considered important that this study incorporate economic as well as other perspectives.

MPEI projects have the potential to contribute to a broad range of outcomes, some of which have a more obvious economic value than others. For example, education leads to improvements in education and wealth—a clear economic gain for individuals, families and their wider communities.

However, the projects have also contributed to positive outcomes in other areas, such as strengthening cultural identity, home-school partnerships and raised horizons or aspirations. The evaluation has found that outcomes such as these are highly valued and significant to the Māori and Pacific families who have benefited from the MPEI projects, despite the fact that they do not have a direct or obvious economic value. In economic terms, these are known as intangible outcomes. The value of these outcomes needs to be acknowledged and described in ways that are valid and warrantable to Māori and Pacific communities as well as Foundation North.

Therefore, this study uses multiple criteria that were developed in consultation with Foundation North staff and Trustees. These criteria are summarised in the following diagram and detailed in the following paragraphs.

Figure 11: *Multiple criteria used to assess value for investment*



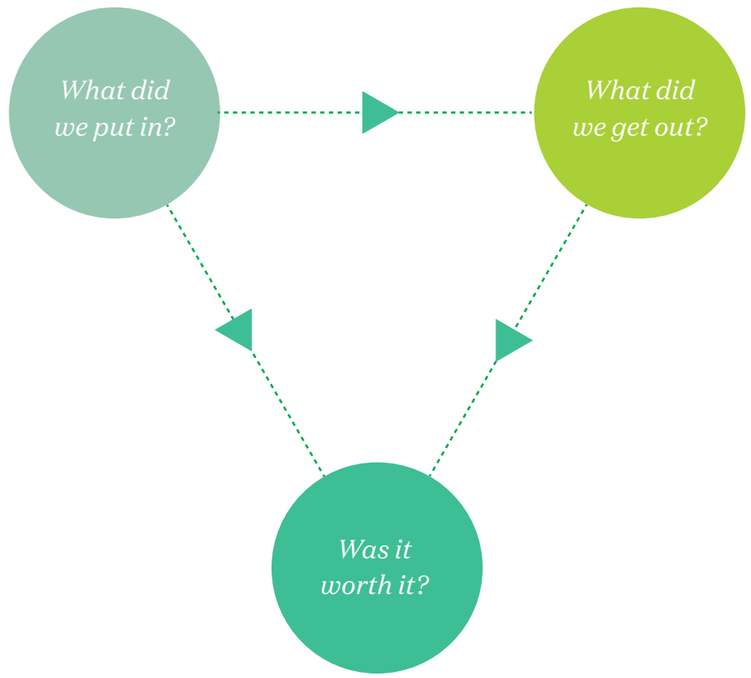
How has value for investment been evaluated for the MPEI?

Irrespective of the method used to evaluate value for investment, the following questions must always be addressed:

- What did we put in?
- What did we get out?
- Was it worth it?

This overarching framework of three questions was used as a way of accounting for the full scope of important and relevant resources used (that is, funding and other essential inputs) and the full scope of important and relevant outcomes achieved—both tangible and intangible.

Figure 12: *Value for investment logic*



Source: King, 2014

Table 3: *Value for investment in MPEI projects*

	What did we invest?	*What did we achieve?*	*Was it worth it?*
Core concept	Resources used and other essential inputs	Outcomes and their value to Māori and Pacific families, communities and the Foundation	Net value added or created—criteria defined in an evaluative rubric combining economic and other valuations of the MPEI projects
Tangibles (examples)	Initiative funding Funding from other sources Value of resources provided in kind (such as office facilities, vehicles)	Increased economic productivity from improved educational outcomes Increased private earnings for those who enjoy improved educational outcomes Improved fiscal impacts associated with those who enjoy improved educational outcomes, such as increased tax take, reduced government spending in other areas (such as Work & Income)	Break-even analysis of financial costs and other benefits from MPEI projects that could be monetised
Intangibles (examples)	A clear vision, and the commitment and drive to pursue it Education-specific knowledge and networks Cultural knowledge and skills to access and engage with Māori and Pacific students, their families and communities Governance and leadership capacity	Improved attitudes Enhanced cultural identity and other culturally valuable outcomes Family engagement in school and learning Students leading their own learning Raised aspirations and goals Improved confidence and outlook Role modelling to others The effect on wellbeing of lifting families from poverty	Value for investment criteria relating to: ✕ educational outcomes ✕ value to families and communities ✕ value in cultural terms ✕ influence on policy and philanthropy ✕ sustainability and spread of models ✕ influence on education policy and how value and success in education are defined

Table 3 illustrates this framework using examples of concepts relevant in MPEI projects.

A performance framework (evaluative rubric) for MPEI

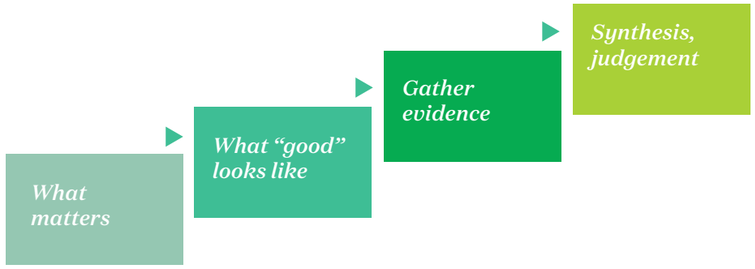
An evaluation-specific approach is designed to produce findings that are valid (supported by robust evidence and analysis), credible (for example, underpinned by appropriate methods) and useful (of practical value to inform future decisions) (Scriven, 2012).

In order to meet these aims, clear criteria are required to provide an explicit basis for determining whether the initiative is worth the resources used.

The following steps were followed:

- Determine what matters—these are our evaluative criteria, for example, educational outcomes, value to families and communities
- Determine what "good" looks like—these are our performance criteria and are collectively set out in an evaluative rubric (**Table 4**), for a range of performance levels
- Gather evidence to address the criteria—this has been a primary focus of the evaluation of the initiative over the past three years
- Consider the evidence collectively (through a synthesis) to reach an overall judgement about the extent to which the initiative represents value for investment.

Figure 13 : *Logic of evaluation*



Source: Fournier, 1995

The following evaluative rubric was developed in consultation with Foundation North staff and Trustees.

Table 4: *Evaluative rubric for MPEI*

Highly effective	ALL of the conditions for *developing effectiveness* are met and, in addition: ✖ The vast majority[28] of projects show educational outcomes[29] at least as positive as those achieved by pre-existing exemplar Māori/Pacific education programmes.[30] ✖ 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.

28 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)

29 Educational outcomes are defined in Table 5.

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

Table 5: *Educational outcomes framework*

In this evaluation,[31] educational outcomes 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.

31 Educational outcome definitions adapted from Wehipeihana et al. (2010) *Evaluation of He Ara Tika*

Evaluation methods: Intangibles

As can be seen in the rubric above, the vast majority of criteria underpinning the value of the initiative are intangible, that is, infeasible or invalid to value in monetary terms.

Multiple evaluation methods were used to address these criteria, including:

- analysis of data on educational outcomes and educational achievement
- interviews with Māori and Pacific students and their families/whānau
- interviews with project leaders and staff
- interviews with other relevant stakeholders in the community
- review of literature on the economic value of educational outcomes
- review of economic and demographic data on relevant features of the New Zealand economy and society
- hui and fono with MPEI providers
- financial data
- administrative data
- milestone reports
- data on other outcomes, such as engagement, family, etc
- evaluation capacity building to help providers tell their own performance story
- narratives from interviews, performance stories, data etc
- photovoice to capture the perspective of youth on what their involvement has meant to them and their families
- review of research findings (for the Mutukaroa and Manaiakalani projects).

Evaluation methods: Tangibles

The return on investment component of the evaluation addresses just one of the evaluative criteria within the rubric:

> *"The overall outcomes achieved through the initiative investment (for example, educational outcomes, associated social and economic benefits, and/or other benefits of value to Foundation North) are commensurate with the overall level of investment."*

Two potential ways in which the outcomes of the MPEI may correspond with the overall level of investment in economic terms, is that they either:

- break even—that is, return an economic benefit of equivalent value to the funds invested; or
- provide a positive return on investment—that is, return an economic benefit greater than the funds invested.

A mix of economic methods was used, with indicators tailored to the specific nature of each project. A summary of relevant economic methods is provided below.

Economic evaluation methods

Economics offers powerful techniques for evaluating value gained from money invested. For example, **cost-benefit analysis** (CBA), one of the most widely used forms of economic evaluation, deals with both costs and outcomes (or benefits) by expressing them in a common unit of measurement, usually dollars. This enables value for money (that is, the relationship between outcomes and inputs) to be expressed in terms of a net present value, benefit–cost ratio or return on investment.

For example, if we spend $100 and get $150 back: [32]

- Net Present Value (NPV) = $50
  (that is, benefits minus costs, $150-$100)
- Benefit Cost Ratio (BCR) = 1.5:1 – or "for every $1 we spend, we get $1.50 back" (that is, benefits divided by costs, $150/$100)
- Return on Investment (ROI) = 50%
  (that is, Net present value divided by costs, [$150-$100] / $100).

Social Return on Investment (SROI) has recently gained attention as an approach to conducting cost–benefit analysis for social programmes (Arvidson et al, 2010). Its strengths include a structured approach and guiding principles for undertaking a cost–benefit analysis in these contexts, and a focus on involving stakeholders and telling the performance story from the perspectives of those delivering and receiving services.

However, both CBA and SROI require an attempt to convert the value of all outcomes into monetary terms in order to make them commensurable with costs (Drummond et al, 2005). In order to reach valid and defensible conclusions, a sound basis is required for making these conversions.

In practice, measurement problems around intangible social outcomes often mean that the range of benefits valued in monetary terms is fairly limited—or, alternatively, assumptions need to be made that represent substantial leaps of faith, resulting in a wide range of plausible results and ambiguous conclusions.

The valuing of intangible outcomes in monetary terms for CBA or SROI may not reflect the value of those outcomes to all key groups in society—and this can exacerbate discrimination by ethnicity, gender and age (Yates, 2012). For example, one set of economic techniques attempts to measure people's willingness to pay for intangible benefits. These techniques require the acceptance of some simplifying assumptions that may skew results and compromise their validity in certain contexts—for example, a low socioeconomic group may reveal a lower willingness to pay than an average socioeconomic group due to their capacity to pay rather than the true importance of the intangible benefit to them.

Furthermore, SROI can be complex and costly to undertake.

32 These simple examples are static—they ignore the dimension of time. In reality, economic evaluation looks at streams of benefits and costs over time (or example, each year) and adjusts their values using a discount rate so that the further a cost or benefit occurs in the future, the lower its adjusted value

This current evaluation utilises core concepts from CBA and SROI—in particular, the use of discounted cashflow analysis methods with return on investment and breakeven point as indicators, and the seven underpinning principles of SROI. [33]

However, the economic component of the evaluation in this instance is limited to tangible outcomes; intangible value is dealt with in other ways as explained above.

Another economic technique is **cost-effectiveness analysis** (CEA). This type of analysis expresses outcomes in natural or physical units (for example, additional years of life, crime-free days, tertiary level diplomas completed). CEA expresses value for money as a cost-effectiveness ratio (such as average cost per additional year of life). Intangible dimensions of outcomes can be reflected by adjusting natural or physical units to reflect their relative utility to people (for example, quality adjusted life years). This is called a cost utility analysis.

Cost-effectiveness and cost-utility methods are often used in evaluating health interventions that have a clear and accurately measurable primary outcome indicator. A full cost-effectiveness study incorporates data for both an intervention and a valid comparator (the next-best alternative intervention) and produces an incremental cost-effectiveness ratio (eg, the additional cost per additional unit gain in outcomes). This approach requires commensurable cost and outcome data for a valid alternative, and a single outcome measure.

Incremental cost-effectiveness analysis is not appropriate for evaluating MPEI projects where outcomes are diverse and multi-faceted. However, where relevant, the case studies include simple cost ratios for individual pilots such as average cost per graduate.

Cost minimisation analysis is another form of economic evaluation. It compares only the net costs of alternative approaches, taking into account any offsetting savings. This approach is typically used in two situations: where the outcomes of alternative approaches are equivalent and therefore cost is the only differentiating factor; or where reduction in costs is the primary outcome of interest. It is plausible that projects funded through the initiative could reduce costs to society or taxpayers—for example, by reducing welfare dependency over the long term—but as this is not the initiative's primary aim, cost minimisation analysis has too narrow a perspective to be used on its own. Nevertheless, cost minimisation concepts have been used in combination with other approaches to illustrate a range of benefits associated with the initiative.

33 Involve stakeholders; understand what changes; value the things that matter; only include what is material; do not over-claim; be transparent; and verify the result

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