

A Complexity-Based Framework for Evaluating Social Change Initiatives in the Development Context

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Abstract

This paper presents a comprehensive framework for evaluating communication for development (C4D) initiatives¹. It draws on creative and innovative evaluation approaches, alternative perspectives on development, and significant, rigorous research by the authors. The framework comprises seven inter-related components: participatory, holistic, complex, critical, emergent, realistic and learning-based. This new combination of components is designed to contribute to the aim of sustainable social change through C4D and to improving the quality and rigour of evaluations of C4D initiatives. The framework draws on a range of complementary research and evaluation approaches and methodologies, including systems and complexity-based approaches. It advocates a mixed methods approach which includes a focus on power, gender and other differences and social norms; continuous embedded evaluation; and holistic forms of evaluation capacity development at all levels. While there are many challenges in successfully implementing this framework, there is a need to take a long-term view of the value of this approach, which can be cost effective when its many benefits are considered.

Rationale for the framework

The project planning cycle is currently dominant in development. The linear, logical framework approach promoted by many development institutions, along with results-based management, present an accountability approach to development and its evaluation that is underpinned by ideas of pre-planning, and pre-determining what successful outcomes will look like. In this approach, the outcomes of complex interventions are often reduced to simple, cause-effect processes and the categorization of things, including people (Eyben, 2011). In contrast, participatory approaches, complexity theories and whole systems approaches understand social change as unpredictable, unknowable in advance, emergent, something to learn from and adapt to. The former approaches prioritize categorization of abstract concepts, control and accountability; the latter prioritize relationships, openness, innovation and flexibility. The former are mainstream, considered rigorous, and largely based on standardized methods; the latter are alternative, considered (by proponents of the former) to lack rigour and based on a range of approaches, methodologies and methods selected according to each initiative and its context. However, while there are some clear divisions between these two paradigms, our framework advocates moving beyond such strict dichotomies, given its open, self-evolving, adaptive approach.

These issues are important to recognise and address because participation and ideas around long-term change are being overcome by an ascendance of accountancy and linear planning models (Eyben, 2011; Mebrahtu et al., 2007). We believe that evaluation can play a key role in ensuring that we don't ignore the lessons of the past in favour of mechanistic approaches to evaluation, that technocratic

¹ This paper is based on the forthcoming book by June Lennie and Jo Tacchi *Evaluating Communication for Development: A Framework for Social Change*, to be published in December 2012.

approaches do not overwhelm participatory approaches and the involvement of those on the ground, and that innovative and creative approaches to evaluation that are designed for learning rather than accounting are promoted.

Introduction to the framework and C4D

The framework for evaluating communication for development (C4D) outlined in this paper fits most comfortably within a holistic approach to development based on systems and complexity thinking. It takes a participatory, flexible, mixed methods approach to research and evaluation, incorporates action learning and a critical, realistic, approach to social change and evaluation, and advocates a focus on power, gender and social norms. The framework emphasizes people, relationships and processes, and principles such as inclusion, open communication, trust and continuous learning.

We believe that this framework is a valuable means of understanding and addressing the complex social change issues that C4D contributes to. C4D is defined as:

the use of communication processes, techniques and media to help people toward a full awareness of their situation and their options for change, to resolve conflicts, to work towards consensus, to help people plan actions for change and sustainable development, to help people acquire the knowledge and skills they need to improve their condition and that of society, and to improve the effectiveness of institutions (Fraser & Restrepo-Estrada, 1998, p.63)

C4D encompasses all forms and modes of communication, including community radio and entertainment-education programs focused on social change and development, community-based information and communication technology (ICT) initiatives, community dialogue, and combinations of new and traditional media that are used to support development activities. However, C4D is essentially about people and relationships rather than technologies. We propose that the framework can help to reinforce the case for effective two-way communication and dialogue as central and vital components of participatory forms of development and evaluation that seek positive social change.

Origins of the framework

The framework grows out of research we have been undertaking together and separately, for over 15 years, and our mutual interest in issues of participatory research and evaluation, and capacity development. Research and consulting projects that we drew on to develop the framework include:

- ***The development of Ethnographic Action Research (EAR)***, which was designed to help people understand, evaluate and continually improve their C4D initiatives (Slater et al., 2002). EAR takes a holistic approach through the concept of communicative ecologies, which enables a focus on the actual use of, and interaction with, media and ICT in the wider context of people's lives and social and cultural structures. This emphasises the complexity of local communicative environments, and people's diverse communicative opportunities and experiences (see Tacchi et al., 2007).
- ***The LEARNERS project***, conducted from 2001 – 2004 in collaboration with two communities in rural Queensland and several project partners (see Lennie et al, 2004; Lennie, 2005). This project demonstrated the value of participatory action research (PAR) and participatory evaluation and the use of systems approaches for understanding and addressing complex community development issues. It identified critical success strategies for conducting and evaluating PAR, community capacity building and community C&IT projects, and highlighted complex barriers to community participation and empowerment.
- ***The Assessing Communication for Social Change (AC4SC) project***, conducted from 2007 – 2011 in collaboration with the NGO Equal Access Nepal (EAN), which developed a participatory methodology and M&E systems and processes to assess the impacts of C4D radio programs made

by EAN. This PAR project provided significant learnings about evaluation capacity development (ECD) in complex and challenging development contexts (see Lennie et al., 2012), and resulted in a toolkit for evaluating C4D initiatives (Lennie et al., 2011) which is currently being trialled in Niger, Africa.

- **The development of a Resource Pack for researching, monitoring and evaluating C4D** for use by the UN and its partners. This project included a wide-ranging literature review and consultations with an Expert Panel and C4D Focal Points or M&E specialists in various UN agencies (see Lennie & Tacchi, 2011a and Lennie & Tacchi, 2011b). These consultations included the development of a comprehensive set of principles for effective, appropriate and sustainable evaluation of C4D and an initial framework that incorporated these principles.

Overview of the framework

The framework should be seen as a flexible, over-arching framework for evaluating C4D and other complex development initiatives that are focused on achieving positive and sustainable social change in areas such as poverty reduction, gender equality, disease prevention and discrimination. It is seen as theoretically and methodologically rigorous, practically accessible, and highly consistent with the values and principles of C4D. The emphasis is on processes, principles and values (such as inclusion, open communication, trust and continuous learning), and less on achieving specific measurable results or outcomes. As Patton (2011, p.246) points out, the outcome and accountability focus underpinned by results-driven approaches downgrade or ignore these:

But for values-driven social change activists and innovators *how* outcomes are attained is at least as important as, if not more, important than the outcomes themselves. Process matters. ... given the uncertainties of complex interventions and interactions ... values can become the anchor, the *only* knowable in an otherwise uncertain, unpredictable, uncontrollable, and complex world.

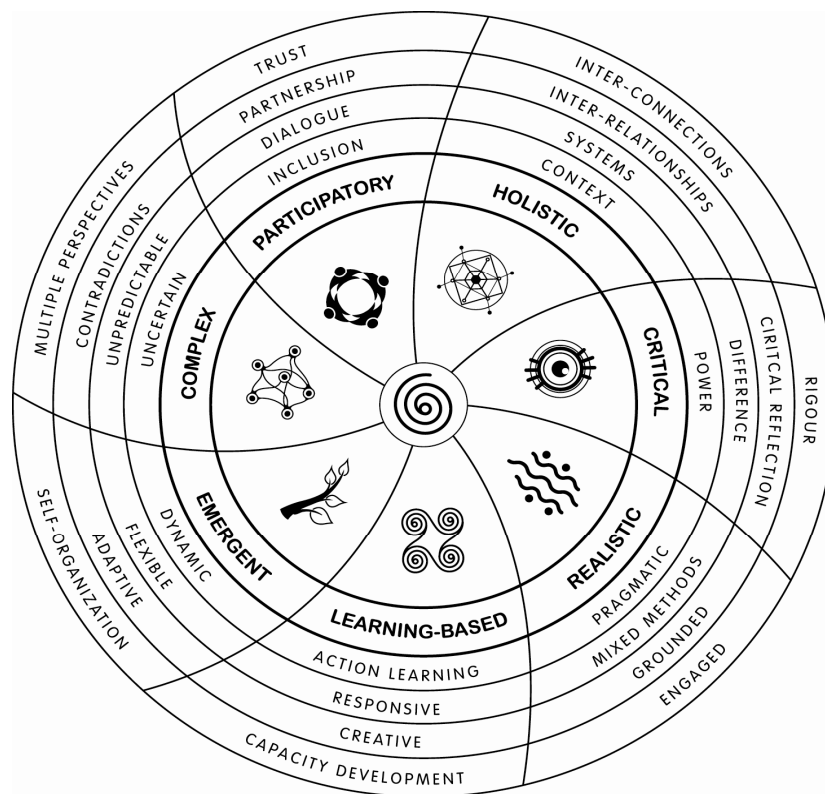


Figure 1: Key components and concepts in the framework for evaluating C4D

The framework comprises seven inter-related components and a number of key concepts and principles, as shown in Figure 1. We now describe each of these components in more detail.

Component 1: Participatory

The concept of participation is a fundamental element of C4D. A participatory approach is therefore a key component of our framework. Participatory forms of research and evaluation are widely acknowledged as particularly effective and appropriate in C4D. Their benefits include: the ongoing development and improvement of initiatives and policies in ways that better meet community needs and aspirations; increased evaluation capacities; greater utilisation of evaluation findings and learnings; and empowerment of participants. Both the UN Focal Points and Expert Panel in our UN consultations considered participatory approaches to evaluation very important for C4D.

In the approach taken by the framework, evaluation is conducted in partnership with community members, stakeholders and others, using processes that are culturally and socially appropriate, creative, and based on mutual trust, openness and transparency. This approach respects, legitimises, contextualises and draws on the knowledge and experience of local participants as well as relevant experts and outsiders. It is as inclusive as possible of a diversity of groups. The process aims to continuously and actively engage people in all aspects and stages of the evaluation through two-way communication, dialogue, feedback and mutual learning. It includes an action component to continuously develop and improve C4D and evaluation processes. A participatory monitoring and evaluation (PM&E) approach and methodologies such as EAR are seen as important to developing effective, innovative and sustainable C4D.

For example, the PAR process used in AC4SC included regular meetings, workshops and field-based activities that were effective in strengthening evaluation capacities within EAN and engaging community participants and other stakeholders in the evaluation process. Among other outcomes, this resulted in improved relationships between M&E and program development staff and a greater appreciation within EAN of the benefits of continuous participatory research and evaluation.

While participatory approaches to evaluation are particularly well-suited to C4D, they may appear to cost more in time and resources than non-participatory approaches and the political will to invest in these approaches is often weak or absent (Parks et al., 2005, p.13). There are also issues with the dominance of quantitative approaches and the entrenched use of standard tools such as the logframe. In this context, it is important to take a long-term view of the benefits of using well-planned and rigorously implemented participatory research and evaluation approaches.

Component 2: Holistic

A holistic perspective based on systems thinking, complexity theory and action research is increasingly seen as important to better understanding and addressing complex development problems (Burns, 2007; Ramalingam et al., 2008; Wadsworth, 2010). Some of the characteristics of complexity theory and systems thinking have fundamental similarities to PM&E:

1. A shift in focus to interrelationships and processes rather than snapshots, seriously challenging dominant linear explanations of systemic phenomena.
2. An understanding of development as complex, emergent and transformative.
3. A shift to the bigger picture and interconnections, with much focus on boundaries and the values they reflect. (Byrne, 2008, p.9, based on Williams & Iman, 2006).

In this approach, evaluation is based on an understanding of the wider social, cultural, economic, technological, institutional and organisational systems and contexts within which C4D operates.

Organisations and communities are seen as greater than the sum of their parts. Using new methodologies such as EAR and Outcome Mapping (Earl et al., 2001), this approach includes analysis and understanding of the inter-relationships, inter-connections and networks between the various organisations, groups and agents involved in an initiative (directly or indirectly) and the boundaries and local communicative ecologies within which an initiative operates. The process also includes continuous monitoring of the communication environment to gather timely information that will further develop and improve C4D initiatives and ensure they meet community needs and interests.

In addition, the framework takes a holistic, participatory, learning-oriented approach to evaluation capacity development. This is seen as a long-term process that focuses on building the capacity of an organisation as a whole, strengthening M&E systems, and improving coordination, cooperation and collaboration between internal and external agents and groups. Research shows that developing and maintaining good communication and relationships between those involved in an ECD process is critical to success (Horton et al., 2003: 56; Lennie et al. 2012).

Component 3: Complex

Along with systems thinking, there is a growing trend towards seeing complexity theory and complexity-based research and evaluation approaches as offering valuable alternatives to understanding how development and social change actually occurs (Miskelly et al., 2009; Papa et al., 2006; Ramalingam et al., 2008). The key benefits of a complexity approach are:

- Takes a more realistic and holistic approach to development and change
- Helps to clarify solutions to complex problems
- Encourages greater experimentation and innovation
- Generates new insights and responsiveness to different ideas, attitudes and values
- Encourages continuous learning and utilisation of evaluation results
- Focuses on multiple perspectives and inclusion/exclusion.

Social systems within which C4D initiatives are developed, implemented and evaluated are seen as operating in ways that are nonlinear, unpredictable, chaotic, disorderly and emergent. Our framework recognises that social change and C4D are complex and involve processes that are often contradictory and challenging. In this approach, the evaluation process recognises that C4D is often undertaken in social, economic and cultural contexts with high levels of social conflict, and involve people and organisations with multiple perspectives and agendas. This means that the outcomes of C4D are often unpredictable or unknowable in advance. Evaluation approaches therefore need to be flexible, participatory, creative and well-planned and facilitated in order to adequately take the complexity of social change into account.

In this context, evaluations of C4D need to include an analysis of social and organisational norms and other complex contextual factors that often affect the process of social change. To be most effective, a rigorous mixed methods approach is required that can provide a fuller and more realistic picture of change and can capture the voices, concerns and values of diverse stakeholders (Bamberger et al. 2006; Hearn et al., 2009).

For example, the participatory methodology that we developed and trialled in AC4SC used a mixed methods PM&E approach. This process included community researchers in five regions of Nepal using a range of participatory tools with small groups to understand local issues and to gather feedback on EAN's activities, as well as implementing the Most Significant Change technique (Davies & Dart, 2005) to gather stories of changes that had emerged through listening to EAN's radio programs. Other feedback and statistical data was collected from larger numbers of people through short questionnaire

surveys. This data was later triangulated to increase the rigour of the results and to better understand the complex contextual factors that affected community perceptions and impacts of EAN's programs. These factors included the uptake of technologies such as mobile phones and television, and emerging changes in the social, political and economic systems within Nepal.

Component 4: Critical

Many contemporary and participatory approaches to evaluation openly acknowledge and take into account the political nature of research and evaluation practices and differences between participants, particularly those related to gender, power and knowledge (Burns, 2007; Hearn et al, 2009; Lennie, 2005). However, recent research shows that gender is in danger of slipping from the international development agenda (Newton, 2011), suggesting the need for more effective evaluation approaches that focus on gender.

Our framework seeks to actively and explicitly address issues of gender, caste, ethnicity, age, educational levels and other relevant differences, and unequal power and voice among participants. Issues of gender, power and control are openly addressed in the evaluation and critical reflection processes. The evaluation focuses on local social norms and the challenges, contradictions and paradoxes that often characterize the process of social change. The evaluation is also based on an awareness of the strengths and limitations of various evaluation approaches, methodologies and methods, and is open to negative findings and learning from failure.

For example, the Finding a Voice project, which further developed EAR, aimed to help communication initiatives gain broader participation in their content creation activities. To do so it was necessary to understand who engaged with the initiatives, who did not, and why. The EAR researchers involved in the project explored factors that prevented certain groups from participating, and helped to inform engagement strategies. This was clearly illustrated through the work with a mobile telecentre in Sri Lanka. The e-Tuktuk was developed to be a mobile version of the fixed multimedia centre in a rural area of Central Province. While the centre attracted a range of people, a clear gap was identified with a particular population group that was geographically very close, but in all other ways remote from the Centre. This was the extremely poor Tamil community who lived in dilapidated line houses, and worked as casual labourers if they could get employment at all.

The factors that prevented participation were complex, to do with ethnicity, language, social positioning, economic and educational status, the history of the Sri Lankan conflict, and years of discrimination. Simply taking the centre to the community using the e-Tuktuk was not enough on its own, but gradually small gains were made by thinking creatively about how to engage with young people from the community (Grubb & Tacchi, 2008; Tacchi & Grubb, 2007). Such work can lead to small gains that need to be understood within the wider context and systems in which this community exists, in a complex situation of apparently intractable problems, which may nevertheless be considered adaptive, or evolving.

Component 5: Emergent

Emergence is a key concept in complexity theory. It describes how 'the behaviour of systems emerges – often unpredictably – from the interaction of the parts, such that the whole is different to or greater than the sum of the separate parts' (Ramalingam et al., 2008, p.8). This stresses the importance of a holistic approach to developing and evaluating initiatives. Emergence is also about 'giving up control, letting the system govern itself as much as possible, letting it learn from the footprints' (Johnson, 2001 in Patton, 2011, p.126). This emphasises the significance of self-organisation for effective social change and development (Chambers, 2008; Lacayo, 2006; Ramalingam et al., 2008)

In our framework, social change and the outcomes of C4D are considered as processes that are emergent – they are non-linear, dynamic, messy, and unpredictable. An emergent approach recognises that communities and local contexts are not static, and aims to provide a better understanding of the complex process of social change. Evaluation processes therefore need to be dynamic, flexible, adaptive, alert to critical incidents and tipping points, and based on relatively simple principles and processes such as self-organisation, powerful listening, and continuous feedback loops. They also need to be capable of capturing outcomes and ripple effects that go beyond or are different from underlying assumptions about the outcomes of initiatives and the process of social change.

An example from Papa et al. (2006, p.152-153) highlights the need for evaluations of C4D to be capable of capturing unexpected or unpredictable changes that can emerge from C4D-inspired discussions and subsequent community action. Papa et al. describe how a married couple from Madhopur village of Bihar in rural India heard a radio program in which a young girl's birthday was celebrated. This led them to discuss why they had never celebrated their 7 year old daughter's birthday. They realized that it was traditional in their village to celebrate a son's birthday with much public fanfare but not a daughter's. Inspired by the radio program and animated by their discussions, they decided to publicly celebrate their daughter's birthday. This was the first time in Madhopur's history that this had happened. Following this event, several birthday celebrations for girls were held in Madhopur and other neighbouring villages.

Component 6: Realistic

Systems and complexity theories and PM&E can help us to conceptualize, understand, and evaluate complex development interventions in a realistic way (Miskelly et al., 2009; Ramalingam et al., 2008). As Lacayo (2006, p.23) points out, 'instead of describing how systems *should* behave, complexity science focuses the analysis on the interdependencies and interrelationships among its elements to describe how systems *actually* behave'. From this perspective, the focus is on the actual process of development and change and the networks of relationships and complex contextual factors that influence people's behaviour, actions, emotions and decision making (Patton, 2011, p.117-118).

Our UN consultations found that there are often unrealistic demands, targets and timeframes for the impact assessment process and donors often want to see results in an unreasonably short timeframe. We therefore identified a need to take a more realistic, long-term view of the impacts of C4D and the evaluation process, and the benefits of PM&E. Evaluations should be proportionate to the scale of the initiative and its timeframe in order to achieve outcomes that are realistic. For many C4D initiatives this requires longitudinal studies in order to build effective relationships and to assess outcomes over a much more realistic period of time. However, funding for such studies can be difficult to obtain.

To be most effective, evaluation approaches and methods need to be as simple, practical, responsive and rigorous as possible. They must be grounded in local realities, and based on methodological pluralism. This requires openness, freedom, flexibility and realism in planning and implementing evaluation and in the selection of approaches, methodologies and methods. This approach aims to increase the usefulness of evaluation results, which should focus on intended, unintended, expected, unexpected, negative and positive change. As far as possible, locally derived indicators should be developed using dialogue and participatory methods, as well as externally derived indicators (Parks et al., 2005). Alternatives to indicators, such as significant change stories, and 'verifying assumptions' (Guijt, 2000) may provide better ways to monitor significant and sometimes unanticipated or negative impacts associated with long-term development goals.

Component 7: Learning-based

There is a growing trend towards considering evaluation as an integral component of development initiatives and a means of fostering continuous learning, evaluative thinking and a culture of evaluation. Holistic and participatory forms of evaluation are also seen as an important means of strengthening evaluation capacity and improving organisational systems and performance (Horton et al., 2003; Lennie, et al., 2012; Patton, 2008, 2011). Critical reflection, problem-solving and action learning skills are increasingly considered important to the effective, ongoing development and evaluation of development initiatives (Hearn et al., 2009; Lennie et al., 2012). This is due to the need for people and organisations to engage in ongoing learning and to adapt to rapidly changing conditions. The process of engaging in an evaluation can often result in positive changes to an organisation, including to its capacity, processes and culture (Horton et al., 2003; Patton, 2008). These wider effects of evaluation are significant, given the identified need for long-term ECD at all levels of development organisations (Bamberger, 2009; Lennie & Tacchi, 2011a).

The framework is based on action learning and PAR principles and processes that aim to achieve good communication, cooperation, collaboration and trust between those involved. It aims to facilitate and encourage continuous learning, mutual understanding, empowerment, creative ideas and thinking, and responsiveness to new ideas and different attitudes, values and knowledge. Evaluation is fully integrated into organisations and the whole program cycle and involves a diversity of people taking responsibility for research and evaluation activities. This helps to develop the wide range of evaluation capacities that are required in this approach, and to create learning organisations. This process also includes regular critical reflection and ongoing meta-evaluation in order to learn from experience (Lennie et al., 2012).

Conclusion

This paper has briefly outlined a flexible, over-arching framework for evaluating C4D and other complex social change and development initiatives, and key principles for each of its seven components: participatory, holistic, complex, critical, emergent, realistic and learning-based. This framework draws on a number of contemporary frameworks, methodologies and approaches for the evaluation of C4D and international development initiatives, and the outcomes of consultations and rigorous long-term research in C4D and related areas. There are other research and evaluation frameworks and approaches, such as those outlined in Patton (2011), Hearn et al. (2009) and Parks et al. (2005), that also take participatory, learning-oriented, realistic and mixed methods approaches to research and evaluation. However, our framework is based on new and emerging trends, concepts, ideas and practices from a wide range of fields, including holistic and critical approaches to evaluation and social and organisational change, and systems and complexity theory, that are combined in new ways. This combination is designed to contribute to the aim of sustainable social change through C4D and to improving the quality, rigour and utilisation of evaluations of C4D initiatives.

Our research suggests that this framework, and its guiding principles, can be applied effectively in researching and evaluating social change in C4D and in other development initiatives. We suggested that this framework is more appropriate and effective, in the long-term, than dominant upward accountability-based evaluation frameworks for providing an adequate depth of understanding, and contributing to the process of sustainable social change through C4D. It demonstrates that when planned and implemented effectively, participatory evaluation approaches are rigorous and important to the process of social change. It also highlights the value of complexity and systems theory to development and the evaluation of social change initiatives.

This framework is open to revision as we receive feedback on it and learn from the outcomes of projects that apply the framework. We acknowledge that there are many challenges and issues in successfully implementing this framework, given the current context which tends to work against the approach we have advocated. However, it is important to take a long-term view of the value of this approach, which can be cost effective when its many benefits are taken into account.

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