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Building Evaluation Expertise in a Government Agency Context in Aotearoa New Zealand

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The Education Review Office is the external education evaluation agency for schools and early childhood education services in Aotearoa New Zealand. Shifts from an accountability to an improvement-oriented evaluation approach have increased the professional expectations of, and knowledge and expertise required by, external evaluators. This article describes the design and development of two frameworks, Capabilities for High Quality Education Evaluation in Aotearoa New Zealand and External Education Evaluation in Aotearoa New Zealand: Principles of Practice for review officers working in a public sector context. The article also explores the early implementation of the frameworks and concludes that an ongoing focus on the professionalisation and primacy of evaluation practice that focuses on what makes the most difference for learners is critical in addressing educational challenges.

Introduction

Internationally there is little research or commentary related to the development and use of evaluation competencies or capabilities for external evaluators working in a public sector context such as the Education Review Office (ERO), the external education evaluation agency in Aotearoa New Zealand. This article describes the process associated with the design and development of two frameworks, *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* (Education Review Office, 2017) and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice* (Education Review Office, 2018) and explores their early implementation and use to build evaluation expertise. In discussing the tensions between a professional and a technical orientation towards evaluation, the article highlights the importance of prioritising the professionalisation and primacy of evaluation practice focused on the learner in ERO's successful contribution to education system improvement.

The development of evaluator competencies and approaches to credentialling evaluators across jurisdictions has increased internationally in the last thirty years. Examples of competency and capability frameworks include: *Evaluator Competencies* (American Evaluation Association, 2018); *Competencies for Canadian Evaluation Practice* (Canadian Evaluation Society, 2018); *Evaluation Standards for Aotearoa New Zealand* (Aotearoa New Zealand Evaluation Association, 2015); *Evaluators' Professional Learning Competency Framework* (Australasian Evaluation Society, 2014); and *Framework of Evaluation Capabilities* (United Kingdom Evaluation Society, 2012). These frameworks of competencies and capabilities are situated in the context of the professionalisation of the field of evaluation. King (2020), who has made a significant contribution to research and development associated with evaluator competencies, highlights their role in moving "the field of evaluation

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thoughtfully towards increased professionalisation and improved practice" (pp. 7-8). In their discussion of essential competencies required to conduct high quality programme evaluations, King and Stevahn (2015), drawing on international cross-comparisons, identified five broad competency domains: professional, technical, situational, planning and management and interpersonal. A comparison of an additional eight sets of international evaluator competencies conducted by the American Evaluation Association Evaluator Competencies Taskforce supported these domains (King & Stevahn, 2020).

The development of competency and capability frameworks has been accompanied by a growing research emphasis on what matters most in terms of the knowledge and expertise required by evaluators to undertake high quality evaluation in a range of contexts, and the implications for capability and capacity building. The development of culturally responsive evaluation approaches has been an important mechanism in increasing the focus on cultural understandings and expertise within and across evaluation competency domains (Acree & Chouinard, 2020; King & Stevahn, 2020). In an evaluation context, Haugen and Chouinard (2019) challenged evaluators to consider who is participating, whose voices are being heard and why. Wehipeihana and McKegg (2018) argued that a recognition of, and response to, the inadequacy of Western knowledge systems and worldviews in evaluative thinking and reasoning in indigenous evaluation contexts, is critical. In addition, recent research has increased understanding of the relative influence and significance of specific competency domains such as situational awareness and interpersonal competence in evaluation practice and effectiveness (Garcia & Stevahn, 2020). Although a key argument for developing competency and capability frameworks is to strengthen practice and increase professionalisation, Schwandt (2017a) reminds us of the limitations of a focus on competencies and credentialling and the associated narrowing of the conception of evaluation as a technical occupation. It is important not to lose sight of "what professionalism means in evaluation, and what the profession itself aims to add to society, or the social good it seeks to serve" (Schwandt, 2017a, p. 546).

Context: Aotearoa New Zealand Education Review Office

The Education Review Office (ERO) was established in 1989 as part of the structural reforms associated with *Tomorrow's Schools* (Department of Education, 1988). Under those reforms the Aotearoa New Zealand education system became one of the most devolved in the world. As the external education evaluation agency, ERO has an important accountability function in the system. Under *Part 5* of the Education and Training Act 2020, *Review of Educational Services*, the Chief Review Officer has the power to administer reviews, either general or relating to particular matters, of the performance of applicable [pre-tertiary] organisations in relation to the applicable services they provide and report on the undertaking and results of such reviews. At system level, ERO carries out national evaluations of education sector performance and policy implementation, and good practice in schools and early childhood education services. The Chief Review Officer may designate any suitably qualified person a review officer (section 465). A designated Review Officer has legal powers of entry and inspection, is entitled to information necessary for the purposes of review, and must be able to provide proof of identity to exercise those powers (Part 6, Subpart 6, section 622).

Tensions in ERO's role and function have been evident since its establishment. As an external evaluation agency, ERO's role includes evaluation for accountability, for improvement and for knowledge generation (Mark et al., 2000). From an evaluation perspective, this range

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of purposes creates a challenge for ERO evaluators in that, in any evaluation context, the tension between functions must be balanced. Shifts in ERO's role and function over time reflect these tensions, as well as a system imperative to increase the influence of evaluation on education improvement and outcomes. Since the government initiated *A Review of the Roles and Responsibilities of the Education Review Office* (Rodger et al., 2000) ERO has increasingly shifted its evaluation approach to an improvement orientation. In response to the review of *Tomorrow's Schools* (Tomorrow's Schools Independent Taskforce, 2019), ERO strengthened its focus on an improvement-oriented approach to external evaluation (Parsons & Higgins, 2022).

The shifts to an improvement orientation highlighted the key role of the ERO evaluator in the success of the approach and the increased complexity of the role (Parsons, 2006; Goodrick, 2022). In an improvement-oriented approach the evaluator requires:

- deep disciplinary knowledge and understanding of education and evaluation;
- cultural understandings, confidence and competence;
- capability to respond flexibly to evaluation contexts and adapt methodological approaches for English-medium and Māori-medium settings;
- expertise in evaluation practice and capability and capacity building;
- organisational expertise that enables the management of the evaluation process across a portfolio of education institutions; and
- the ability to quickly establish and maintain professional relationships that challenge the current state and promote equity and excellence in student outcomes.

Although most new evaluators bring education expertise to the role, knowledge and expertise in evaluation, as well as an understanding of ERO's role in the education system and the legislative and regulatory context in which it operates, is variable.

This background provided the context for the development of the frameworks *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice*. These frameworks articulate the capabilities that ERO evaluators need to undertake high quality education evaluations in diverse contexts and the principles of practice that guide how they do education evaluation. The frameworks are situated in the context of the partnership with Māori established through Te Tiriti o Waitangi (the Treaty of Waitangi), and the Aotearoa New Zealand Public Service, which shape the ERO evaluator role. The frameworks are also a mechanism for evaluation capability and capacity building across the education sector. The remainder of the article traces their design and development and early implementation and use. The design and development and implementation processes were led by the ERO Methodology and Professional Practice Team.

Design and Development Process

The importance of using an evidence-based approach and engaging in a collaborative, participatory process were at the forefront of the design and development process. The design and development of the frameworks, *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice*, were influenced by international developments in the field of evaluation focused on evaluation competencies and professionalisation. Early in the design and development process it was decided to use the term *capability* rather than competency

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because it emphasised the professional agency of the ERO evaluator in developing and demonstrating the capabilities related to the evaluation role, professional practice and personal qualities and dispositions required as a Review Officer in ERO.

The recognition that ERO evaluators needed high levels of education and evaluation knowledge and expertise in the context of the public service strengthened the imperative for the work. The design and development process was situated in the legislative, regulatory, cultural and policy contexts of education and evaluation in the Aotearoa New Zealand Public Sector. Developing the knowledge and expertise needed to function effectively in these contexts as well as what it means to be a Review Officer in a public service agency was considered a critical priority. ERO's *Code of Conduct* (Education Review Office, 2013) was based on the Standards of Integrity and Conduct issued by the State Services Commission under section 57 of the State Sector Act 1988 and reflected: the spirit of public service; ERO's obligations as a government department; and the role and function of ERO as a government department in supporting parliamentary democracy. The design and development process involved four phases as outlined in Table 1.

In Phase 1 the mapping of the strategic context in which ERO evaluators work was undertaken. The key strategic influences on the quality and effectiveness of external education evaluation were identified: government context and legislation; ERO strategic context; strategic leadership; professional pathways; knowledge and expertise; adaptive evaluation practice; evaluation purpose; and evaluation context. The mapping process provided an important overview of the context for external education evaluation in Aotearoa New Zealand and identified significant domains of influence on professional practice. This mapping was accompanied by a discussion paper that highlighted important considerations in developing evaluation capability and capacity in ERO and positioned the Review Officer as an adaptive expert (Timperley, 2013).

These resources were critical in the initial engagement of ERO evaluators in the design and development process. Through regional focus groups evaluators discussed and responded to two key questions: *What are the dimensions of knowledge and expertise required by evaluators in ERO as adaptive experts?* and *What kind of infrastructure would we need to put in place to build organisational capability and support the development of adaptive expertise?* The feedback from the focus groups identified the following dimensions: a deep knowledge of evaluation and education; methodological and evaluation management expertise; responsive, adaptive and ethical practice; enacting a collaborative approach and facilitating participation in the evaluation process; strong interpersonal and relational skills; and cultural knowledge and expertise, particularly in relation to Māori and Pacific. Findings related to the organisational infrastructure required, emphasised a systematic, well-resourced approach to the provision of learning opportunities at different stages of the professional journey.

In Phase 2, systematic reviews of evaluation theory and research, in particular, approaches and dimensions of practice that could influence change and contribute to improvement within the context of ERO's role and function in the education system, were carried out. In the case of *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand*, the systematic analysis of approaches taken and resources in other jurisdictions supported the selection of key domains of knowledge, expertise and dispositions, and the subsequent development of a conceptual framework for the organisation and articulation of capabilities. In the case of *External Education Evaluation in Aotearoa New Zealand: Principles of Practice*, the review of evaluation research and theory contributed to the initial identification of key principles to guide an improvement-oriented external evaluation

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approach. This review also underpinned the development of a tentative theory of external evaluation. The subsequent iterative analysis and synthesis process enabled the development and articulation of dimensions of practice.

Table 1:

Design and Development Process

Phase 1: Initiating the design and development process • Mapping the strategic context and clarifying purpose • Facilitating engagement and participation
Phase 2: Establishing the evidence base • Completing of multiple, systematic reviews of the evaluation research • Desktop analysing of approaches undertaken in different jurisdictions • Identifying what was required in the New Zealand Public Sector context
Phase 3: Developing *Capabilities for High Quality Education Evaluation* • Establishing a national working group including specialist internal expertise • Articulating the excellence horizon for professional performance and development of a visionary portrait of the evaluator as adaptive expert based on the professional adaptive practice of high performing evaluators • Using a sector experts' panel to identify future focused characteristics of the high performing evaluator • Identifying key domains of knowledge, expertise and dispositions and development of an evidence based conceptual framework drawn from the analysis of evidence, resources and feedback from practitioners • Collaborating development of descriptions of practice and content for written resource • Sharing draft design and development work with ERO evaluators, provision of opportunity to provide initial feedback and further refinement • Formal consulting process accompanied by survey focused on use and usefulness • Final editing and publishing
Phase 4: Developing *Principles of Practice* • Establishing a national working group including specialist internal expertise • Reviewing evaluation research and theory • Initial developing and articulating of key principles to guide an improvement-oriented external evaluation approach • Developing of a tentative theory of external evaluation • Iterative analysing and synthesising process to develop and articulate dimensions of practice • Initiating the organisational feedback process led by members of national working group • Final editing and publishing

In Phases 3 and 4 the development of both *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New*

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Zealand: Principles of Practice involved a collaborative, participatory process over two years. In each case a national working group including specialist internal expertise provided leadership and facilitation of the design and development process. The process of developing the capabilities involved the working group in a series of workshops, to envision and articulate the excellence horizon for professional performance in ERO and make tacit knowledge and expertise explicit and visible. The group reviewed national and international competency frameworks and competencies; developed a visionary portrait of the ERO evaluator as adaptive expert informed by the practice of high performing professional evaluators; and established a panel of principals and School Trustees to explore sector leaders' expectations related to the characteristics of a high performing evaluator. The working group used a collaborative, iterative process to identify and refine key groupings of knowledge, expertise and dispositions required for professional, adaptive evaluation practice. The development of the draft conceptual framework and descriptions of practice and content for the draft publication was then undertaken. In developing the principles of practice a similar collaborative process was used to identify and refine the key principles of external evaluation practice that would promote education improvement and articulate a theory of action.

Working group participants coordinated regional participation and feedback opportunities. ERO evaluators participated in the development process through regionally based workshops. Feedback through this process was used in the further refinement of draft documents. In addition, systematic feedback was gathered through survey and analysed prior to the final editing and publication of *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice*.

The Frameworks

The design and development process associated with *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice* reinforced the importance of context specific capabilities and practice frameworks in building capability and capacity in external education evaluation in ERO. The process also provided a valuable opportunity to engage ERO evaluators in designing and developing appropriate learning and support mechanisms.

Capabilities for High Quality Education Evaluation in Aotearoa New Zealand articulates what ERO evaluators need to know and be able to do (the knowledge, expertise and dispositions) to undertake and deliver high quality evaluations in the diverse education contexts of Aotearoa New Zealand. The capabilities framework (see Figure 1) consists of seven domains: the role of the public servant; education and evaluation knowledge and theory; leadership and teamwork; evaluation practice; contextual and cultural understanding and responsiveness; interpersonal and communication skills; and personal qualities and dispositions.

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(Education Review Office, 2017, p. 1)

Figure 1. Capabilities for High Quality Education Evaluation

The framework shows the importance of considering the overlap of evaluation-specific and content-specific knowledge, skills and dispositions in particular evaluation contexts, highlighted by King and Stevahn (2015). This consideration emerged as significant for external education evaluation in Aotearoa New Zealand. ERO evaluators are drawn primarily from education contexts, reflecting the focus of ERO's work and the need for education knowledge and expertise and professional credibility in the external evaluation approach. The development of evaluation-specific knowledge and expertise in the context of ERO's role and purpose is a key focus. The appendix in the *Capabilities for High Quality Education Evaluation* outlines specific areas related to developing evaluation knowledge and skills and expands the capabilities associated with the domain *Education and evaluation knowledge and theory*. The need to articulate the personal qualities and dispositions that enable high quality evaluation was identified early in the development process. The domain contextual and cultural understanding and responsiveness is also important in the Aotearoa New Zealand context. External evaluations are carried out in both Māori-medium and English-medium contexts. ERO's evaluation methodologies are culturally and contextually specific and draw on Kaupapa Māori (Cram et al., 2015) and Western epistemologies. The capabilities framework articulates the aspiration that ERO evaluators will undertake high quality evaluations that are responsive to culture and context in terms of: *cultures, languages and identities; te ao Māori and tikanga Māori; and bicultural and multicultural contexts* and *use te reo Māori with increasing expertise and confidence.*

External Education Evaluation in Aotearoa New Zealand: Principles of Practice (Education Review Office, 2018a) complements the capabilities framework. *Principles of Practice* (see Figure 2) articulates eight principles to guide the practice of external evaluation: a focus on the learner; promoting external accountability and strengthening internal accountability; a culturally and contextually responsive approach; the integration of internal

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and external evaluation; technical rigour; a participatory process; promoting evaluation use; and developing evaluation capacity.

(Education Review Office, 2021, p.5)

Figure 2. Principles of Practice

These principles are situated in a commitment to honouring Te Tiriti o Waitangi. Each principle is framed by an introduction that draws on evaluation theory and research, explaining why this principle is important in the context of external evaluation and providing links to important evaluation references. The principles work together in a coherent way to support and promote education improvement through external evaluation. As the key principles of practice that characterise an improvement-oriented external evaluation approach were identified, the theory of action (Education Review Office, 2018a, p. 6) was developed. The unpacking of each principle in terms of "we will" statements was influenced by the approach used in the Scottish inspection context (HM Inspectorate of Education, 2011). The approach promoted precision in the definition and description of the evaluation activities that would enable the enactment of the principles in practice in the context of ERO's role and purpose. *Principles of Practice* also articulated the ethical considerations that are important for ERO evaluators: "In carrying out evaluations ERO evaluators are required to be fair, impartial, responsible and trustworthy" (Education Review Office, 2018, p. 20). Following a revision of *External Education Evaluation in Aotearoa New Zealand: Principles of Practice* in 2021 to include early childhood services, *Principles of Practice: Education Evaluation for Improvement in Schools and Early Childhood Services* (Education Review Office, 2021) was published.

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Implementation and Use of the Frameworks

The initial implementation and use *of Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice* within ERO was critical in developing the organisational infrastructure, identifying critical domains for focus at different stages of the professional pathway and strengthening the provision of, and access to, responsive professional learning opportunities.

Developing organisational foundations

From an ERO organisational perspective, the capabilities and principles of practice frameworks provided the foundation for the further development of the organisational infrastructure to support a systematic approach to capability building. ERO developed a deliberate and sustained approach to the induction of new evaluators based on the frameworks. A key aim of the induction guidelines was to respond to the call from managers and inductees to define the capabilities expected at key points of evaluators' learning journeys. The induction programme provided ongoing, flexible and planned support tailored to the needs of each inductee. The two key phases of the programme, the beginning evaluator and developing evaluator, included professional practice expectations for each phase and associated checkpoints. The implementation of the induction professional practice guidelines (Education Review Office, 2018b) highlighted the nature of the professional learning opportunities required to support professional learning and development and the importance of access to coaching expertise in the context of practice.

Focusing on what matters most

The use of the capabilities and principles of practice sharpened the focus on what was most important in building ERO evaluator knowledge and expertise. In the Aotearoa New Zealand context, ERO's dual accountability and improvement role in the education system shaped the demands and expectations associated with the evaluator role. Although most new evaluators were drawn from an education background, a significant investment in building evaluation knowledge and expertise was required, particularly in relation to the capabilities associated with professional practice and systematic inquiry (Galport & Azzam, 2017). Because of the focus of ERO's external education evaluation role on the quality and effectiveness of education provision in schools and early childhood education services, site visits were integral to the evaluation methodology. The relevance of site-visit standards, proposed by Patton (2017) such as: evaluation competence; methodological competence; interpersonal competence; cultural competence; planning and preparation; site participation; do no harm; credible fieldwork; neutrality; debriefing and feedback; site review; and follow-up; were evident in the process of learning to practice evaluation in diverse education contexts. Chouinard et al. (2017) in their study of student evaluators engaging in fieldwork highlighted the dynamic and complex nature of this process. Learning to navigate the rough ground of practice (Schwandt, 2003) and ultimately ensuring that the setting was enriched through the conduct of the evaluation (Patton, 2017) was, and continues to be, a critical challenge for new ERO evaluators.

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Providing responsive professional learning opportunities

The identification of key areas of focus for building external evaluation expertise shaped the provision of responsive professional learning opportunities across the professional pathway. New ERO evaluators had access to courses focused on evaluation fundamentals. Workshops related to the theory and practice of evaluation, including qualitative evaluation approaches, and the education research evidence linked to outcomes, were provided. An internal coaching programme was implemented. The aims of the programme were to: strengthen the effectiveness of leadership; support implementation of new approaches to evaluation and ongoing improvement in the quality and consistency of professional practice; support the evaluation practice of new review officers; develop agency and accountability for high standards of work; and build internal capacity for continuous improvement. The capabilities and principles of practice provided the focus for coaching through drawing on the professional knowledge and strengths of managers who had knowledge and expertise related to ERO's professional education evaluation practices. Access to specialist professional learning was provided through advanced qualifications in evaluation at the University of Melbourne.

The situation of the frameworks within the context of the partnership with Māori established through Te Tiriti o Waitangi, drove the development of an internal bicultural competency programme. Extensive provision was also made for professional learning opportunities related to learning te reo Māori through a variety of online programmes and wānanga (a place of higher learning). The recent Public Service Census found high levels of staff confidence in relation to support for learning and using tikanga Māori and te reo Māori in ERO (Te Kawa Mataaho Public Service Commission, 2025).

Tensions between a technical and a professional orientation

During the process of implementing and using *Capabilities for High Quality Education Evaluation in Aotearoa New Zealand* and *External Education Evaluation in Aotearoa New Zealand: Principles of Practice* across ERO, tensions between a technical and a professional orientation became evident (Schwandt, 2015). ERO's role and function in the education system created organisational demands associated with the management, scheduling and staffing of evaluations in schools and early childhood education services. The size of a school or service and the type of evaluation activity being undertaken determined the resourcing allocated. Achieving a balance in terms of "doing" an evaluation following standard procedures using a range of guides, tools and techniques for data collection and reporting, and developing the capability to engage in evaluative thinking and make evaluative judgements about education quality and effectiveness in ways that influence decision-making about actions for improvement was an ongoing challenge. Haynes and Johnson (2017) identified that the opportunity for evaluators to work collaboratively in teams or pairs on site and collectively reflect on the strengths, weaknesses and opportunities for future improvement both increased shared learning and built confidence. Working in a team of ERO evaluators who demonstrated adaptive expertise, supported by expert coaching, provided powerful learning opportunities for new evaluators.

Concluding Thoughts

ERO's development of capabilities and principles of practice were intended to promote the professionalisation of evaluation thinking and practice; high standards and consistency in

professional evaluation practice; internal and external quality assurance; and the credibility and integrity of external evaluations. Chouinard (2013) reminds us that in the public sector context, evaluation can both legitimate and respond to the system of performance management and accountability, and/or act as a mechanism for broadening democracy. There are significant challenges for ERO, and ERO evaluators, in managing the inherent tensions in the agency's role and function in the education system (Parsons & Higgins, 2022). Furthermore, these tensions can be exacerbated by changes in the political and funding priorities of the government of the day. From an education perspective, the critical challenge for the Aotearoa New Zealand system remains addressing the trajectory of decline and improving equity and excellence of education outcomes, particularly for Māori and Pacific learners. In a recent working paper focused on improving quality and equity, the Organisation for Economic Co-operation and Development identified key factors contributing to the system performing below its potential and the consequent decline in achievement and variability in outcomes. The review also highlighted the role of ERO in improving system performance through spreading best practice (Haugh et al., 2024).

Darling-Hammond (2024) argues that education systems must be reinvented to achieve equity, and education environments, designed for an equitable whole-child approach. ERO's whakatauki (traditional Māori proverb) *Ko te tamaiti te putake o te kaupapa/The child is the heart of the matter* provides the strategic imperative for ERO in responding to the challenges faced by the Aotearoa New Zealand education system. ERO evaluators play a key role in the agency's role and function in the education system and in bringing the whakatauki to life. Schwandt (2017b) argues that from an evaluation perspective, the critical challenge is to ensure each evaluation focuses on the primacy of practice, rather than evaluation methods, tools or approaches. He suggests that the central question for ERO's external evaluations could be framed as: "What should we do for these children, at this particular moment and in this location?" (p. 17). The evaluator must recognise the interdependency of the evaluator and participants; establish the conditions that enable dialogue; and guide evaluative thinking as a collective sensemaking exercise. Evaluative judgement becomes "a situated, contextualised practice-based form of reasoning that differs from the application of evaluation tools in means-end reasoning" (p. 20). ERO's capabilities and principles of practice frameworks were designed to support evaluators working in a public sector context to enact such an approach in schools and early childhood services. However, the success and influence of the frameworks, as well as ERO's improvement-oriented evaluation methodologies, will depend on an unrelenting focus on education practice that is based on the evidence about what makes the most difference for learners and their learning and a sustained commitment to building evaluation capability "as a professional practice committed to promoting the public good" (Schwandt, 2015, p. 148) across the education system.

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