Making Relationships Count

Exploring how Caritas Aotearoa New Zealand can use monitoring and evaluation to develop trust-based relationships with *tangata whenua* partners.

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ABSTRACT

A culture of monitoring and evaluation (M&E) is now widespread in the development sector. Organisations are expected to measure progress and monitor results in order to determine the impact of their interventions. Yet despite relationships being central to effective development, there are very few frameworks or indicators to help measure the quality of trust – as the foundation of relationships. This research investigates ways to measure trust-based relationships. Drawing on a case study of Caritas Aotearoa New Zealand (Caritas), along with an extensive literature review, this report explores how Caritas can use M&E to reflect trust-based relationships with *tangata whenua* partners. Perspectives on M&E and specifically measuring trust, are explored from an Indigenous and Māori world view. Semi-structured interviews with five people representing Caritas and two of its Māori partners disclose behaviours that deepen trust. Through this exploration, an ongoing conversation about culturally competent M&E and the centrality of trust-based relationships in expanding evaluation practice is revealed. The insights expressed are presented as ten indicators of trust. Together with a foundational layer relying on cultural competence and shared vision, these indicators form a framework with trust at the centre. The ten signs of trust are; face to face, going beyond the minimally required, challenging and questioning, understanding time, interacting in the marae setting, interacting in the in-between spaces, listening genuinely, committing as an organisation, contributing funds and contributing new knowledge and connections.

This report concludes that building strong, trusting relationships matters. They do count in order to achieve development that enables shared learning, empowerment and self determination. Cross cultural collaboration will be more meaningful when behaviours that impact on trust are identified and regularly monitored. The emergent framework can be a practical tool for Caritas to use in monitoring and evaluating trust with its *tangata whenua* partners. It presents an opportunity to explore and reflect on dimensions of trust from a *tangata whenua* perspective, opens up the space for more dialogue with partners and invites a more collaborative approach towards doing development.

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

LIST OF FIGURES AND TABLES

GLOSSARY OF MĀORI TERMS

he wā	'a' time
he wā , he wāhi	time and space
Hui	public forum
Hui ā tau	annual conference
hongi	kiss
iwi	Māori tribe
kai	food
kanohi ki te kanohi	face to face
Kaihāpai Māori	Māori liaison role in an organisation
kaupapa	knowledge
kaupapa Māori	Māori knowledge
kia ora	hello, greetings
koha	gift, donation
kōrero	talk
marae	meeting place
manaakitanga Māori	hospitality, kindness, generosity
manuhiri	visitors
paepae	visitors speech on the marae
pepeha	another formal welcome on the marae - the way to introduce yourself in Māori
Pākehā	person of European descent

papa tākaro	playground
pōwhiri	formal welcome ceremony
tangata whenua	people of a specific land, belonging to a specific location and people and with a history and context also specific to them
te reo	Māori language
te wā	'the' time (can be used for a specific time)
tikanga	customs
waiata	song
whaikōrero	formal speeches made by men during powhiri and in social gatherings
wharenui	meeting house
whakawhanaungatanga	the process of establishing relationships relating well to each other

1. INTRODUCTION

"Nothing ever exists entirely alone. Everything is in relation to everything else."
Buddha

1.1 INTRODUCTION

Doing development that matters, that brings about positive societal change, is the driving force for many development practitioners. Consequently, organisations are expected to measure progress and monitor results in order to answer the question: "So what difference does our intervention make?" (United Nations Development Programme, 2009, p. i). A culture of evaluation must be embraced. Yet, despite relationships being central to effective development (Chambers, 1997; Mohan, 2002), processes for measuring trust in relationships are not widely considered in the international development literature. While it is agreed that partnerships, participation, dialogue and shared learning are all important aspects of monitoring and evaluation (Engel, Carlson, & van Zee, 2003), measuring the quality and character of trust itself – as a foundation of relationships – is not a focus. Therefore, this research project explores effective ways to measure trust-based relationships.

1.2 RATIONALE

Specifically, this is a study for Caritas Aotearoa New Zealand (Caritas). This Catholic social justice agency in New Zealand has been working with several *tangata whenua* (local Māori) communities in New Zealand for some years and most of this work has been spent establishing effective, trusting relationships with them. For Caritas, this feels like an authentic and meaningful starting point (Caritas, 2016b). Connecting is about establishing good relationships and Caritas now wants to understand how the process of monitoring and evaluation (M&E) can reflect the relationships it has built and help improve them.

While there is an understanding in the organisation that trust is central to t*angata whenua* relationships, there is no obvious framework Caritas can use to measure trust and therefore see how effective it is in deepening trust. This is a process Caritas is keen to explore and believes needs to be done together with its *tangata whenua* partners.

Caritas sees the value in this collaborative process on many levels. First, to support evolving and deepening self-awareness, second to reflect on the balance of power in the relationships and, third, to gain the trust of the communities by recognising that Maori may do it differently and better insights may be achieved if everyone does it differently (Wehipeihana & Grootveld, 2016).

1.3 RESEARCH AIM AND QUESTIONS

Research aim	To explore how Caritas Aotearoa can use monitoring and evaluation to develop trust-based relationships with *tangata whenua* partners.
Research question	How can monitoring and evaluation be done in ways that reflect trust –based relationships with *tangata whenua* partners?
Research sub question	How do Caritas and the *tangata whenua* partners define trust in terms of their relationship to each other?

1.4 OVERVIEW OF THE RESEARCH REPORT

This chapter begins with an introduction to my study and outlines the rationale for my research topic. It explains the research aim and questions and my motivation to pursue this case study. A context for the study is provided to situate my standpoint for evaluating trust and I provide a background to the organisations featured in the study.

Chapter Two provides a review of the literature related to Indigenous perspectives on monitoring and evaluation. In particular, perspectives on trust-based relationships are explored from a Māori worldview. Through this investigation, I discover an ongoing conversation about culturally competent monitoring and evaluation, the centrality of trust to relationships and the role of relationships in expanding evaluation practice.

In Chapter Three I outline the methodology used in conducting this research. I reflect on my own positionality vis-a-vis the research and the key ethical issues that

were considered in this cross-cultural environment. I detail what data was collected within the qualitative approach and I introduce the organisations and participants selected for interviews. Finally in this chapter, I discuss limitations to my research.

Chapter Four begins with a data analysis and then presents the findings of the interviews, which have been validated by a document analysis and participant observation.

Chapter Five concludes the report with a framework for reflecting trust. In this chapter, I discuss the findings as they relate to the literature as well as consider new themes that have emerged. Finally, I put forward some recommendations for how Caritas can use the framework to measure and monitor trust as part of an M&E process with *tangata whenua* partners.

1.5 MOTIVATION OF THE RESEARCHER

This research draws on a range of my own work and personal experiences. For twenty years I have worked in the field of corporate marketing and communications where building brands means building trust with customers. From this environment comes my deep awareness that where there is no trust, there is no connection. Further, there is no impetus into our next level of engagement. I wanted to pursue the idea further within this development studies research topic.

My motivation to work with Caritas comes from getting know the organisation through volunteer experience. I have been moved by the courage shown by certain staff to boldly question the way they work with *tangata whenua* and whether they can improve. It is serendipitous that Caritas has an ongoing relationship with the Taranaki community of Parihaka and chose this community to be one of the *tangata whenua* in my study. I was born under Mt Taranaki and have always been moved by the powerful legacy of this small but strong Māori community. I am privileged that this study has given me the opportunity to visit and interact with people from Parihaka and deepen my understanding of their lived experiences.

My motivation to produce a useful and interesting report is also mixed with a healthy dose of anxiety. I have a level of personal discomfort that I have not felt previously due to working in unfamiliar territory. I am anxious about my lack of

competence in the Māori world. Nevertheless, appreciating this knowledge of my own positionality and cultural differences is a good starting point for this cross-cultural project.

1.6 BACKGROUND

In Chapter Three I explain how I came to work with Caritas, the emergence of this case study and how the partners chosen for this study were selected. Here, I background the history of the Caritas connection with the selected *tangata whenua* partners.

In the Caritas Strategic Plan 2013-2017, "Indigenous peoples" is specifically included as a "Strategic priority area" (Caritas, 2016c). This commitment to Māori was included in the Caritas strategy following a letter from the New Zealand Bishops in 2012 imploring the organisation to recognise "that it is essential that Catholic Māori feel Caritas is their organisation" (Dunn, 2012, p. 10). Five Māori communities were selected based on where Caritas already had existing historical connections and where issues of injustice were being experienced. These were Parihaka, Taranaki; Motuti, Northland; Kaikōura, Canterbury; Hiruharama, Whanganui and Te Roopu Haurongo in Bay of Plenty.

The relationship with Parihaka was forged in 2009 with a discussion about the need for a resource for schools and parishes that Caritas could produce. Care was taken to consult with Parihaka over what this resource would look like and after consideration and planning, a booklet was completed called *Remembering Parihaka* (Caritas, 2012). This collaborative result ensured the small Taranaki community was happy to continue a relationship with Caritas, despite a very small amount of funds being offered.[1]

Te Rūnanga o Te Hāhi Katorika (*Te Rūnanga*) is the New Zealand Catholic Māori Council. It provides the expertise on *te reo* in a Catholic context. *Te Rūnanga's* relationship with Caritas has a long history and like Parihaka, it has evolved beyond a programme-specific connection. In fact, there is no funding in the programmes

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[1] In the Criteria for the Caritas Tangata Whenua Fund (Caritas, 2016b), $5000 per *tangata whenua* partner is available.

budget to support *Te Rūnanga* but Caritas funds their capacity to attend conferences and offers generous *koha* for advice and work produced.

1.7 FRAMING THE STUDY THROUGH A POST COLONIAL AND POST DEVELOPMENT LENS

The theories of post colonialism and post development have helped to conceptually frame my study. These broad schools of thought both challenge the very meaning of development as rooted in colonial discourse (Escobar, 1997; McEwan, 2008). They critique this discursive legacy that positions a dominant Western world view against a backward 'Third World'. Seeking to disrupt these views, both theories reframe the world through an alternative perspective that insists "the 'other' world is in here" (McEwan, 2008, p. 125). They call for understanding that this "other" world is integral to modernity and progress. Both theories share a radical edge, seeking out diverse voices in their attempt to recover the agency and resistance of people subjugated by colonialism (Rahnema, 1997).

In the face of criticism for being too pessimistic and anti-modernist about the role of development (Rist, 2008; Ziai, 2004), emergent post-development scholars have begun exploring a new critical perspective with more attention to local politics of change. This hopeful post-development debate offers a more constructive and practical approach. It is richer because it looks to reimagine agency and place through a local, ethical and cultural lens. It recognises politics in place as a necessary starting point and engages with the messiness, contingencies and complexities inherent in development projects. (McGregor, 2009; McKinnon, 2007; Rist, 2008).

Post development thinkers such as Gibson-Graham have inspired the debate by looking at what a community has, rather than what it lacks in terms of people, associations, customs and infrastructure. Their work has been powerful in revealing hidden assets beneath the surface in most local communities. Previously invisible, diverse economies of community capacity are brought to light and perceived as strengths (Gibson-Graham, 2005).

Underhill-Sem and Lewis (2008) in their study with a Māori iwi in New Zealand applied Gibson-Graham's diverse economies theory (Gibson-Graham, 2014) to highlight the capacities of the community that bring resilience and wellbeing. Their

consultation and inclusive *kaupapa Māori* practices brought insights about the strengths of the community. For example, *kōrero*, (talking itself), discussing what a new future could look like, the *taongas* (cultural treasures) as community strengths and actual relationships with government agencies (Underhill-Sem & Lewis, 2008, pp. 312-313).

Similarly, Fitzherbert & Lewis (2010) in their study with a Māori community in Northland, New Zealand, revealed a community view on development that was not linear nor focused on progress at any cost. Rather it involved "mobilising positive energies and narratives, commitment to community being and taking ownership of everyday problems and achievements" (2010, p. 149).

These examples illustrate how a post-development focus can enable new forms of practice and open alternative pathways into the future. I believe through this lens, I can critically approach my study in a holistic way, seeking out the political and cultural aspects of local community with a humility that might help frame evaluations more meaningfully. I will be searching for answers to the questions: "Whose story, whose place, whose benefit, and whose right to speak and in what ways?" (Fitzherbert & Lewis, 2010, p. 139).

1.8 SUMMARY

I believe my study with Caritas and two of its *tangata whenua* partners contributes to an area where there is limited research. It is an opportunity to explore what trust-based relationships look like by defining some critical behaviours of trust. I am mindful that throughout this research, I will need a willingness to understand complex power relations. Post development thinkers along with participatory monitoring and evaluation (PM&E) scholars similarly reinforce that the development *context*, in its messy, dynamic, reflexive and cross-cultural way, is critical (Curry, 2003; Guijt, 2010). Yet, I am aware that much of the development practice is still an industry that prefers to reframe development into fixable, technical problems. It embraces a culture of evaluation to measure progress and achieve results. Relying on the political complexities and innovative ways of diverse communities, is not something it does especially well (Gibson-Graham, 2006). Ultimately, I hope to contribute to improving Caritas' understanding of how it can use M&E to measure and monitor trust in order to deepen relationships with *tangata whenua* partners.

2. LITERATURE REVIEW

He waka eke noa[2]

2.1 INTRODUCTION

This review interrogates the literature on monitoring and evaluation and is guided by the following questions that align with my research questions:

- What are Indigenous perspectives on monitoring and evaluation (M&E) and specifically on relationships and trust?
- How can M&E be done in ways that reflect trust–based relationships with Indigenous partners?
- What frameworks or indicators exist for monitoring and evaluating trust–based relationships?

My focus moves beyond the research on mainstream and participatory approaches to monitoring and evaluation and explores Indigenous views on evaluation and measuring trust-based relationships. In particular, I explore critical multi-dimensional concepts and consider whether establishing trust-based relationships at the outset, leads to improved sharing of learning outcomes in a cross-cultural context. The literature review draws from a selection of sources including journal articles, books, conference presentations and conversations with evaluation practitioners. It is separated into two parts. In the first part, I examine Indigenous perspectives on M&E, looking for insights about relationships and trust. In the second part, I review how Indigenous measures of well-being, including trust, are being reflected in evaluation practice.

2.2 INDIGENOUS PERSPECTIVES ON MONITORING AND EVALUATION

Since the turn of the millennium, Indigenous thinking has kept challenging M&E to be more sensitive to context, interpersonal and cross-cultural relations. The question as Smith (1999, p. 69) poses it, is; "what alternative ways of knowing and living do we need to be mindful of?" In this section I examine the literature that sees the world through different eyes and outline three common themes that

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[2] Maori Proverb; translated as "We are all in this together"

emerge in the call for improved ways to practise M&E. First, that understanding context is critical, second that the process itself needs to be embraced and third, that increased cultural competence can serve as a foundation for effective evaluation.

First, sensitivity to the development context and to the local beneficiaries for whom the development takes place is widely covered in the participatory M&E literature (Cracknell, 2000; Jackson & Kassam, 1998; Mawdsley, Townsend, & Porter, 2005). In this participatory environment, evaluation is expected to be "a means to facilitate learning about the positive and negative experiences of development co-operation in specific contexts" (Better Evaluation, 2012, p. 7). However, scholars taking an Indigenous view, suggest this appreciation of context has been largely ignored (Howitt & Stevens, 2005; Taylor, 2008, p. 6). They believe contextual awareness requires placing value on holistic thinking and stronger connections to place, community and sovereignty (LaFrance & Nichols, 2010). It means taking time to come to know the critical aspects of Indigenous culture such as world views, appropriate structures of social relationships, relationships to the land, kinship rights and obligations, reciprocities and accountabilities (Taylor, 2008, p. 7), that is, "different ways of seeing the world" (Smith, 1999).

When context is part of the evaluation, evaluation also needs to be mindful of the history of trust and mistrust for communities where one recognises the history and failure of evaluation to serve communities (Burnette & Sanders, 2014; LaFrance & Nichols, 2010; Smith, 1999). In some cases this might call for allowing communities to first vent their frustrations and in doing so, hear how evaluation has been associated with negative judgments, exploitation and oppression. LaFrance and Nichols (2010, pp. 17-18) say this level of contextual awareness is the more genuine opportunity for learning. It is orientating away from conveying judgment and towards appreciating Indigenous values. Indeed, it is for this goal, to strengthen organisational learning, that scholars argue for a greater focus on the *process* of M&E itself (Estrella & Gaventa, 1998; Guijt, 2010).

Process, like context has been largely ignored in M&E because it involves "messy partnerships" (Guijt, 2010). Monitoring relationships as part of this process is not "immediately exciting" (Brinkerhoff, 2002, p. 216), remaining too dynamic and less important than the outcomes themselves. So the challenge as to how one monitors

these becomes difficult and partly explains why it often receives little attention (Holden, 2009).

Irene Gujit, in her work to reimagine monitoring in Brazil, challenges M&E to respect the uniqueness of partners and their own cultures and rhythms of reflection. Her insights reveal the need for dialogue, reflection and realising that learning via monitoring happens through the design process itself rather than the information collected (Guijt, 2010, p. 1032). Similarly, De Coninck, Chaturvedi, Haagsma, Griffioen, and van der Glas (2008, pp. 24-26) talk about the challenge of analysing dynamic, unique contexts and feeling comfortable with 'being, doing and relating' and not just with effective projects. This Western sense of measuring within a discrete timeframe and focusing more on impacts tends to reveal only a partial view, as many scholars point out (Estrella & Gaventa, 1998; Holden, 2009; LaFrance, 2004).

Moreover, it will generally fall short of the Indigenous notion of taking time to fully comprehend what has been learned and how it was learned (LaFrance & Nichols, 2010). Estrella and Gaventa in their work in Zambia, spent time as part of the process and focused on understanding and negotiating stakeholder perspectives. They demonstrate that by taking time to listen to stakeholder perspectives and allow participants to reflect, compare and learn from each other's experiences, a bigger picture of things was revealed. They emphasise the value of this approach is that it allows for a more balanced perspective where the beneficiaries' voices are also heard (Estrella & Gaventa, 1998, pp. 23-25).

More emphasis on context and process when conducting M&E requires a broad commitment to participation from the bottom up. It also demands building partnerships and this requires a level of trust and respect. Indeed, the literature emphasises the importance of building trust and the effort required to develop and maintain it. (Christopher, Watts, McCormick, & Young, 2008; Prinsen, 2015; Torrie, Dalgety, Peace, Roorda, & Bailey, 2015).

The third key theme highlighted in the literature is a call for M&E to be more culturally competent. Before I examine the arguments about cultural competence, a definition of culture and the meaning of cultural competence is useful. Geert Hofstede, defines culture as "those patterns of thinking, feeling and acting …that are shared with people who live in the same environment" (Hofstede, 2005, p. 4). In

his seminal work describing the cultural dimensions of different societies, Hofstede aims to find a basis for mutual understanding despite the enormous variety in culture identities. In this way, cultural competence, or what Hofstede terms, "surviving in a multi-cultural world is understanding first one's own cultural values… and next the cultural values of the others with whom one has to cooperate" (Hofstede, 2005, p. 367). Through a multicultural and cultural competence lens then, evaluators are asked to critically reflect and ask: "What are alternative ways to imagine and value cultural dimensions in evaluation?" (Holden, 2009, p. 431). Holden argues that Culturally Responsive Evaluation (CRE) is trying to push the boundaries of traditional M&E and recognise the contextual dimensions and characteristics of culture that have fundamental importance in evaluation. It demands becoming more attuned to difference and diversity and allowing a space where relationships are cultivated and honored (Kirkhart, 2010, pp. 407-409).

The literature covers many aspects of CRE and three areas for critical awareness stand out. First, awareness of one's own positionality and recognising how research is shaped by relationships, power and ethics (Hopson, 2009; Smith, 1999; Torrie et al., 2015). Second, respect for the "other" which means seeking knowledge of the particular community, building relationships and reflecting on methodological practices. Third, awareness of Indigenous approaches to knowledge generation and how they are in contrast to Western, "evidence based" ways of knowing (LaFrance & Nichols, 2010; Louis, 2007). I will elaborate on these below.

The importance of positionality in relation to developing cultural competence means reflecting on the questions: "What do I know, how do I know what I know, what shapes and has shaped my perspective, with what voice do I share my perspective and what do I do with what I have found?" (Patton, 2011, p. 55). Torrie et al share this view and suggest that how we come to be culturally competent demands grappling with certain complex and sensitive issues that are our inevitable reality. For example, how we deal emotionally with reflecting not just on our own identity and understanding ourselves and our place within society but also with our assumptions about other cultures and traditions (Torrie et al., 2015, pp. 55-57).

Respect for the "other" has emerged as a critical factor for effective evaluation in cross-cultural situations because of lack of knowledge and lack of understanding.

Limited exposure to Indigenous groups has resulted in both a dim understanding of the discrimination and suffering experienced by these communities and an absence of established and trusted relationships (Kirkhart, 2010; Wehipeihana, 2013). Louis (2007, p. 134), notes that any work done in Indigenous communities must be conducted respectfully, from their point of view and have meaning that contributes to the community. While lack of knowledge, for example, not being "fluent" in language or culture, and feeling ill-equipped to design and implement evaluations are other inevitable realities (Torrie et al., 2015, p. 56).

The solution, scholars argue, is to make more effort. For example learning the local language, interacting with Indigenous peoples in their own social and political communities, becoming informed about local concerns and honoring local cultural research protocols (Howitt & Stevens, 2005, pp. 10-11). Respect for the "other" cannot be reduced to a mechanistic capability (such as using the appropriate Māori greetings) but instead is a reflective process involving conscious responsiveness by a practitioner to a particular context and location, at a point in time. For evaluation to be authentic, this respect must extend to understanding the self-determining goals and aspirations of Indigenous communities and their efforts to preserve, restore, and protect their cultures and ways of doing things (LaFrance & Nichols, 2010, p. 18).

Culturally responsive evaluation also means examining new ways to approach knowledge generation, in contrast to Western ways of knowing. It means coming to terms with the demands of Indigenous communities to reshape the purpose of knowledge and ask what counts as proof for this culture? (Torrie et al., 2015). It means appreciating Indigenous work to reclaim their cultures and privilege their unique approaches to protocol and methodologies (LaFrance, 2004; Smith, 1999). Scholars suggest a range of paradigm shifts is needed if *Pākehā* evaluators in New Zealand want to engage meaningfully with cultural competence. For example, from seeing the evaluator as expert to seeing the *Iwi* as expert; revisiting the nature of power-sharing and control of evaluation; and embracing *kōrero tuku iho* (stories handed down) to give voice to experiences and realities often glossed over (Smith, 1999; Torrie et al., 2015; Wehipeihana, 2013). While this is still a "troubled arena"(Torrie et al., 2015, p. 54), conscious attempts to recognise that Māori hold different ontological and epistemological beliefs have led to positive developments and more trusted relationships in the cross cultural evaluation space (Torrie et al., 2015, p. 54). If the inevitable development question is whose reality counts?

(Chambers, 1997) then the question that culturally competent M&E asks is: "Who counts reality?" (Estrella & Gaventa, 1998, p. 3).

Where do relationships and trust fit in this improved understanding of context and process and increased cultural competence? I think the Samoan notion of *Va* helps illuminate the answer. The poet and scholar, Albert Wendt suggests *Va* is the space that is context; giving meaning to things (1996, pp. 42-43)*.* In Pacific communities, *Va* is the between-ness, the space that relates. It is the relationship space between people and their environment and therefore critical for effective evaluation design and practise, it is a key strand. According to Dorothy Fotuali'i Cooper, from the New Zealand Education Review Office (personal communication, April 2016), cultural competence means understanding and connecting with *Va*. Only then, will power differences be accounted for; openness, respect and trust gained and shared learning, ensured. For Caritas, prioritising *Va* will enhance this organisation's ability to navigate Māori evaluation contexts more confidently and to meaningfully engage Māori people in the evaluation process.

In concluding this part of the review, the literature clearly highlights a need to grow understanding within a cultural context of what good M&E looks like. I have outlined the main issues from an Indigenous perspective. These are context, process and cultural responsiveness. To focus more on these aspects requires seeing evaluation not as judging or summing up tool but as a learning tool. To be genuine partners, demands a mutual respect where difference and diversity can be responded to with flexibility and grace.

The literature also reveals that Indigenous peoples' perceptions and understandings of well-being extend beyond, and sometimes conflict with, many of the indicators currently adopted by global reporting frameworks. In the next section, I address *how* we might measure these complex yet meaningful variables.

2.3 REFLECTING INDIGENOUS PERSPECTIVES IN M&E PRACTICE

"This cross cultural encounter involves more than just a recognition of difference – it requires the development of models of bi-cultural or partnership research involving negotiated design, methodologies and outcomes" (Smith, 1999, pp. 173-178).

In this part of the literature review I seek to answer the following question; What

frameworks or indicators exist for monitoring and evaluating trust–based relationships? The answers should assist in answering my research question: "How can monitoring and evaluation be done in ways that reflect trust-based relationships with *tangata whenua* partners?" While the first section of this review identified the critical features for improved M&E from an Indigenous perspective, this section focuses on *how* these features are being reflected in evaluation practices. I research existing conceptual frameworks (across development and other theories) where Indigenous measures, or indicators of well being are central. I explore specific Māori-centred approaches and finally, I consider any particular *trust development* frameworks that have emerged on this pathway to learning for the benefit of Indigenous communities.

In a refreshing u-turn in the debate about indicators, some authors are now searching for alternative ways to legitimise the systems of indicators and so they can capture trends in multidimensional values (Holden, 2009; Mawdsley et al., 2005; Prinsen, 2015; Taylor, 2008). This is in contrast to the thinking by many participatory monitoring and evaluation (PM&E) advocates who have expressed disdain for log frames, with their technical emphasis on measuring results (Cracknell, 2000). The systematic gathering of data has been seen as a negative process requiring no connection to the community it is supposed to benefit (Doig, 2006). While reducing complexity to precise measures is still not the answer, more consideration is being given to how one might apply a systematic approach to explore cultural competence (Torrie et al., 2015). Likewise, a uniform set of indicators to meet the needs of all Indigenous communities is still seen as impractical. Yet there is emerging a set of core beliefs or common values that can serve as a foundation for an Indigenous approach to evaluation (LaFrance & Nichols, 2010, pp. 27-28). With these in mind, an analytical frame can be developed that encourages shared learning and a compromise towards improved trends and indicators for Indigenous well being (Holden, 2009). I will outline some examples of these frameworks as described in the literature.

LaFrance and Nichols (2010) have contributed to an Indigenous framing of sorts in evaluating education to improve achievements in Indigenous populations. Their framework is a reconceptualisation of evaluation from an American Indian and Alaskan Native worldview and is guided by a set of principles that respect Indigenous knowledges and sense of knowing. These principles are first, that context is fundamental and needs to be specific to the place in which the

programmes occur. Second, that an holistic approach, honouring family and living in harmony with community is critical. Third, that respect for a community's sovereignty recognises that evaluation belongs to the community and should be practised in ways that ensure local control and build capacity. Finally, that the pathway to shared learning is not about making judgements but about generating knowledge (2010, pp. 23-25).

The design of the framework is viewed as a journey characterised by some essential steps; creating the story, building the scaffolding, gathering information, and engaging community and celebrating learning. These elements complement the core principles of being place-specific, honouring family and community and sovereignty. There is no single point of entry nor perhaps, a single exit; the process is fluid (Kirkhart, 2010, p. 407).

In applying the framework, several criteria are deemed important. The use of qualitative methods to capture the core values, the need to include culturally distinct indicators and to use storytelling and narrative to present the underlying power dynamics (Burnette & Sanders, 2014; Christopher et al., 2008; LaFrance & Nichols, 2010).

This framework by LaFrance, along with similar ones described by Kirkhart, suggest trust and respect are culturally relevant and paramount considerations.

> "By engaging stakeholders… and explicitly addressing issues of power, culture, context and customs… encourages evaluators to involved in the life of the community to deepen understandings" (Kirkhart, 2010, p. 408).

Without trust, any effort to engage the community in planning and implementing the evaluation and to represent their perspectives in a genuine way would fail. With trust, there are less power differentials between stakeholders and evaluators. Moreover, with trust, issues of power and culture can be explicitly addressed by drawing on community values and traditions.

Meg Holden, in her work with Australian Aborigines, argues for Indigenous community interests to be embraced in indicator systems. However, she cautions that diverse value systems mean different groups need different indicators (Holden, 2009, p. 445). In order to make meaningful collaboration possible, she challenges organisations to 'think beyond data' (2009, p. 14) and develop culturally specific

indicators. In nature, these are qualitative and allow space for values and interests that cannot be described in concise, numerical terms. They capture the diverse systems of belief that are recognised as important yet almost never explicitly considered in decision-making. Holden argues this is because of the difficulty conceptualising, articulating and assessing them (2009, pp. 441-443). In regard to evaluating trust-based relationships, these challenges are relevant. Relationships are part of these complex, dynamic and contextual dimensions. They are difficult to quantify but still in need of monitoring.

Gujit's framework of eight design principles to "rethink impact" includes three that reference relationships and echo similar sentiments about positionality and respecting cultural world views. They are, first, to recognise the nature of actors and partnerships, second, to seek to understand what is needed for critical reflection to be possible among and between the partners and, third, to refocus monitoring on what one is learning *for* not only what one is learning about (Guijt, 2010, p. 1041).

Integrating these culturally distinct indicators with story is also emphasised by other researchers. Holland and Ruedin (2012), for example, argue that narrative allows space to both describe and explain change. It helps to present and interpret the underlying power dynamics that cannot be reduced to numbers and an unbiased truth.

My review has signalled that simplifying complexity with indicators is potentially dangerous. Taylor (2008, p. 411) notes in Australia, the emergence of a number of non-government and community-based studies teasing out the many more varied dimensions of Indigenous well-being but with contradictory desires. For example, communities wanting to live in their ancestral lands weighed up against Government policy for them to participate in mainstream urban economy (2008, p. 123). Taylor, along with others (Holden, 2009; Prinsen, 2015) highlights that any attempt to reduce the complexity of Indigenous circumstances to measurable indicators must overcome the expectation of needing to solve a technical problem.

2.4 MĀORI-CENTRED APPROACHES TO MONITORING AND EVALUATION

I turn now to the literature on specific *Kaupapa Māori* or Māori-centred approaches to evaluation. These approaches demand engagement with Māori ways of being and knowing in the design, implementation, analysis and reporting of evaluations. (Torrie et al., 2015, p. 53). They are processes where Māori evaluation frameworks are applied "by, with and for Māori" (Wehipeihana, 2013). They call for rethinking indicators that assert these self-determining principles. They reflect communities who no longer want to be "done to" (Torrie et al., 2015, p. 53). Ultimately, they challenge Pākehā practitioners, like me, to review our own roles as evaluators. For example, The Māori Framework (Wereta & Bishop, 2006) includes dimensions extending to the pre-eminence of family and community, based around the nurturing of family relations, traditional knowledge about country, the importance of measures of power sharing and governance.

Similarly, the framework by Wehipeihana (2013) invites evaluators to reflect on their evaluation practice in ways that honour cultural perspectives. A realigning of relationships is needed (Estrella & Gaventa, 1998, pp. 12-16) where the needs of the participants are paramount and trust is required to run a bottom-up strategy. Within this context, evaluation is valued when it reflects community values and contributes to cultural revitalisation as learning.

Torrie at al cite similar benefits in applying a common framework in order to promote dialogue, grow consciousness about cultural competence and enhance sensitivity towards the perspectives of the "other". They have designed a heuristic that not only identifies some of these cultural issues faced by Pākehā evaluators but also helps to decontrsuct them using a shared language. Their heuristic "highlights some of the knowledge, language, skills and relationships required in traversing unfamiliar territory" (Torrie et al., 2015, pp. 60-70).

2.5 TRUST-DEVELOPMENT FRAMEWORKS

"Trust, it's exactly the issue to . . . grapple with"
(Burnette & Sanders, 2014).

In the final part of this section, I examine the literature for any frameworks that specifically evaluate trust development and relationships. Burnette and Sanders (2014) explored the experiences of researchers working with Indigenous communities in the United States. Their work, similar to other studies including Christopher et al. (2008); LaFrance (2004) illustrates how Indigenous concepts must first be understood in order to form collaborative partnerships with these communities. Their framework for trust development includes salient multiple concepts that impact on trust development. They assert that by recognising these salient concepts and addressing them, more balanced cross-cultural collaborations will result. The concepts are historical oppression, trust, risk and reputation, power asymmetry, reciprocity and benevolence, and social distance (2014, pp. 1-2).

Like Torrie et al. (2015), these scholars cite Maori academic, Linda Smith (1999) in recognising that within the history of colonisation, Westerners have collected information on Indigenous communities to control and exploit them. This information gathering has often failed to offer any tangible benefits in return and resulted in negative consequences for the communities (2014, p. 14). As a result, research and researchers in many Māori and other Indigenous places have come to be viewed negatively or with suspicion.

Trust itself is salient because community members must trust the evaluators to conduct credible and culturally-sensitive evaluations. This means starting with acknowledging the historical mistrust, acknowledging the context and misgivings around exploitation and harm to participants. Burnette and Sanders assert that where distrust is a barrier to research, it also provides an opportunity to examine factors related to trust development (2014, p. 1).

Smith (1999) also argues the value of relationships from a conceptual viewpoint. She notes that Indigenous people have different orientations towards time and

space, different systems of language and different ideas about progress. She emphasises the importance of affirming connectedness and understanding the notion of respect. "Respect is used by Indigenous people to underscore the significance of our relationships and humanity" (Smith, 1999, p. 55).

Burnette and Sanders note that researchers relied on many strategies to develop trust and balance power relations with Indigenous communities including; demonstrating a positive and transparent intent, building trust through a positive reputation and listening. They found there were certain personal qualities that aided in collaboration, including authenticity, intent, cultural humility, and exhibiting reciprocity (2014, p. 15). Likewise, for scholars Torrie et al, applying their framework gave them insights about the value of trust that provide a fitting conclusion to this section of the review;

> "We have experienced a clear emotional dimension present in some of our conversations, partly derived from having to acknowledge our own not knowing, our perceived lack of competence, ...when articulating potentially new ways forward. We have come to see the capacity to be personally vulnerable with one another as an essential element to engage substantively in the discourse. This kind of dialogue required us to have consciousness of, and care for, ourselves and others, honed listening skills, and openness to multiple ways of seeing. Interpersonal trust was indispensable." (2015, p. 72)

2.6 CONCLUSION

This literature review has helped inform my thinking on Indigenous concepts about trust-based relationships. I have sought to answer the following questions that are aligned to my research questions:

- What are Indigenous perspectives on M&E and specifically on relationships and trust?
- What frameworks or indicators exist for monitoring and evaluating trust–based relationships?

The reviewed authors do not profess to know all the answers. Nevertheless they are engaged in an ongoing conversation about culturally competent M&E. Because of the complexity of problems faced when dealing with development in a cross-cultural context, there is no one, mutually agreed upon, "right" approach, model or

paradigm. Likewise, a singular, common and shared perception of well-being is unlikely (Taylor, 2008). However, their work helps to validate the centrality of trust to relationships and the role of relationships in expanding evaluation practice. From this literature review, it is evident that if the full potential of M&E is to be realised in regard to relationships, it needs to move into understanding that *context*, in its messy, dynamic, reflexive and cross-cultural way, is critical. There is no one way to frame evaluations to be more culturally responsive and in fact it is the richness of perspectives that contribute valuable meaning. It is an ongoing journey to define and implement something relevant (LaFrance & Nichols, 2010).

Finally, I concur with Hopson (2009), that a global movement of evaluation is emerging. It is one that is critically asking questions about methodologies and ways of thinking about programmes and stakeholders that are tuned in to the realities of cultural context and diversity (2009, p. 442). But in order to create further space for hope and social action for Indigenous communities, better questions should be asked about how to capture the value and impact of relationships.

This Indigenous orientation to evaluation is an area with promising potential for future research. Specifically, the tension created by trying to design an indicator system specific to communities of cultural difference is in need of greater research. I believe my case study focus, exploring ways to measure trust-based relationships with specific *tangata whenua* of New Zealand, will bring a fresh perspective to the current body of knowledge.

This literature review has also helped to guide my thinking about the most appropriate methodology for my case study. As (Fife, 2005) notes, thorough grounding in the present literature regarding a specific topic allows the researcher to determine the theoretical approach to help guide what methodology to use. In the next chapter I outline what this methodology looks like.

3. METHODOLOGY

"All research is fraught with complexity. There are no easy answers"
(Mayoux, 2006, p. 123)*.*

3.1 INTRODUCTION

This chapter discusses the methodology used to explore how Caritas Aotearoa (Caritas) can apply monitoring and evaluation in ways that reflect trust-based relationships with *tangata whenua* partners. In particular, it outlines the methodology used to answer my research sub question;

- How do Caritas and the *tangata whenua* partners define trust in terms of their relationship to each other?

I examine several methodological paradigms that have informed my study, as well as particular methods used to collect my data. The cross-cultural context in which I worked was acknowledged in Chapter One and below I oultine the influence of my own positionality to the research topic. Ethical considerations are also explored in terms of their significance to my research approach. I conclude this chapter with examining the limitations of this study in order to determine its overall value.

3.2 POSITIONALITY

All researchers have a particular position vis-à-vis the research topic and research participants and it is impossible for individual bias not to influence the research process in some way (Murray & Overton, 2014, p. 65). Reflecting on my positionality has meant understanding how relevant and influential my point of view, beliefs and experience are in relation to the research context. This self-reflection process extended to exploring how I arrived at my research topic, my epistomological beliefs and my nervousness in undertaking Māori-centred research. But first, it meant confronting two key questions; should I even be doing the research and how I should be conducting it? Time spent in critical self-reflection left me in a "crisis of legitimacy" (Scheyvens & McLennan, 2014, p. 10) as I have pondered my own ethnic identity, my history and my identity through a post-colonial lens. I have questioned my right to analyse and incorporate the views of the "other" (McEwan, 2008, p. 125).

Rather than feel anxious about the exploitative nature of extracting information for my needs, I have tried to reflect on the value this cross-cultural research might contribute. By engaging compassionately, my aim has been to produce research that will enable the participating communities to understand their own contribution to improved evaluation techniques (Scheyvens & McLennan, 2014, p. 10).

For the past few years I have been working with Caritas as a volunteer media advisor and researcher. In March 2015, I had the opportunity to join some of the Caritas team in a trip to the Hokianga in Northland, New Zealand, to visit one of their *tangata whenua* communities. I was moved by the challenges the locals face, living in a limited employment location and struggling with issues of poverty yet committed to being home, in a culturally significant place. I could see a relationship with Caritas was important to them not only in terms of being an advocate and voice for the social injustices they faced but as an organisation that would come and listen and hear their stories.

Following this experience, Caritas asked me to consider a research topic that would meet my Masters requirements and also support their on-going work with their *tangata whenua* partners. They were interested in how they could use monitoring and evaluation to measure the relationship building work they were doing. Caritas invited me as an insider - someone already working within the organisation - to consider this research because they felt my position as such would be reassuring and ensure the participants would talk to me freely and with honesty. Esteemed Māori scholar, Linda Tuawhai-Smith talks of many Indigenous groups wary of outside researchers because of historical experiences where their knowledge was colonised for the benefit of Western science (Smith, 1999). If I had approached Caritas as an academic researcher with no prior relationship or experience of their work, I would more than likely have been declined.

In exploring what this research could look like, I liaised with the Advocacy Manager at Caritas. We discussed challenges, including how Caritas might effectively evaluate its relationships with *tangata whenua* as well as my goal to produce knowledge that might potentially provide solutions to these challenges.

My epistemological beliefs stem from being a Pakeha, Catholic, middle class, tertiary educated, urban-living female in New Zealand. I am part of a Western

system whose ideas and beliefs about human nature and the social world are dominant (Smith, 1999, pp. 49-51). I was raised in Taranaki and now live in Wellington with my partner and three children. While family is central to my values, my perspective is still more individual than that from an Indigenous viewpoint where a more holistic emphasis is given to family, community and environment. I have no direct experience working with Māori communities and speak little *te reo* but I have had the privilege of visiting *marae* with Maori friends on a few occasions and being exposed to their *tikanga*. I have also travelled extensively and experienced many multi-cultural situations that have given give me sensitivity and empathy towards others. My Catholic upbringing connects me to both Caritas and *Te Rūnanga.* My upbringing in Taranaki connects me to the Parihaka community.

The *Kaupapa Māori* perspective, in relation to my positionality has felt somewhat intimidating. Not being a Māori researcher, I was unsure of my capabilities when faced with my own perceived expectation that to do "Māori-centred research requires a Māori analysis and produces Māori knowledge" (Cunningham, 2000, p. 65). Further on in this chapter I describe how I tried to counter my lack of expertise to ensure I could capture nuance, cultural insights and language I was not familiar with.

In short, my positionality imposes certain inherent biases and I have been critically aware of reflecting on these throughout the study. Overall, I feel my upbringing and experiences and insider knowledge of Caritas led to a natural enthusiasm and appreciation for my study.

3.3 METHODOLOGICAL APPROACH TO RESEARCH

3.3.1 THE QUALITATIVE APPROACH

This research is an exploration of meaning behind human behaviours. Throughout the process, I was looking to gain insights into complex, dynamic relationships. This led me to choose qualitative methodology as my approach. Qualitative methodology focuses on "the human experience" (Stewart-Withers, Banks, McGregor, & Meo-Sewabu, 2014, p. 59) exploring social realities and the social world rich with detail and difference. It aims not at precise measurements but a holistic understanding of complex realities (Mayoux, 2006, p. 118). Taking a qualitative perspective also allows for studying communities in their natural environment where they live and work (Stewart-Withers et al., 2014). This was an

important consideration for me in questioning what is happening here and what do these behaviours mean? I wanted the capacity to explore and record but not to minimise complexity in cross-cultural relationships. This is summed up succinctly by (O'Leary, 2014, p. 130);

> "qualititative methodology … accepts multiple perspectives and realities … argues the value of depth over quantity … delves into social complexities in order to explore the interactions, processes, lived experiences and belief systems that are part of individuals … cultural groups and the everyday."

I felt strongly that my research approach reflected the integrity of my research topic. Quantitative methods, with their tendency towards measurement, precision, and statistical analysis (Overton & Van Diermen, 2014, p. 39) often involve little direct contact between researcher and participants. For me, this was not a choice when the importance of building relationships and understanding the meaning behind human interactions was central to my research. A quantitative approach can also discourage participants from conversing at length on the topic. I wanted to ensure my participants had a sense of power in the process by allowing them to share stories and insights freely and openly in the interviews. While some scholars state one can measure Indigenous perceptions in concise, co-constructed indicators (MacGinty, 2013) others feel Indigenous people's perceptions of trust-based relationships extend beyond concise, standarised indicators (Taylor, 2008). On balancing these divergent views, I determined that my study required meaningful engagement to try to reveal intricate dimensions of trust.

Yet, while an overall qualitative approach to this research is appropriate, there is not just one paradigmatic way of knowing (O'Leary, 2014). I outline below the three qualitative frameworks relevant to my specific research design. These include phenomenology, case study, and Māori-centred research.

3.3.2 PHENOMENOLOGY

A phenomenological framework guided my approach because it allows for ambiguous human views. It rejects the notion of one universal reality and accepts the validity of different experiences and viewpoints. Phenomenology has been described as a "philosophical movement based on a self-critical methodology for examining and describing lived experiences" (Reeder, 2010, p. 21). It allows for describing experiences in a way that does not gloss over the complexities and contradictions of real life (Taylor, 2008). Through this lens, individuals are central to

the study but it is their descriptions of lived experiences rather than they, themselves that are the focus. It answers questions about understanding an experience from those who have lived it (Denscombe, 2014, p. 98).

I was exploring the experience of the individual and trust. My approach would have me asking participants what the 'phenomenon' of trust feels like and how they would describe its dimensions. I wanted them to reflect on their descriptions and "dig below the surface to understand the meaning behind them" (Taylor, 2008, p. 215).

3.3.3 CASE STUDY METHOD

Another guide to my research was the case study framework. This can be defined as "an intensive, holisitc description and analysis of a single, bounded unit" (Merriam, 1998, p. 193). My intent was to put a boundary around Caritas and thereby keep the focus of my inquiry to this organisation's specific relationship with two selected Māori communities (Patton, 2011, p. 259). This clearly defined and highly relevant context (O'Leary, 2014, p. 195) allowed me to draw on Caritas' activity and experience and then apply my own analysis. With room for holistic description, I was able to capture various nuances and patterns that other research methods might have overlooked.

3.3.4 INDIGENOUS RESEARCH

I was also guided by an Indigenous approach that privileges Indigenous knowledges, voices and experiences (Scheyvens, Scheyvens, & Murray, 2014). This framework demands a paradigmatic shift to see the world through alternative eyes and query the way knowledge is produced (Wehipeihana, 2013). As an insider with Caritas, I was privileged to do this research and to give voice to the interests of Māori people. For Caritas, the issue of "cultural safety" (Cunningham, 2000, p. 67) amongst Māori communities with whom they work is paramount. The organisation understands these *tangata whenua* are wary of outside researchers because as already discussed, their historical experiences have been framed by imperialism and their knowledge colonised (Smith, 1999). For this reason, I was aware I would not be welcome to undertake this study as a non-Māori if I made the approach as an independent academic. Guided by a Māori-centred approach. I was challenged to recognise my Western positionality and to be careful not to "misrepresent or essentialise Indigenous persons, nor deny them a voice or identity" (Denzin, Lincoln, & Smith, 2008, p. 5).

Guided by this framework, I developed a cultural responsive practice with advice from my Māori research partner, Mr Taneora Ryall (as outlined in Ethics section below). He advised me what was acceptable and not acceptable from each community's perspective. As Denzin emphasises (2008, p. 5), this Indigenous focus helped to locate the power within the Indigenous communities and make the Western systems of knowledge the object of critique and inquiry. Mr Ryall's shared language, insight and *tikanga* was critical to establishing a level of trust and sincerity between myself as researcher and all of the participants. Ultimately, as a non Māori, I could not say I was doing Indigenous research but I could ensure my approach respected and prioritised the world through their eyes.

3.3.5 ACTION RESEARCH AS A STRATEGY

With this overall understanding of the qualitative tradition and various perspectives, I tried to strategically position my study as action research. Action research begins with the idea that research should do more than understand the world, it should help change it (Tolich & Davidson, 2003, p. 131). This strategy best aligned with my goal of improving professional practice within a real life situation dealing with real world issues. Ultimately, I hope to contribute to improving Caritas' understanding of how it could apply evaluation methods to measure trust. Action research also places high value on local knowledge and collaboration. In my case study context, I have been "standing with and alongside" (Berg, 2009, p. 317) Caritas to conduct the research, not outside as an external consultant. This has meant appreciating the broad combination of social, economic and political aspects of relationships and interactions between Caritas, the stakeholders and myself as researcher. However, it is important to note that this report is embargoed and only Caritas has the authority to release it further. As a consequence, the potential for this study to be shared, in order to actively apply the specific learnings around measuring and monitoring trust, relies on the discretion of Caritas.

3.4 ETHICS

Certain ethical considerations were also examined in preparing this research. In outlining them here, I have reflected on my personal goal for this research, which is integrity: integrity in terms of capturing "truth" in the knowledge I produce and integrity in the way I worked to ensure my participants' rights and well-being were protected throughout the research process (O'Leary, 2014, p. 47).

I completed a Development Studies In-House Ethics Form in accordance with the Massey University 'Code of Ethical Conduct for Research, Teaching and Evaluations Involving Human Participants'. This included consideration of informed consent, privacy and confidentiality, conducting culturally sensitive research, and conflict of interest. This Ethics Form was then discussed at a Skype meeting between myself, my supervisor and another Development Studies staff member on Friday 4 March 2016. Given my working relationship with Caritas and the case study perspective of my research, the issue of conflict of roles was significantly explored. Following this meeting, I submitted the Massey University Health and Ethics Committee online screening form. My research was considered low risk and acknowledgement of the low risk nature of my project is attached in **Appendix One.**

All participation by *tangata whenua* in my study was voluntary. I received verbal consent from each participant prior to undertaking research. All participants received a letter and a brief outline of the purpose of my study (**see Appendix Two**). I wanted them to be clear what the study was about, what it might be used for and who would be able access the information. I explained they had a right to decline to answer particular questions or withdraw completely (with no negative consequences as a result). This consent raised the issue of confidentiality, a major ethical tenet of research. As my research is a case study with Caritas, and Caritas staff helped select my participants, I could not guarantee their anonymity. While I did state that I would take care to disguise their identity by using generic labels, (I noted the interviewees as Participant One, Two, Three, Four and Five, specifying if they were from either Caritas or one of the *tangata whenua* communities), I could not guarantee their identity would not be traced back to their organisations. Everyone consented and there were two requests during the course of the interviews for comments to be "off the record."

Potential harm is another major ethical issue. I needed to ensure no participant would be harmed, either by their participation nor by publicising the results of the study (Fife, 2005, p. 12). Some further issues with confidentiality and potential harm are noted below.

First, my research partner needed to be bound by the same confidentiality agreement as everyone else. He was a part-time staff of member of Caritas but in

this case, as a research partner, it was important he understood the nature and expectation of the research, especially that what was shared in the interviews was confidential. Secondly, dissemination of the final report needed to be considered. Fortunately, I was able to guarantee its limited spread. As this study fulfills a 60-credit report and not a 120-credit Masters Thesis, it does not go into the Massey Library and therefore is not publicly accessible. I was able to request that this report be embargoed, that is restricted to viewing by only three people; my supervisor, an examiner and a moderator. Consequently, it cannot be disclosed until approval is obtained and only Caritas has the power to release it further.

Reflecting on issues of potential harm was particularly relevant because in its very essence, this study explores relationships and the dimensions of trust. I was conscious that information might be revealed in the course of the interviewing process that could be damaging to the ongoing business or professional relationship betweeen Parihaka and Caritas or between *Te Rūnanga* and Caritas. To mitigate this risk, I was careful to disclose only information revealed in the course of the interviews that was actually relevant to my research. My aim was always to reflect constructively on ways Caritas could improve and learn from current interactions with the *tangata whenua* with whom they are in relationship. Using my "own sense of justice" (Fife, 2005, p. 13), I would continuously ask myself: Am I doing anything that might impact on the dignity of the people with whom I am working?

As a non Māori working with a Māori community I also had an ethical mandate to conduct culturally sensitive research. As Smith (1999) notes, research ethics for Māori communities extend far beyond straightforward aspects like individual consent and confidentiality. Guided by the Māori-centred approach, I demonstrated respect by adhering to their cultural expectations, or *Kaupapa Māori* practices, when I conducted research in the Parihaka community.

Smith (1999, p. 120) explains these as:

- *Aroha ki te tangata*   (a respect for people)
- *Kanohi ki kanohi*   (the seen face, that is present yourself to the people face to face)
- *Titiro, whakarongo… korero*   (look, listen…speak)
- *Manaaki ki te tangata*   (share and host people, be generous)

- *Kaua e takahia te mana o te tangata*   (do not trample over the dignity of the people)
- *Kaua e mahaki*   (do not flaunt your knowledge)

My Māori research partner, Mr Taneora Ryall, also supported me. His shared language and cultural identity were advantageous in ensuring I adhered to this ethical code of conduct. Despite being a Caritas employee, Mr Ryall also acted as a 'way-maker' for the cultural safety of both the participants and myself. This was a complex double role but it ensured the smooth facilitation of the research process. In terms of these Māori cultural expectations, *Manaaki ki te tangata*, the notion being generous is of particular importance.

Likewise, reciprocity, or giving back is an essential behaviour when engaging with Māori people (Pohatu, 2013). I wanted to ensure that my investigation would be beneficial to the respondents as well. This reciprocity took several forms. I learned more *te reo* to demonstrate I valued and respected their language, I offered gifts in appreciation to my interviewees and I intend to share the results of my research with the community, in ongoing ways. In a co-presentation with Caritas and a *tangata whenua* partner, I presented the findings of this study at an International Development Conference in Wellington in December 2016. Ultimately, I hope all the stakeholders with whom I worked will have access to the completed research report. This intention aligns with my strategy of producing action research, that is research that makes a contribution to how Caritas might continue to work with its *tangata whenua* partners to bring positive change in one way or another (Tolich & Davidson, 1999, p. 129).

Two further ethical issues are of note; data security and conflict of roles. To ensure security of my data I safely stored all my notes, transcripts and electronic media in a password-secured, backed-up file. I used an iPhone voice recorder to record interviews and had another iPhone on hand as a back-up if necessary. Reflecting on any conflict of role was likewise, an important ethical concern. As a volunteer with Caritas for several years, I had helped the organisation with media relations and advocacy work and yet I had not worked with these particular communities. I would be coming to see them for the first time as a researcher.

The Caritas staff, on one hand, might be clear about my role as a researcher for this project, yet the *tangata whenua* communities would likely perceive me to be

associated with the Caritas team. It was important that I, as well as the Caritas colleagues reassured these communities of my role and that my aim was to help Caritas improve its work. I wanted to make it very clear to the *tangata whenua* that I was not there to tell their communities what they 'should' be doing. In essence, I was aware there could be diverging views on who I was and what my role was. I had to balance these expectations carefully and be clear about my role and independence in order to put my participants at ease.

Following due consideration to these ethical issues, I began the process of collecting the data.

3.5 DATA COLLECTION METHODS

My choice of methods was informed by the qualitative approach I selected to answer my research questions. My methods included open-ended, semi-structured interviews, participant observations and document analysis. Some of the key challenges with qualitative methods involve ensuring the data is valid, reliable, rigorous and trustworthy (Stewart-Withers et al., 2014, p. 79). I addressed these challenges in several ways. First, by choosing methods that aligned with my questions to ensure a systematic process and, second, by triangulating multiple, complementary data sources, I hoped to preserve the data's validity and authenticity (Mikkelsen, 2005). Using a field journal for reflection was a further instrument utilised to reflect on my potential biases.

3.5.1 SELECTING PARTICIPANTS

My sampling was purposive. Caritas Aotearoa selected the people I would interview in the Māori communities. These people were chosen on the strength of their connection to Caritas and potential to offer unbiased, useful opinions in relation to my topic. The choice highlighted the challenge of accessing those "who are open and honest, with good memories, not afraid to expose themselves nor see themselves in a good light" (O'Leary, 2014, p. 198). I interviewed five people in June in 2016 from across three communities:

Caritas Aotearoa New Zealand

Caritas Aotearoa is the Catholic agency for justice, peace and development based in Wellington. Practicising social justice through a Catholic lens, the organisation has 21 full and part-time staff in Wellington and two staff members based in Auckland. I interviewed Lisa Beech, the advocacy manager and Murray Shearer, a member of the Programmes team. My research partner, Taneora Ryall, is the *Kaihāpai Māori* for Caritas. These three people already had established relationships with the Māori communities.

Parihaka

Parihaka is a small, rural Māori community living around three marae. It is situated in South Taranaki between Mt Taranaki and the Tasman Sea. Parihaka is famous for being home to Te Whiti and Tohu, two visionary Māori leaders who inspired their people towards peaceful resistance during the Taranaki Māori wars of 1860-1869. The legacy of their actions and the principles of non-violence, equality and collective action still inspire the Parihaka community today. I interviewed Charissa Waerea, an actively engaged member of the Parihaka community.

Te Rūnanga o Te Hāhi Katorika

Te Rūnanga is the national Catholic Māori Council. Its role is to advise the New Zealand Catholic Bishops on matters concerning Māori within the Catholic Church and in society in general. The council has a small executive of six people. It is the primary body of Māori consultation for Caritas. I interviewed Maru Karatea-Goddard and Sister Tui Cadigan.

The selection of participants was considered appropriate for several reasons. In order to achieve a balanced view, I wanted to interview people within Caritas, on behalf of whom I was conducting this case study. Parihaka was chosen as a Māori community with whom Caritas has had an ongoing relationship for several years. And *Te Rūnanga,* was chosen because of its wider community perspective on Caritas and how it relates to Māori stakeholders. *Te Rūnanga* is not a direct recipient of Caritas official support (beyond generous *koha*) but is influential in how Caritas is perceived within Catholic Māori whanau in New Zealand.

3.5.2 SEMI-STRUCTURED INTERVIEWS

Semi structured interviews allow for flexibility within structured parameters (Bailey, 2007, p. 100). I was guided by an interview framework with specific questions broadly relating to research questions. However, as I was more interested in flow and discussion, I was flexible in terms of the order of questions and keen for dialogue and engagement rather than just simple answers to my questions. I scheduled the interviews in advance and gave my participants an indication of how long they would take. **See Appendix Three** for the questions I covered.

As I was not experienced in conducting interviews and felt quite intimidated about the content, I conducted pilot interviews beforehand, with some friends and family. I recognised that good interviews require practice (Bailey, 2007; O'Leary, 2014). This was invaluable to becoming familiar not just with my questions but, as Bailey (2007, p. 104) notes, making a good first impression in the time *before* the first question was asked. Care for establishing rapport and respecting the Māori cultural expectations required practice and confidence. Due consideration was also given to how I might capture different local perceptions and descriptions (Mayoux, 2006, p. 118) when language and cultural differences would be challenging.

Conducting face to face interviews in a cross-cultural context also highlighted potential power issues which I needed to address. I tried to optimise the opportunity for participants' empowerment and ensure they could see the benefit of the research. I wanted to establish a shared sense of power where they could see I valued their input and alternative way of knowing. One way of reflecting this in my research design was to include longer quotes when writing up my findings in Chapter Four. This way, I could safely capture the essence of what my participants were telling me. The interviews were also conducted at a place of their choosing to ensure they felt comfortable.

All five interviews ran smoothly. Everyone was happy to talk and it was clear it was a topic that they felt passionately about. Both positive comments and some criticism were expressed. For one participant, the questions raised many emotions and some of her answers in return were often abrupt and challenging. As another participant said, "trust is hard" and I felt grateful these people were prepared to share their honest, unbiased opinions about something tricky and complex. Their honesty and passionate opinions conributed to the richness of the data. I offered a

small *koha* to the all interviewees in appreciation of their time and effort to support this research.

3.5.3 PARTICIPANT OBSERVATION

The goal for many qualitative researchers is not just to describe, but to understand. (Bailey, 2007, p. 90) Participant observation is an effective method to aid understanding. I was able to observe my participants at a *Hui ā tau* that took place at Parihaka in September 2016. This is an annual forum organised by Caritas where all the *tangata whenua* communities are invited to come together to discuss issues. Three out of five of my research participants were present but all of their organisations were represented. The *Hui* involved a two-night stay on the *marae* over a weekend. Attendence at this *Hui* was a privilege. I was welcomed to attend based on my work and involvement with Caritas. My invitation was only forthcoming because the Māori community trusted Caritas and trusted that I was supporting their work through my research.

A "culturally defined forum" (Stewart-Withers et al., 2014, p. 65) for Māori, *Hui* combine formal and informal aspects for gathering and discussion. As O'Leary (2014, p. 237) emphasises it is an effective way to see what participants actually do, not just hear what they say they do. Nevertheless, there were challenges, particularly my limited cultural and language knowledge and the need to be aware as well as analytical. I tried to mitigate these in a number of ways.

First, together with Mr Ryall as my research partner, I discussed beforehand preconceived expectations for what I thought might occur and what I might observe, what my role would be and how involved I would be in the events. Second, Mr Ryall was invaluable in helping interpret formal proceedings and I was able to ask him to confirm my insights and understanding with his own, to keep a check on my own subjectivities. Finally, I noted in my journal precisely what I would be observing in regard to my research questions. I decided to observe how attendees physically expressed three of these indicators for trust that were discussed in the interviews. Namely; how willing participants were to go beyond expectations, their acceptance of being challenged and questioned and how they interacted in the 'in between' spaces. I observed who carried out these behaviours, who did not, with what frequency and what the behaviours looked like in action. A

complete picture for this study on trust-based relationships relied on searching for behaviours of distrust or lack of trust as well (Bailey, 2007).

3.5.4 DOCUMENT ANALYSIS

The third data source I used was document analysis. This added another rich layer to explore what my participants "think, feel and believe" (Stewart-Withers et al., 2014, p. 65). I examined the following official texts from Caritas:

- Strategic Goals Summary 2013-2017
- Operational Plan for the *Tangata Whenua* Workstream
- Project Criteria for the Caritas *Tangata Whenua* Fund

In reviewing, I had to question in advance: "What was I looking for and how would it contribute to my understanding?" (O'Leary, 2014, p. 244). This demanded the same rigour as my other methods and being sure to filter the data for material only relevant to my study. I had to consider whether the texts were accurate and unbiased in terms of who produced them and for whom. Furthermore, faced with my own subjective bias, I tried to make sense of the data with an open mind. To do this I compiled a table to avoid aimlessly reviewing and to keep my focus on the content related to the research question. I was looking for content related to how expressions of trust in the Caritas–*tangata whenua* relationship were reflected in the documents **(see 4.2.1 for Table of Data Sources).**

My document analysis was purely a content analysis to help triangulate my interview findings. This was appropriate because I was dealing with organisational plans and strategies that were straightforward to understand. While content analysis is limited in that it doesn't deal with implied meanings (Denscombe, 2014, p. 284) it was not my intention to reveal these. Indeed**,** while critical discourse analysis - that is, focusing on the implied meaning of the text rather than its explicit content - has a certain political "bite" (Denscombe, 2014, p. 288), it was not necessary in my case.

3.6 LIMITATIONS OF THE RESEARCH APPROACH

My study involved in-depth interviews in order to establish trust and draw richer insights from participants. Given the time-consuming nature of this method, I interviewed just five people**.** Choosing qualitative research with a small sample size as well as an action research intent, means I cannot generalise results to other

populations (Mayoux, 2006). The place-specific context of *tangata whenua* communities adds another layer of difficulty to this issue. Some academics assert the value of case studies to generally provide understanding about similar groups. For instance, Berg (2009, p. 329) argues they can serve as a breeding ground for hypotheses that may be applied to subsequent studies. However, I was simply happy that my study might provide a constructive framework for trust for Caritas and its *tangata whenua* partners to use as a tool for monitoring and evaluation purposes.

I believe this case study approach to my topic was appropriate because I was exploring Caritas as one case, one organisation that might acquire new knowledge around evaluating dimensions of trust. I do not presume in any way that the insights this study provides into expressions of trust can explain the behaviours of *all* other organisations. However, I hope they might suggest explanations for *some* organisations' behaviours.

3.7 CONCLUDING REMARKS

The process of critically examining methodological approaches and finding the right perspective from which to view this study took time and consideration. I have been confronted with the challenge that research can be tense and answers are not always forthcoming. Reflecting on methodology has tested me on a number of grounds. First, to consider my personal subjectivities in exploring how I will build trust and capture essence in light of cross-cultural expectations. Second, to reflect on what integrity and meaningful data looks like in light of my responsibility for the dignity and welfare of my participants. Finally, to critically consider how meaning comes not just from social behaviours but from understanding specific situations in a broader historical and political context.

Having outlined my methodology and data collection methods, the next chapter presents a data analysis and then presentation of my research findings.

4. FINDINGS

"The word trust is a very important word. It is hard. Trusting is you have to have a relationship with people. You can't trust someone if you don't spend much time. The more time you spend with someone the more you know when they are ok or not ok, happy or sad"
(Participant Four, Te Rūnanga).

4.1 INTRODUCTION

In this Chapter I present my findings in relation to the research aim which is:

- To explore how Caritas can use monitoring and evaluation to develop trust-based relationships with *tangata whenua*.

In the first section I begin by outlining my data sources and explain how these were analysed. In the second section I present findings in relation to my sub question:

- How do Caritas and the *tangata whenua* partners define trust in terms of their relationship to each other?

I conclude this chapter with some insights from participants as to how to monitor and evaluate their recommended indicators for trust.

4.2 DATA ANALYSIS

4.2.1 TABLE 1 : DATA SOURCES

Source of Data	Research Method	Format	Research Questions
Interviews	Face to face Interviews	Transcripts	How do Caritas Aotearoa and the *tangata whenua* groups define trust in terms of their relationship to each other?
Caritas Strategic Plan 2013-2017 Tangata Whenua Plan 2016 Project Criteria for the *Tangata Whenua* Fund 2016	Documents	Text	How are the expressions of trust in the Caritas –*tangata whenua* relationship reflected in the documents?
Caritas *Hui ā tau* held at Parihaka September 2-4 2016	Observation	Written observations	How are the expressions of trust in the Caritas -*tangata whenua* relationship reflected in human interactions at the *Hui ā tau.*

Analysing the data is a critical part of the research process. While methodology and findings are often well covered in research, an account of the process leading from data collection to concluded findings is often ignored (Denscombe, 2014, p. 294). In terms of my largest source of data, the interviews, I analysed my collected transcripts through a series of steps including preparation, exploration and categorisation before finally arriving at presentation of findings.

4.2.2 ANALYSING THE INTERVIEWS

Having listened to my participants and recorded many hours of interviews, I needed to make sense of the information I had captured. First, since I was interviewing only five people I was able to re-listen to all the interviews and

transcribe them verbatim. This immersive process was necessary to become familiar with the amount of rich and complex data before me.

The next step was to spend time exploring the data and really listening in to the stories shared. I was looking for emerging themes and contrasting views and trying to understand them holistically. I was aware I had been given privileged information and valuable insights based on my participants' knowledge and experience. Therefore, I took time to highlight exact words and extract quotes to retain in the findings. I found I needed to listen more than once to ensure I did not take any comments out of context or unfairly represent any of my respondents.

Next, I coded my data according to participant responses about what trust looks like and how the process of monitoring and evaluation might occur. I then grouped my codes into categories in order to classify the answers under key headings. This coding and classifying helped me determine the relevance of all my data to answering my research questions. This was a critical time in developing my findings. It was a process of interrogating the data, examining it for a fit with the literature, being open to insights and even an emerging theory (O'Leary, 2014, p. 308).

4.2.3 ORGANISING MY DATA - A NARRATIVE APPROACH

My research involved an exploration of behaviours related to trust. Graphs and percentages would not reveal the meaning or significance behind people's words and actions. I felt the power of this qualitative data lay in sharing real stories to present and identify the underlying power dynamics. But I was mindful that in producing an academic research report, I needed to strike a delicate balance between how many direct participant quotes to use to convey the story versus offering my own interpretation of their words (Holland & Ruedin, 2012).

Moreover, my sample size of interviewees was very small and trying to aggregate answers into percentage form would be misleading as well as meaningless. Therefore I opted for a narrative approach. I chose to group my findings under themes as they related to the trust indicators. In quoting my participants directly, I chose to name them simply Participant One, Two, Three, Four and Five, in order to disguise their identity as well as could be achieved with a small sample size. All participants were between the age of 30 – 60 years old and their sex was as follows;

Participant One, Caritas	Male
Participant Two, Caritas	Female
Participant Three, Te Rūnanga	Female
Participant Four, Te Rūnanga	Female
Participant Five, Parihaka	Female

To validate the insights from my interviews, I weaved evidence into the narrative from a document analysis and observations at the *Hui ā tau*.

4.3 FINDINGS

4.3.1 EXPLORING TRUST-BASED BEHAVIOURS IN RELATIONSHIPS

This section outlines the findings in relation to my sub question:

- How do Caritas Aotearoa and the *tangata whenua* partners define trust in terms of their relationship to each other?

According to one of my Caritas participants, "trust is central to our tangata whenua relationships" (Participant Two, Caritas). However, the organisation does not have a framework it can use to measure trust and to then see how well it is doing. Both Caritas and the partners believe indicators for trust lie in reconceptualising evaluation from a Maori world view. By exploring what the behaviours of trust look like for each group, I hoped to assist Caritas to find an appropriate way to monitor and evaluate their trust-based relationships.

Based on my literature review, I knew I would not be looking for one clear definition nor universal measure that might be used to qualify trust. Rather, I would be exploring concepts that might be seen as proxy indicators to evaluate trust. My findings back up some of the indicators sourced in the literature as well as revealing additional behaviours specific to the Caritas and *tangata whenua* participants in this study. Combined, these behaviours form the basis for a simple framework. In Chapter Five, I present this framework and consider more widely how the findings connect to both my research aim and literature review. Here, I describe each of the concepts and illustrate by way of themes, narrative and quotes, how the participants believed these concepts indicated trust in relationships.

4.3.2 THE FOUNDATIONAL BUILDING BLOCKS FOR TRUST

All five participants mentioned similar, multi-dimensional concepts as the building blocks for trust. These are; understanding the historical context, being culturally competent, reflecting place-specific community values and sharing a vision. They are "the up-front work of investing in relationship" according to Participant One, Caritas. All participants agreed these concepts needed to be respected first, or laid down as the foundation, in order to form genuine relationships. The following narrative describes the importance of these foundational principles to my participants.

Understanding the Historical Context

> *"You need to know who we are, you need to know where we came from"* (Participant Four, Te Rūnanga).

Participants described historical context as understanding the historical oppression and the history of colonisation. Having knowledge of the invasion of Parihaka and the passive resistance approach taken by the leaders Te Whiti and Tohu was important. They described the purpose of understanding context as accepting there may be distrust and not taking a relationship for granted.

> **"**We go in with this history and baggage, We carry all of this and then hope to engage in a way that is positive and affirming…. We go in not to perpetuate that but go in as learners, as listeners, with no agenda" (Participant Two, Caritas).

Cultural Competence

Participants felt a certain level of cultural competence was a necessary and fundamental underpinning of a trusting relationship.

> "We need to not only understand the importance of tikanga and have a basic level of *te reo* but we need to embrace specific expectations too, like women wearing skirts and women not speaking on the *paepae"* (Participant Two, Caritas).

Tangata whenua participants described this cultural competence as not being shy on the *marae* and showing you have made an effort.

> "Being committed to practising our protocols and values, that is the legacy of *Te Whiti* and *Tohu*" (Participant Five, Parihaka).

> "Yes we have etiquette and protocols. So we should. What is there to be nervous about? Don't be nervous. Get on with it" (Participant Four, Te Rūnanga).

Place-Specific Community Values

Aligned with cultural competency, *tangata whenua* participants described the importance of connecting with community and partaking in community events as "how you learn." (Participant Three, Te Runanga). They believed there needed to be an awareness of what *tangata whenua* stood for.

> "You don't need professional development outside of Parihaka. The professional development is coming and interacting with our community… *Tangata whenua* translates as people of the particular land that you are working with. It's specific to where you are standing." These are people grounded to the earth they stand upon" (Participant Five, Parihaka).

Participant Five, Parihaka, indicated the preference to be known as *tangata whenua* rather than Indigenous people of Aotearoa. Using terms that are mindful of this place specific context are important for trust–based relationships.

I analysed both the Caritas Strategic Plan 2013-2017 and the Operational Plan for the *Tangata Whenua* Workstream 2016 to validate these interview findings. The Caritas Strategic Plan 2013-2017 uses the words "Indigenous peoples" in Goal Three.[3] But the *Tangata Whenua* Workstream Plan replaces the words Indigenous peoples with "*tangata whenua* of *Aotearoa".* [4] The change of words in the documents demonstrates consideration and respect to the place-specific community values that were expressed in my interviews.

Shared Vision

Alongside community values, participants saw a respect for a shared vision and values as fundamental to a trust based relationship. Smith (1999) calls this "affirming connectedness." This was something Participant One, Caritas, reflected on;

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[3] (Caritas, 2016c) Goal 3: Increase our partnership with Indigenous people of Aotearoa so that our advocacy and programmes respond to their needs and those of other Indigenous communities.

[4] Tangata Whenua Plan 2016 (Caritas, 2016a) The specific goal in this plan is:
'Increase our partnership with *tangata whenua* of Aotearoa so that our advocacy and programmes respond to their needs and those of other Indigenous communities.'

"Have we got enough of a relationship to confront our differences? Is our shared vision that they allow us to be who we are and we allow them to be who they are?"

Participant Five, Parihaka, explained this shared vision as;
"Having a common understanding of the future focus. For example, interacting and attending as many of our community events as possible."

4.3.3 THE BEHAVIOURS THAT DEEPEN TRUST

Building on these four foundational building blocks for trust, participants all spoke of similar behaviours that they felt defined trust further. I have grouped their thoughts under ten themes. I see these as "trust warranting" signs (Burnette & Sanders, 2014, p. 4) radiating out from the heart of a relationship. My participants suggested it is through commitment to these values that trust grows in a relationship. They are listed as follows, in no particular order;

1. *Kanohi ki te kanohi* (Face to face)
2. Going beyond the minimally required
3. Challenging and questioning
4. Understanding time
5. Interacting in the marae setting
6. Interacting in the in-between spaces
7. Listening genuinely
8. Committing as an organisation
9. Contributing funds
10. Contributing new knowledge and connections

1. Kanohi ki te kanohi: Face to face

Participants agreed that continuing to show up for face to face encounters is the best approach to building a cross cultural relationship. In *Māori* this is known as *kanohi ki te kanohi).* According to my Caritas research partner, Mr Ryall;
"If your face is seen you have a better chance of building up a relationship. You just don't have the standing if you don't turn up."

Tangata whenua participants agreed that when dealing cross culturally *kanohi ki te kanohi* is an advantage because unless you see the face, you do not see the body language.

"It means accepting you need to do more than just send a letter. It means continuing to show up time after time and being ok with that. This takes time and effort and budget and you have to be ok with that." (Participant Three, Te Rūnanga)

A commitment to relationship means making more time available for face to face meetings. As a Caritas participant described its value;

"We know Parihaka accommodates for those groups that just rock up – they hear the story, they *hongi* and you never see from them again. But their message to us is; 'Caritas is different, they came and listened, they came back, they keep coming back'" (Participant One, Caritas).

The Project Criteria for the Caritas *Tangata Whenua* Fund (Caritas, 2016b), was another of the documents I examined to validate my interview findings. In this document, face to face meetings, as an expression of relationship building, is made explicit under the heading 'Procedures';

"Where possible, a meeting *kanohi-ki-te-kanohi* will be set up at an early stage to establish the relationship and to discuss possible projects" (Caritas, 2016b, p. 2).

2. Going beyond the minimally required

The Caritas participants talked about being prepared to make changes, going beyond where they are now and not imposing their version of things on others. That is;

"not thinking or acting in an exclusively Pakeha world view" (Participant Two, Caritas).

They saw this 'going beyond' as about taking cultural competence to the next level. That is, not leaving the *reo* and *tikanga* solely to the *Kaihāpai Māori* role but supporting him with staff-wide *waiata* and everyone trying out a little more conversational *reo* on the *paepae*.

"For Caritas staff to invest more time and commitment to learning *te reo* so that we can use the *waikorero* and *te pepeha* to explain who Caritas is and what they do. This is not possible if we are always waiting for the Māori formalities to be over then for the 'real' conversations to begin in English" (Participant Two, Caritas, Female).

Participant Two also saw this effort and willingness aspect as going beyond the stereotypes on both sides. She spoke of "not romanticising Parihaka as some peaceful unitary community but as a complex vibrant place." And so too, "helping ensure partners see Caritas not as colonial oppressors or sources of funds but like-minded people on the same page."

Tangata whenua participants also recognised a commitment to go beyond the minimum level of a greeting was important for trust to be deepened.

> "*Kia ora* is not good enough. You should be learning *Manaakitanga* Maori. You need to know how we think and what we need. If you can't do this in Aoteaora, how can you profess to do it overseas?' If you are going to be speaking for your organisation you need basic understanding of *tikanga*" (Participant Four, Te Rūnanga).

They also looked for respect shown for the *Kaihāpai Māori* role. They believed that for Caritas to invest in this role was a sign of being willing to go further and it reflected a respect for relationship-building with *tangata whenua* partners.

> "It would be ideal to see the *Kaihāpai Māori* role as a full-time job. If not for two people" (Participant Four, Te Rūnanga).

To validate these interview findings, I chose to observe how people displayed this effort to extend themselves at the Caritas *Hui ā tau* in September 2016. I observed a willingness to take cultural competence to the next level, at various stages of the *Hui*. First, at the *pōwhiri* there was 100 percent adherence to the *tikanga* of *marae* (e.g. women all wore skirts, shoes were taken off, no-one sat on pillows or tables and there was no food in the *wharenui*). While these actions were a sign of basic cultural competence, it was significant that everyone took them seriously. In an effort to go beyond, not only did everyone manage to introduce themselves in *te reo*, but 50% of attendees took this further by talking about their roles and work in *te reo*. The *waiata* sung by Caritas were clearly well rehearsed, delivered with confidence and without songsheets. An encouragement by the hosts for everyone to try to speak Maori in the *wharenui*, even after the formalities were over, was embraced by two or three Caritas staff. This was also reflected in the Mass, held in *te reo* on the Saturday evening in the *wharenui*.

3.   Challenging and questioning

Both Caritas and the *tangata whenua* participants spoke of a willingness to be challenged in a constructive way, as a sign of trust. They believed a good relationship demanded an ability to withstand criticism and see it as a learning opportunity.

> "To be challenged and questioned is a sign of trust. I think there is actually maybe something wrong if we are not being questioned and being put on the spot a bit!" (Participant Two, Caritas).

"There should not be any subjects we are not willing to put on the table. This is the deeper notion of *korero*. To have not just 'talk' but honest and robust conversations together. Being free to speak and not being afraid to speak out of fear of prejudice" (Participant Four, Te Rūnanga).

"I think we are ready for more deeper and honest conversations and challenges and the difficulty is I'm not sure everyone in the organisation is ready for that" (Participant One, Caritas).

At the *Hui ā tau* I observed one of the *tangata whenua* participants take the opportunity in the public forum to challenge Caritas staff that not much had happened on their specific project since the year before. This person continued by saying if nothing happened in the next twelve months, she would not be back. This sounded threatening, yet I believe it was expressed within the bounds of a positive relationship; a relationship that could withstand a challenge, a relationship where genuine listening was valued and within a forum where people were safe to express themselves honestly. In fact, when I asked one of my Caritas research participants after the meeting what she thought of that comment, she expressed reassurance that it was made in good faith; "that comment would not have been expressed publicly like this, a year ago" (Participant Two, Caritas).

4. Committing as an organisation

Participants believed a personal willingness to be challenged needed to extend to willingness for the organisation to make commitments.

"When I go, I go as Caritas. I had to deconstruct that role of being the programmes guy. I'm just alongside my colleagues and representing Caritas and trying to enhance the relationship" (Participant One, Caritas).

"That means those questions they might want to throw on the table, they are challenges to the institution that need to be aired and discussed but not taken personally. For example, we asked Parihaka to make a commitment to hosting a hui nine months out but we were not in a position to answer their question about what resource or expertise we would have at our end. That was a challenge to our institution…I see it as exactly the same as if we were going to Ministry of Foreign Affairs (MFAT) and wanting to reposition supplies in Tonga but couldn't commit to having a humanitarian officer on the ground" *(Participant Two, Caritas).*

From the partners' perspective, how Caritas treated its Maori staff members was an indication of how committed Caritas was to *tangata whenua* relationships, along with the time and money invested in the *Kaihāpai Māori* role.

Participant Four, Te Rūnanga, also expressed how the organisational trust is growing but could be improved.

> "Our relationships with individuals is excellent. Having regular staff to deal with has been the success of on-going relationship and trust between our two communities. We have invested a lot of time getting to know them. And they have invested time getting to know us. If one of them leaves, there is a risk we will feel uncomfortable. You can't take for granted the resourcing and relationships."

5. Understanding time

The notion of time, from a Māori perspective, needs to be embraced for trust to be forthcoming in relationships. For my participants, understanding time through a Māori lens means stepping out of Pakeha expectations about time frames - with the urge to solve problems or produce something - and come to grips with the concept of *he wā* (a time) and *te wā* (the time*).*

Participant One, Caritas, reflected on the importance of recognising the difference between these two different meanings of time;

> "We kept looking for the time when the project was going to happen. We thought the relationship should produce a project and it should do it within our timeframe. But we got the message back, 'Don't worry about the programme. It will come. There is always 'a time' (*he wa*) for programmes but if you keep going after it, it won't happen. If you trust there will be 'the right time' (*te wa*) then it will work. What we are after is a relationship with you."

This same participant described how, in relation to organising the national *Hui*, respect for this Indigenous concept time can be an indicator of trust;

> "At our last *Hui* at Parihaka, they said te wā, meaning, it is time for the Caritas *Hui* to be held at Parihaka. This was an indicator that the relationship had reached a point where they could say 'yes, we will facilitate and host your *Hui*.' "

Time is also connected to space for Māori *(he wā he wāhi)* and they need to be respected together. Participant Three, Te Runanga, related the two concepts to interacting in a space in which they are comfortable (i.e on marae).

> *"He wā, he wāhi.* Are you giving me time and space? As opposed to a one hour meeting in an office."

This significance of space to trusting relationships is another indicator that I discuss next.

6. Interacting in the marae setting

The significance of meeting on the *marae* as opposed to an office was perceived as hugely important for deepening trust. All participants spoke of benefits. For *tangata whenua*, engaging on *marae* encouraged increased cultural competency, while for Caritas it had the added value of heightened awareness.

> "It is like I use another part of my brain when I am in a *marae* setting.I do lot more listening than I do in the office. I'm not just listening with my ears. I am aware of body language. In the office, we are all just facing ourcomputers and not conscious of the 'higher frequencies'" (Participant Two, Caritas).

> "We make the effort and we go to them. Into their territory as the *manuhiri*. It puts them in the driver's seat and us in the back seat. We put ourselves on their turf, on their terms, under their *kaupapa"* (Participant One, Caritas).

> "The willingness to stay on *marae*, and learn and live together builds trust. There is a reciprocal responsibility and certain *tikanga* and *whakawhanaungatanga* you have to adhere to. It breaks down barriers, removes the misperceptions about what *marae* living is about" (Participant Five, Parihaka).

> "On the *marae*, you can see everyone in different spaces and that's how we measure and see whether we can trust you or not" (Participant Four, Te Rūnanga).

7. Interacting in the in-between spaces

Participants spoke of the importance of interacting comfortably together in the in-between spaces; the non-work spaces, as an important reflection of trust. They believed being willing to get to know each other and connect on a personal level in these spaces allowed for deepening relationships.

> "Trust can be measured by how well and how often you can be together in the in-between spaces. Where you are off duty and can be yourself. Like being on the road together. Or doing the dishes. It's a time to connect on a personal level (Participant One, Caritas).

> "We look at how you fit, at the table, in the kitchen, at the sink" (Participant Three, Te Rūnanga).

"Shared interests can be discovered over the dishes" (Participant Five, Parihaka).

At the *Hui a tau,* I also observed Caritas and *tangata whenua* partners connecting in the in-between spaces. For example,

Doing the dishes

There was no roster for doing the dishes. After people finished eating, a few would start clearing the plates and another couple would come alongside and start doing the dishes. Washers and driers would rotate, in relay fashion, until the job was done. With 'all hands on deck' the job of cleaning up was completed smoothly and it was also an opportunity to continue chatting, meet someone new, share interests and hear some more about life at Parihaka.

Going for a walk around the three maraes of Parihaka

On the Saturday morning, the key Parihaka facilitator guided all those who were interested on a walk around the Parihaka village. We walked, side by side, Board members talking to *tangata whenua* partners, staff of all organisations mingling and children running ahead. As we walked, we heard the stories relating to historic landmarks and hopes and aspirations for a future sustainable community. I observed people relaxed, eager to listen and chat and connect in a different space than the meeting hall.

Sharing *kai*

With seven meal times across the weekend, shared *kai* was clearly an important part of the *Hui*. These were breaks to nourish and re-fuel but more than that they were opportunities to connect outside the more formal sessions inside the *wharenui*. Food was laid out in buffet style and everyone dished their own and sat together, in no particular assigned seating at long tables. I observed these sessions as full of relaxed conversation and laughter. Māori, Pakeha, Caritas, *tangata whenua*, old, young, managers and Board members, everyone sitting together, mixing, mingling and sharing.

8.   Genuine listening

For participants, this measure of trust lay in being willing to listen with no agenda to push and recognising that alongside listening well, goes taking time to think and talk and discuss. From a Caritas perspective this meant;

"Coming with a genuine approach to listening and learning. Coming with no agenda to push regarding religion has helped make a difference to the level of trust that has been established… We asked them, what kind of relationship would you like to have with us? Then gave them time to think and talk about that" *(*Participant One, Caritas).

From a *tangata whenua* perspective, there is a strong feeling that Caritas come and listen, they don't come to dictate, and this helps establish trust.

"She came and listened. It sounds simple but takes time. If they can listen and show wilingness to listen then cross commuciation can start. For a lot of people they will listen but disengage and won't acknowledge" (Participant Four, Te Rūnanga).

9. Contributing funds

Participants all spoke of funding as a resource that can be brought to the table. *Tangata whenua* participants revealed different opinions about how *much* it impacted on relationships but they all perceived Caritas as a funding body and therefore saw funds as an indicator for trust.

"I understand aid goes out to lots of international countries but maybe more resource needs to go into this relationship-building between our own nations in New Zealand" (Participant Three, Te Rūnanga).

"Resources and funding indicate what they are up to. Funding is a measure of how well they treat us. How do they resource? They don't have many Māori in there*"* (Participant Four, Te Rūnanga).

"For us, it is more important to have a good trusting relationship with Caritas. Whether funding support comes with that is a side bonus. It is an extra to the relationship" (Participant Five, Parihaka).

To substantiate these findings, I went back to the Project Criteria for the Caritas *Tangata Whenua* Fund. I was seeking clarification as to how much funding support Caritas offers *tangata whenua* partners. This document states that Caritas will consider projects where the Caritas contribution is up to $5000 per annum. It also states that Caritas "*seeks partners who wish to have an ongoing relationship with Caritas, and to contribute to work which builds links with indigenous partners and work overseas." (Caritas, 2016b)* This suggests that while the funding is not much, the organisation values relationship building and a collaborative approach to building networks and connections for *tangata whenua*.

From a Caritas perspective, accepting that the organisation is seen as a funding body is significant. As Participant Two notes below, the relationships have grown out of Caritas being able to contribute financially.

> "The relationship with Parihaka has hugely grown out of us being able to contribute financially and in other ways to the playground project. It has hugely grown with Te Rūnanga, through the generosity of the koha. It is not much, but in comparison to others that give nothing, it is generous.

> "In terms of what we bring to a relationship, our *tangata whenua* don't see us as a cash cow. But of course resource is one of the things we bring. If we go empty-handed saying, 'we like what you do, we believe in what you do' then we look insincere considering we are an aid organisaton and we distribute money to lots of other places" (Participant Two, Caritas).

10. Contributing new knowledge and connections

> "A good trusting relationship can help us connect with moral and social issues, on a local, regional and global scale. Through networking, we come to understand humanitarian issues that are going on, the need for social action, peace and advocacy. The relationships can help us collaborate with other groups around these issues, in other parts of the world. It is massive" (Participant Five, Parihaka).

Participants recognised trusting relationships as ones that could give and receive in mutually beneficial ways. All spoke of other advantages besides funds that were contributed through the relationship. For example, seeing *Hui* as a chance for building stronger networks via sharing and participating and making space for this opportunity to learn and connect.

> "We have so much to share in these forums and to help each other forward. They are facilitated by Caritas so we would not have this opportunity to link up with these communities if we weren't part of this process" (Participant Five, Parihaka).

> "It's not just funding for the *papa takaro* (playground), this is about holding hands on humanitarian rights on a global issue which is way bigger than me and Parihaka" (Participant One, Caritas).

> "We have been able to help them build a relationship with NATSICC (the Aboriginal equivalent to Te Rūnanga in Australia)" (Participant Two, Caritas).

The Caritas Strategic Goals Summary 2013-2017 also reflected these participant opinions on the value of making new connections. Target 2 of the Goals states;

"Make connections between three Indigenous communities… to strengthen our response and deepen our understanding" (Caritas, 2016c).

Making "partnership links" between local and international Indigenous communities is also stated as an indicator of success in this document (Caritas, 2016c).

4.4 HOW TO USE MONITORING AND EVALUATION TO REFLECT TRUST

The insights expressed above highlight what people most value and what behaviours are deemed to be important in improving trust. The challenge of capturing indicators for trust in this way – particularly the observable behaviours that were deemed to express values – enabled all participants to consider what could be measured and reflect on how levels of trust in relationships might influence programme outcomes. I suggest that these ten signs of trust become a focus for Caritas in monitoring and evaluating its relationships with *tangata whenua* partners. Before I conclude with recommendations to this end, I present some final findings regarding the ways to carry out this important work.

I asked my participants in what ways they might consider monitoring and evaluating these signs of trust. They were searching for ways that would frame the evaluation in an Indigenous way of viewing the world (Hopson, 2009, p. 431). They saw their annual *Hui ā tau,* as an appropriate opportunity. This *Hui* is a public forum with Caritas staff, Māori partners and some members of the Caritas Board in attendance.

> "I would very much like to move towards our *Hui ā tau* being a kind of face to face reporting and evaluation" (Participant One, Caritas).

Caritas participants suggested this method encouraged more talking 'face to face' in an authentic, accountable way; ensured partners felt safe to air their grievances and encouraged mutual, self-reflective learning. While the focus would be reflecting on and monitoring the ten signs of trust, enabling the Hui, was perceived as a trust-building exercise in itself.

> "Part of the trust is when we can provide a forum for them to discuss wider issues… A public forum is more effective than people just facing up to Caritas in private and saying they did what they did. If they are saying to a public forum with all the people in relationship with us; 'this is what we intended to do and this is what worked and what didn't', it helps the learning between our relationships and beyond… If there were

issues, it is an effective way to hold each other to account including us. Caritas is held to account as well" (Participant Two, Caritas).

"We have a chance to talk to each other face to face and decide together what we'll feedback and do informally. It is all narrative and telling the story but making sure we stick to the story" (Participant One, Caritas).

"It gives Caritas time to reflect on 'is this working?' and can be a blueprint for working with other groups" (Participant Three, Te Rūnanga).

"But at same time we have to keep people focused that it is a Caritas *Hui* and one of the things that needs to be discussed is how Caritas is working with them and what Caritas should be doing to improve. What the relationship needs to look like and how it needs to grow" (Participant Two, Caritas).

Participant Five, Parihaka, also commented that without a clear purpose and a focused outcome for evaluation, the *Hui* would lose direction.

"It needs to be constructive. Knowing what is our combined purpose and then what we do with it…helps us strive forward. For us, it's about living the legacy and determining what we are leaving for our children to inherit."

These sentiments echoed the intentions expressed in the Caritas Strategic Goals Summary 2013-2017, which includes under Goal 3, the hosting of a Caritas *Tangata Whenua Hui* as an action point: "Continue to build this *Hui* into our processes as a form of reporting/evaluating projects/partnerships"(Caritas, 2016c).

In the following section, I explore the implications and relevance of these findings for Caritas and the ongoing relationship with its *tangata whenua* partners.

5. CONCLUSION AND RECOMMENDATIONS

*"At Caritas, we have been gently but resolutely challenged by our tangata whenua partners to lay aside our own agendas and timeframes, and to start tuning in to theirs. This is making a profound impact on us as individuals, on the culture of our organisation, and on the way we plan and monitor our development programmes in the Pacific and beyond" (*Caritas, Participant One).

5.1 INTRODUCTION

In this study I have explored how Caritas can use monitoring and evaluation to enquire into its relationships with *tangata whenua* partners. My rationale was motivated by Caritas' desire to approach M&E from a Māori world view in order to deepen self awareness and improve these relationships. Using a qualitative methodology, I conducted in-depth interviews to explore what trust looks like from both a Caritas and *tangata whenua* perspective. To add nuance to this exploration, I also observed participants at an annual conference for signs of trust and examined official Caritas documents for trust-building references. In this final chapter, I cover three areas to conclude this report. First, I present a framework that emerged from the interview findings. Essentially, it is a framework for reflecting trust between Pākehā organisations and *tangata whenua*. Second, I consider more widely how the findings connect to the literature review. Finally, I discuss, in the context of the research aim, the implications and relevance of these findings for Caritas and its ongoing relationship with *tangata whenua* partners.

5.2 MERGING FINDINGS AND LITERATURE:
A FRAMEWORK FOR MONITORING AND EVALUATING TRUST IN CARITAS' RELATIONSHIPS WITH TANGATA WHENUA

Based on the findings of my research, a framework for trust has emerged. This framework helps answer my sub question;

• How do Caritas Aotearoa and the *tangata whenua* partners define trust in terms of their relationship with each other?

Covering a range of acceptance for what defines cultural competence, the participants in my study expressed varied perspectives, validating the theory that

there is no right way of looking at things (LaFrance & Nichols, 2010). I was honoured to have their opinions shared with me.

This framework puts trust quite clearly at the centre. In doing so, it reflects Kirkhart's insights that "cultural considerations do not reside at the margins of evaluation practice; they are squarely in the center" (Kirkhart, 2010, p. 411). As a tool for shared learning, it offers Caritas a way to engage with its *tangata whenua* partners and ensures M&E is a process that is done inclusively and in partnership.

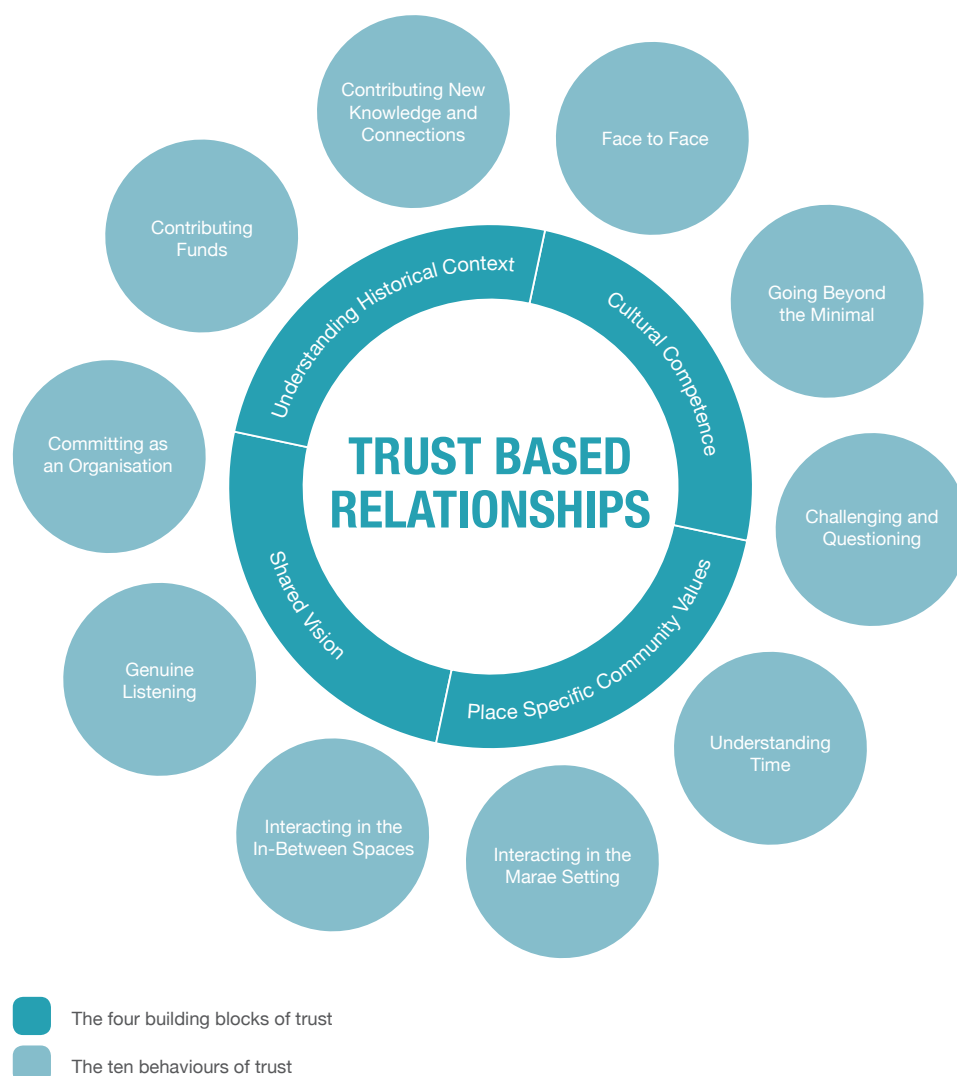## A framework for monitoring and evaluating trust in Caritas' relationships with tangata whenua

Figure 1: A framework for monitoring and evaluating trust in Caritas' relationships with *tangata whenua*

The concept of trust-based relationships is at the heart of the framework. This central tenet is encircled by an inner core representing the foundational building blocks of trust as described in my findings. These are; historical context, cultural competence, place specific community values and shared vision. These multi-dimensional principles are the inner core because they need to be understood first, in order to form genuine relationships (LaFrance, 2004). They reflect the "first level of trust" (Christopher et al., 2008, p. 1400) and a respect for Indigenous ways of knowing (LaFrance & Nichols, 2010; Wehipeihana, 2013).

Beyond this inner core, ten indicators, or signs of trust radiate around the central idea of trust-based relationships. These are, in no particular order:

1. *Kanohi ki te konohi (*face to face)
2. Going beyond the minimally required
3. Challenging and questioning
4. Understanding time
5. Interacting in the marae setting
6. Interacting in the in-between spaces
7. Listening genuinely
8. Committing as an organisation
9. Contributing funds
10. Contributing new knowledge and connections

This emergent framework consists of features of engagement in the relationship today. It reveals for Caritas that evaluation with *tangata whenua* demands a fresh perspective, a collaborative partnership approach and a renewed emphasis on the importance of valuing relationships. It echoes the ideas around indicators and frameworks sourced in my literature review. For instance, La France, reflecting on her work with Native Amercian Indians, believed that building an Indigenous evaluaton framework enabled mutual understanding and relationship;

> "In a country that values mobility, competitiveness and progress, the Indian values for preservation and community seem out of place. Yet it is these more conservative values that underlie many of the projects that are subject to outside evaluations. Failure to understand such values... results in evaluations that fail to contribute to tribal goals and program expectations" (LaFrance, 2004, pp. 42-44).

Meg Holden also argues for revealing indicators that are culturally specific, capture diverse systems of beliefs, and allow space for values that are seen as important

yet almost never quantified (2009, pp. 441-443). While simplifying complexity can be dangerous (Taylor, 2008) this framework helps to unpack the components of trust into identifiable, measurable signs. These are signs that Caritas and the *tangata whenua* partners can together use to monitor how well they doing in developing their relationships. "Relationships cultivated and honoured are part of strong evaluation" (Kirkhart, 2010, pp. 407-409).

Similar to other Māori centred approaches I researched, this framework honours cultural perspectives (Wehipeihana, 2013). Co-constructing the framework demanded engaging with Māori ways of being and knowing (Torrie et al., 2015, p. 53). It demanded taking the time to move with the way people want to share, in their own way (Wehipeihana & Grootveld, 2016). For Caritas, cross cultural collaboration will be more meaningful when concepts that impact on trust are identified and addressed. Working with these concepts can help promote dialogue and demonstrate sensitivity towards perspectives of the "other" (Burnette & Sanders, 2014; Louis, 2007; Torrie et al., 2015). The process is a journey, a fluid process with no single point of entry (Kirkhart, 2010, p. 407).

5.3 CONNECTING THE FINDINGS TO THE RESEARCH AIM: RECOMMENDATIONS AND IMPLICATIONS

I turn now to suggest some recommendations and implications in view of connecting these findings to the wider research aim; how can monitoring and evaluation be done in ways that reflect trust–based relationships with *tangata whenua*?

Caritas could use this framework with its ten signs of trust as a practical tool for monitoring and evaluating trust in its *tangata whenua* relationships. Some of the signs might be easier to monitor and measure than others, and this is something the organisation would need to consider. Caritas could use the annual *Hui ā tau* as a forum for formally evaluating the ten signs of trust. Monitoring and measuring the signs while looking for trends in improvement year on year, would give a clear purpose to the *Hui.* It would be something "constructive to strive for" as Participant Five from Parihaka said.

By implication, this commitment to evaluating trust at the *Hui ā tau* would demonstrate an openness and respect for shared learning. It would exhibit the

55

willingness of Caritas to navigate a Māori context where evaluation belongs to the community. This might help ensure local control and capacity building (LaFrance & Nichols, 2010). Taking on board the political and cultural aspects of *tangata whenua* and embracing the complex power relations that go with that might be messy and dynamic but are critical to achieving meaningful cross-cultural evaluation (Curry, 2003; Guijt, 2010). Indeed, it would demonstrate Caritas is searching for answers to those critical questions; Whose story? whose place? whose benefit? (Underhill-Sem & Lewis, 2008) and: Who counts reality? (Estrella & Gaventa, 1998).

As I observed, Caritas and its partners have already embarked on using their annual conference as a place to strengthen and evaluate their relationships. I experienced the *Hui ā tau* as a time for face to face discussion, for challenging talks, for sharing and listening, for walking and sleeping side by side. These all signalled relationship building and a prioritising of the contextual, relationship space also known as the "*Va*". It was a bonding process that produced social capital, "that is the intangible benefit of closeness and cooperation, which is trust" (Kerr, 2013, p. 81). Some of the hard talks and challenges could only come because there was trust and signalled the effort it takes to build trust and maintain it (Christopher et al., 2008). As Gujit insightfully explains (2010, p. 1032), monitoring is not just collecting information but allowing the learning to happen through a process of dialogue and reflection.

Ongoing, informal methods for monitoring these trust-based relationships are also recommended, beyond the annual, one-off conference. For example, Caritas could track how well the ten signs of trust are reflected in their policy documents and strategic plans related to *tangata whenua*. The organisation might also wish to reflect on the framework at its *tangata whenua* workstream meetings. As Participant One from Caritas noted, these monthly Caritas-based meetings are "grunty and tricky" so could perhaps become more purposeful and structured if this framework was adopted as a learning tool.

5.4 CONCLUDING REMARKS

Building strong relationships matters. They do count in order to achieve development that enables shared learning, empowerment and self-determination. Monitoring should not just be about tracking progress and proving what development is occurring. It needs to try and *improve* the practice of development itself and this starts with paying attention to relationships. PM&E has given development practitioners the space to ask more questions, not simply devise more indicators. Yet this requires trust and dialogue and it is not easy. As Engel et al, (2003) note, it is about connecting people and ideas and transforming information into learning;

> "There is no single set of tools that guarantees learning. Indeed, many different ones can be used if the principles governing successful learning are taken into account. These include mutual respect, inclusive thinking, a readiness to understand other peoples' perspectives, and a willingness to take criticism seriously" (2003, p. 6).

Finally, echoing the quote from Buddha I referenced at the beginning of this report, we are all in this together. Our relationship to each other matters in order to determine a way forward. It might be messy and organic but we need to respect each other's different ways of knowing and living if we are to connect in an authentic relationship.

This study has contributed some additonal elements to the body of knowledge concerning Indigenous perspectives on M&E. It has been an opportunity to further explore and reflect on the dimensions of trust from a *tangata whenua* perspective. The result is a framework for Caritas to use to measure and monitor trust. While these findings are specific to Caritas and its work with *tangata whenua*, they provide a platform to apply or adapt for different contexts. Significantly, they offer an opportunity for Caritas to ask more questions, open up the dialogue with its Māori partners and invite a more collaborative approach towards doing development.

APPENDIX ONE: LOW RISK NOTIFICATION

Low Risk Application Letter

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND

Date: 07 March 2016

Dear Gretchen Leuthart

Re: Ethics Notification - **4000015633** - **Making Relationships Count.**
How a faith-based organisation monitors relationships of trust with
Tangata Whenua groups.
A case study with Caritas New Zealand.

Thank you for your notification which you have assessed as Low Risk.

Your project has been recorded in our system which is reported in the Annual Report of the Massey University Human Ethics Committee.

The low risk notification for this project is valid for a maximum of three years.

If situations subsequently occur which cause you to reconsider your ethical analysis, please go to http://rims.massey.ac.nz and register the changes in order that they be assessed as safe to proceed.

Please note that travel undertaken by students must be approved by the supervisor and the relevant Pro Vice-Chancellor and be in accordance with the Policy and Procedures for Course-Related Student Travel
Overseas. In addition, the supervisor must advise the University's Insurance Officer.

A reminder to include the following statement on all public documents:
"This project has been evaluated by peer review and judged to be low risk. Consequently, it has not been reviewed by one of the University's Human Ethics Committees. The researcher(s) named in this document are responsible for the ethical conduct of this research.

1 June 2016

Kia ora Murray

Thank you very much for agreeing to participate in my research project.
This letter is to give you a fuller picture of what my study is about, who I am
interviewing and the nature and process of the interviews.

This project completes my Masters in International Development which I am
undertaking through Massey University. The topic of my research is;

'Making Relationships Count: How a faith-based organisation monitors
relationships of trust with Tangata whenua groups.' It is a case study with Caritas
Aotearoa New Zealand.

I arrived at this topic thanks to my association and work involvement with Caritas. I
have been a volunteer for the organisation for several years, helping with media
and advocacy work. The parallel experience of studying development theory and
seeing the practicalities of a social justice agency in action, have been very
rewarding. I was inspired to undertake a research project that could be applied to
Caritas's own learning journey. There are three critical issues to highlight here;

First, I am very grateful to Lisa Beech and the programmes team that they agreed
to this case study exploration because it is an area they would like to further
understand and apply new thinking to.
Second, I acknowledge that it is purely thanks to being a Caritas team member that
I have been given the privilege of undertaking research with their Tangata whenua
work programme and partnerships with Māori communities.
Third, I am also very aware that Taneora Ryall, as *Kaihāpai Māori* for Caritas, plays
a pivotal role in making this project a reality. Taneora will provide cultural advice,
support and insight to help guide me as a Pākehā researcher volunteering with a
Catholic organisation.

In terms of my research aim, I am exploring how Caritas can use monitoring and
evaluation to develop trust-based relationships with *tangata whenua* and thereby

continue to improve their work. In the first step of this process, I have carried out a literature review to review indigenous perspectives on monitoring and evaluation (M&E) and specifically on relationships and trust. Within this review, I have been looking for existing frameworks or indicators for monitoring and evaluating trust – based relationships.

In the second step, I intend to carry out qualitative interviews to help answer two further questions:

- How do Parihaka and Te Rūnanga o te Hāhi Katorika define trust in terms of their relationship with Caritas Aotearoa New Zealand?
- How does Caritas define trust in terms of its relationships with indigenous partners?

As this is a case study for Caritas, it was appropriate that Lisa advised me on selecting participants to interview. I intend to interview Charissa Waerea from Parihaka as well as Maru and Sr Tui from Te Rūnanga o te Hāhi Katorika, along with Lisa Beech and yourself, representing Caritas Aotearoa New Zealand.

The Interview

8 June, 930am, Caritas, Wellington

This will be a semi structured interview lasting about one hour. I intend to follow a set of specific questions (see attached) broadly related to my research questions. However, I'm hoping for discussion and insights into what complex, dynamic relationships look like in a cross-cultural context. I intend to be flexible in terms of the order of questions and keen for dialogue and engagement rather than just simple answers to my questions.

If there are any questions you don't wish to answer, you have a right to decline to answer particular questions or withdraw completely (with no negative consequences as a result).

Your verbal consent to participate allows for the disclosure of identity in my report. Due to the nature of this research as a case study with Caritas, and their involvement in helping select my participants, I cannot guarantee your anonymity. However, if you would like to remain anonymous, I will take care to disguise your identity through a pseudonym.

I will be recording the interview on an iphone. This is to ensure I can capture your answers fully and not feel the need to write everything down when we are talking. You can request to have the recorder turned off at any time.

In terms of publication of the research, as this research fulfills a 60-credit report and not a 120-credit Masters Thesis, it will go into the Massey Library and therefore is not publicly accessible. The report will be embargoed, that is restricted to viewing by only three people; my supervisor, an examiner and a moderator. It cannot be disclosed without approval from Caritas to release it further. Nevertheless, I intend to share the results of my research with you, the other participants and Caritas. Any further sharing of my research will happen only if all participants agree.

Murray, I hope this gives you a clear understanding of my research topic and what you can expect from the interview. I look forward to talking with you along side Taneora next Wednesday 8 June.

Please see questions attached.

Nga mihi

Gretchen Leuthart

To give you a broad context of my research topic, please see my Research Aim and Main Question below:

Research Aim	To explore how Caritas Aotearoa can use monitoring and evaluation to develop trust-based relationships with Tangata whenua
Research Question	How can Monitoring and Evaluation be done in ways that reflect trust –based relationships with Indigenous partners?
Research sub question	How does the Parihaka community define trust in terms of their relationship with Caritas Aotearoa?

Questions for this interview:

What behaviours/ practices/ values do you look for in a trusting relationship between your organisation and Caritas?

How does Parihaka define trust? What does trust mean for you in terms of your relationship with Caritas?

What would deepen trust -based relationships between two organisations?

What parts of your relationship with Caritas are due to the individuals? And what is the institutional relationship?

Caritas believes that building their relationship with you is as important as just funding projects. Why do you think this should be a priority?

How important is the exchange of resource and/ or funding to the relationship?

Caritas needs to have an evaluation/ reporting process because of accountability with donated funds (including grants, travel, staff time and koha etc). What does an ideal monitoring and evaluation framework look like to you? (in the context of Trust relationships in Indigenous communities)

The purpose of evaluation is also to understand how each of us is learning from the relationship. For what purpose would you like to see evaluations undertaken?

How could you do it?
In other words, What would evaluation /reporting look like for Parihaka?

What processes / discussions/ take place at Parihaka to decide on what direction to develop the relationship with Caritas?

How does setting and place influence the relationship? i.e. What is the impact of marae based interactions versus office –based?

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