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Meta-evaluation to improve learning, evaluation capacity development and sustainability: Findings from a participatory evaluation project in Nepal

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Authors:

Dr June Lennie, Senior Research Associate, School of Media and Communication, RMIT University, Melbourne, Australia <u>j.lennie@bigpond.net.au</u>

Professor Jo Tacchi, Deputy Dean Research and Innovation, School of Media and Communication, RMIT University jo.tacchi@rmit.edu.au

and

Dr Michael Wilmore, Associate Dean (Education), Faculty of Humanities and Social Sciences and Senior Lecturer and Head, Discipline of Media, The University of Adelaide, South Australia michael.wilmore@adelaide.edu.au

Meta-evaluation to improve learning, evaluation capacity development and sustainability: Findings from a participatory evaluation project in Nepal

Abstract

Recent studies suggest that meta-evaluation can be valuable in developing new approaches to evaluation, building evaluation capacities, and enhancing organisational learning. These new extensions of the concept of meta-evaluation are significant, given the growing emphasis on improving the quality and effectiveness of evaluation practices in the South Asian region. Following a review of the literature, this paper presents a case study of the use of concurrent meta-evaluation in the four-year project Assessing Communication for Social Change which developed and trialled a participatory impact assessment methodology in collaboration with a development communication NGO in Nepal. Key objectives of the meta-evaluation included to: continuously develop, adapt and improve the impact assessment methodology, M&E systems and process and other project activities; identify impacts of the project; and build capacities in critical reflection and review. Our analysis indicates that this meta-evaluation was essential to understanding various constraints related to the organisational context that affected the success of the project and the development of improved M&E systems and capacities within the NGO. We identified several limitations of our meta-evaluation methods, which were balanced by the strengths of other methods. Our case study suggests that as well as assessing the quality, credibility and value of evaluation practices, meta-evaluations need to focus on important contextual issues that can have significant impacts on the outcomes of participatory evaluation projects. They include hierarchical organisational cultures, communication barriers, power/knowledge relations, and the time and resources available. Meta-evaluations also need to consider wider issues such as the sustainability of evaluation systems and approaches.

Key words: evaluation capacity development, learning, meta-evaluation, Nepal

Introduction

Recent studies suggest that meta-evaluation can be valuable in the process of developing new approaches to evaluation, building evaluation capacities, and enhancing organisational learning (Cooksy & Caracelli, 2005; Hanssen, Lawrenz & Dunet, 2008; Uusikyla & Virtanen, 2000). These findings are significant for monitoring and evaluation (M&E) practices in South Asia, given the growing emphasis on improving the quality and effectiveness of evaluation practices and building evaluation capacities in this region (Hay, 2010; Sankar & Williams, 2007).

The increased attention to evaluation capacity development (ECD) on a global level can be attributed, in part, to the growing interest in the use of participatory and collaborative forms of evaluation (Preskill & Boyle, 2008), and to greater awareness of the benefits of incorporating evaluation into programs to facilitate better decision making and ongoing organisational and program improvement (Fetterman & Wandersman, 2005; Horton, Alexaki, Bennett-Lartey et al., 2003; Preskill & Boyle, 2008).

This paper presents a case study of the use of meta-evaluation as a tool for improving the quality, effectiveness and sustainability of a new participatory impact assessment methodology, fostering organisational learning, and evaluation capacity building in the project *Assessing Communication for Social Change* (AC4SC). Using a participatory action research (PAR) methodology, this 4 year research project (2007-2011) was a collaboration between the NGO Equal Access Nepal (EAN), Equal Access—International (based in San Francisco), a research team from Queensland University of Technology and the University of Adelaide in Australia, local stakeholders, and a network of trained community researchers in four diverse districts in Nepal.

The key aim of the project was to develop, implement, and evaluate a participatory impact assessment methodology with and for EAN. EAN produce and circulate radio programs for development in Nepal. The impact assessment methodology built upon Communication for Social Change (CFSC) principles and methods. CFSC promotes dialogue through participatory and empowering approaches. It stresses the role of people as change agents, and long-term social change (see Byrne, Gray-Felder, Hunt et al., 2005). AC4SC project activities included:

- extensive, ongoing evaluation capacity building with EAN's M&E and program staff;
- development of EAN's M&E systems; and
- building a network of community researchers to gather continuous feedback on two
 popular radio programs, contextual information (including information about local issues
 and concerns), and data on program impacts. This process involved developing capacities
 previously established through a successful community reporter network.

M&E data was regularly collected through a participatory mixed methods approach that drew on the Ethnographic Action Research (EAR) methodology (see http://ear.findingavoice.org). A key aim of EAR is to develop a research culture through which knowledge and reflection become integral to a communication initiative's ongoing development (Tacchi, Fildes, Martin et al., 2007).

Following a review of the literature on meta-evaluation, we describe how meta-evaluation was used in the AC4SC project. We critically assess the strengths and limitations of various methods used in the meta-evaluation, and consider some of the many challenges and issues that arose in the process. Next we discuss the ways in which the meta-evaluation strengthened the ECD process and led to valuable practical outcomes such as a comprehensive toolkit for participatory impact assessments that was tailored to meet the needs of Equal Access. Finally, we outline learnings and conclusions that are likely to be useful to others engaged in participatory evaluations and ECD initiatives in the South Asian context.

Meta-evaluation as a tool for evaluation capacity development and learning

The term 'meta-evaluation' has been defined and used in a range of different ways. Meta-evaluation is 'the art and science of evaluating evaluations', a process that is intended to 'enhance the quality, credibility and value of evaluation practice' (Greene, 1992, p. 72). Meta-evaluations can be undertaken of single evaluation studies or can be systematic reviews of a number of evaluation studies (Cooksy & Caracelli, 2005; Uusikyla & Virtanen, 2000). However, while the value and importance of meta-evaluation has been emphasised by leading evaluators, including Patton (2008), Hanssen et al. (2008) note that there have been few examples of meta-evaluations reported in the evaluation literature.

A recent study has highlighted the value of concurrent meta-evaluation as a means of improving the development of new evaluation approaches and strengthening evaluation designs through the 'meta-evaluator-as-coach notion' (Hanssen et al., 2008, p.581). In this study, concurrent meta-evaluation was designed 'to take place alongside an evaluation, rather than before or after it, as suggested by previous work in this field' (Hanssen et al., 2008, p.572). Concurrent meta-evaluation differs from both formative and summative meta-evaluation because it

(a) is conducted simultaneously with the development and implementation of a new evaluation method; (b) has both formative and summative components; (c) is comprehensive in nature; and (d) includes multiple, original data collection methods (Hanssen et al., 2008, p.575).

In addition, they suggest that the meta-evaluator-as-coach notion 'provides an opportunity to strengthen evaluation designs before and as they are implemented' and that this idea 'fits with the evaluation capacity building and participatory evaluation literature where guided

engagement in evaluation is used to improve both the evaluation and the capacities of the individuals and organisations involved (Hanssen et al., 2008, p. 581).

Uusikyla & Virtanen (2000) also provide a valuable extension of the concept of meta-evaluation by stressing the learning-oriented interpretation of this concept. Taking a social constructivist standpoint, they suggest that meta-evaluation can be seen as 'a process that supports an open dialogue and collective judgement over the utilisation of evaluation results and in this way enhances organisational learning through evaluative inquiry' (Uusikyla & Virtanen, 2000, p.52). They also suggest that meta-evaluation can produce wider effects which Patton (2008, p.108) has described as 'process use' – 'cognitive, behavioural, program, and organisational changes resulting, either directly or indirectly, from engagement in the evaluation process and learning to think evaluatively'. These wider impacts are significant, given the identified need for long-term ECD which focuses on organisations as a whole and the development of learning organisations in order to facilitate greater organisational sustainability, and more successful outcomes of development programs (Lennie & Tacchi, 2011).

Meta-evaluation approach adopted in the AC4SC project

The ongoing meta-evaluation of the AC4SC project was similar to the type of concurrent meta-evaluation described by Hanssen et al. (2008) in that it was (a) undertaken simultaneously with the development and implementation of the impact assessment methodology; (b) included both formative and summative components; (c) quite comprehensive in nature; (d) included multiple, original evaluation and critical reflection and review methods; and (e) involved the triangulation of this data. Our approach also resonates with that of Uusikyla and Virtanen (2000) in that we saw the process as a tool for learning that involves 'continuous and reflexive evaluative inquiry' (Uusikyla & Virtanen, 2000, p. 50). This was an important component of the project's PAR methodology. The meta-evaluation required levels of regular critical reflection on project activities that might otherwise not have occurred in the day-to-day implementation of the project.

AC4SC was a project to develop an impact assessment methodology. That methodology *per se* is not explored here. Rather it is the meta-evaluation of the project, which was designed not only to evaluate the project as a whole, but also to improve the effectiveness of the Australia-based researchers' work with EAN, to develop and implement the impact assessment

methodology. This paper focuses exclusively on the meta-evaluation to examine its effectiveness and benefits.

Purposes of the meta-evaluation of AC4SC

There were six key purposes of the meta-evaluation:

- To continuously develop, adapt and improve the impact assessment methodology, EAN's
 M&E systems and process and other project activities so that they better met the needs of
 EAN and other stakeholders. This included ongoing critical assessment of the effectiveness
 of these activities, as well as an assessment of the quality and rigour of data collection and
 analysis processes, and research and evaluation reports and other materials prepared by
 EAN's M&E team and the community researchers.
- 2. To better **understand the context of the project,** including the organisational, cultural, social and communication context, and the various stakeholders and others involved.
- 3. To identify **impacts of the project** on EAN as an organisation and on its M&E and communication systems, radio program development, evaluation capacities, and (to some extent) on the community researchers and on the participating communities.
- 4. To identify strategies that could enable the impact assessment methodology, processes and systems established by the project to become **sustainable** into the future.
- 5. To enable **ongoing learning** about the above aspects of the project. These new learnings and knowledge were drawn on to develop a participatory impact assessment toolkit and other project resources and information.
- 6. To **build capacities** in critical reflection and review in order to further enhance the development of EAN as a learning organisation and to encourage the establishment of an evaluation culture within EAN.

Methods used in the meta-evaluation

The multiple methods that informed each of these purposes of the meta-evaluation included:

- Preparation of a detailed 'baseline' report on existing and past M&E practices of EAN, and
 the organisation of EAN's project and program activities that provided valuable contextual
 information for AC4SC. This was based on field notes and interviews conducted with EAN
 staff.
- An initial survey of key EAN staff at all levels that provided data on existing M&E knowledge and capacities and ECD needs.

- Regular critical review and reflection meetings with EAN staff during field visits by the
 Australian researchers and via Skype chat.
- Group and individual interviews with EAN staff conducted by Australian researchers and by a senior Equal Access International staff member.
- **Feedback questionnaires** completed after capacity building workshops and fieldwork exercises and other key project activities.
- Participant observations by the Australian researchers of project-related activities
 conducted alongside EAN, stakeholder representatives and community researchers.
- A detailed **field work diary** that was kept by the first author.
- Gathering informal feedback and holding informal discussions face to face during field visits by the Australian researchers and by email and a project website.
- Providing detailed feedback on research reports prepared regularly by the M&E team and other M&E materials such as research plans and a codebook for qualitative data analysis.
- Preparing examples of experiences and learnings from AC4SC. These were written by
 M&E staff and included in the impact assessment toolkit.

Qualitative methods were mainly used in the meta-evaluation, but some quantitative data was collected via surveys and feedback questionnaires. Some methods such as questionnaires and interviews were quite structured and formal while other methods such as the use of email and Skype chat discussions were more informal. Outputs from the meta-evaluation included detailed meeting notes, full transcripts of interviews and Skype chat meetings; reports on capacity building activities and project reviews, examples and information prepared for the impact assessment toolkit, and academic papers and publications.

Strengths and limitations of the meta-evaluation

Table 1 presents a critical review of the strengths and limitations of key methods used in the meta-evaluation.

[add Table 1 about here]

Meta-evaluation enabled the Australian researchers to better understand the organisational, social, political and cultural context of the project, and the implications of these contextual factors for the success of the project. For example, individual interviews with EAN staff provided insights into how they conceptualised social change, M&E processes, Nepali culture, and communication practices, while our critical reviews of M&E reports provided an

understanding of the new knowledge emerging from the community-based research, including experiences of gender and caste discrimination, and changes in those experiences of radio program listeners. However, language and communication issues affected this process to some extent. For example, three of the Australian researchers were dependent on translators during some meetings while EAN staff with less fluency in English did not contribute to discussions as much as others.

Using a mixed methods approach to meta-evaluation increased the quality and richness of the feedback, and added rigour to the process. For example, the weaknesses of feedback questionnaires, which did not provide in-depth feedback, were sometimes not fully completed, and tended to provide quite positive feedback, was balanced by the use of individual interviews which provided more critical, in-depth feedback on various project activities.

A key issue for all participatory evaluations and ECD projects is the need for sufficient time and resources (Boyle, Lemaire, Rist et al., 1999; Lennie, 2005). Lack of time was an ongoing issue that affected the meta-evaluation of AC4SC. Some critical review meetings and interviews were rushed because of the large number of activities that the project team needed to complete during Australian team members' visits to Nepal. In addition, it was not always possible to follow through with strategies for improvement due to other competing demands on all of our time.

The meta-evaluation mainly involved EAN staff and community researchers, with some input from EAN stakeholders and the community. Most of the input came from the M&E team. However, our critical reflections suggest that a higher level of engagement with senior staff of EAN and greater ownership of AC4SC within EAN would have resulted in the project being given higher priority, especially in the first years when project-related activity tended to intensify only around visits by the Australian researchers. As other researchers have found, our meta-evaluation highlighted the importance of taking time to form relationships with participants based on mutual trust and effective communication and collaboration (Lennie & Tacchi, 2011; Patton, 2008). Face-to-face critical review meetings conducted in Nepal and the Skype chat meetings that were held regularly in years 3 and 4 of the project built effective collaborative relationships and provided encouragement and support to the M&E team, who often faced considerable challenges in implementing project activities.

Power relations, intercultural communication and other contextual factors

Meta-evaluation of this kind requires an organisational culture in which critical comments are well-accepted, people are willing to learn from evaluations, and leaders actively practice and support this 'learning organisation' ideal. However, issues related to politeness, 'face' and intercultural communication complicated the ongoing process of mutual learning and improvement within EAN. Since Nepali society is based on a hierarchical caste-based culture, this raises macro contextual issues such as deference to authority and teachers. We identified a tendency for the M&E team at EAN to defer to us as 'the experts' and to agree with our suggested strategies for improvements. This can be understood partly as a result of the educational system in Nepal which has a very rigid and conservative structure (Stasch & Hannum, 2001), in contrast to the participatory processes AC4SC was founded upon. Heaton-Shrestha (2004) also points out that the proprieties and power differentials expected within a predominantly hierarchical social system impact on the day-to-day work of development organisations. Another factor was that the M&E team was in a weak and vulnerable position at the beginning of the project. While we encouraged them to be reflexive, they were constantly being criticised by radio content production teams at EAN who did not think that the M&E team were collecting data that added value to their programs.

Staff turnover within EAN hindered the potential to learn from our ongoing meta-evaluation and to 'fine tune' activities in ways that would benefit EAN. During the first 17 months of the project two M&E managers began working for EAN and then left the organisation, while the third manager did not play an active part in the project. The meta-evaluation connection between the Australian researchers and EAN tended to be focused on the M&E manager as the key link. Without a consistent manager in this position who fully understood and supported the project and the methodology being developed, our ability to effectively assist in fine tuning the project was hampered.

Improving evaluation capacity development

The meta-evaluation enhanced ECD at EAN in several ways. We evaluated the effectiveness of interactions between the Australian researchers and EAN staff at the end of all collaborative activities. This helped us to reflect on what kinds of activities and processes for mutual learning and training were most effective. During the capacity development workshops participants took turns to present feedback at the end of each day, reflecting on what they had done and learned, and suggesting what might be given more attention.

One valuable meta-evaluation activity was a critical review undertaken by a member of the Equal Access International management team during a visit to Kathmandu in mid-2010. She conducted group discussions with the M&E team and content teams, and one-on-one interviews with key EAN staff. This produced quite different insights into AC4SC. For example, the M&E team were able to reflect on the processes we went through in AC4SC in order to give advice to others through the toolkit. They complained about the way that the impact assessment methodology developed through AC4SC was not predetermined: there was 'too much change and development as we went, no clear vision from start'. While this was deliberate, it also reflects their frustration with our PAR approach, where we were facilitating rather than directing developments. At the same time, the benefits in terms of ECD were clearly strong, since the M&E team confidently put forward suggestions for improving the research planning process and how others might learn from this process.

As we have indicated, we used meta-evaluation data to construct a transferable impact assessment toolkit for Equal Access and similar communication for development organisations. The M&E team contributed useful examples and other inputs to the toolkit, and provided feedback on its design and overall content. This again produced critical reflection on what they had learned, on what worked well and what needed further modification. Through this process we also found out more about new M&E team activities that are continuously improving EAN programs. Critical reflection and additional learning took place as the M&E team identified how to pass on what they have learned, and fix things that do not work in order to improve the toolkit and make it more useful for others.

Learnings from the meta-evaluation

Our learnings from the meta-evaluation of AC4SC concern the organisational context, communication and relationships; the methodology and meta-evaluation processes; and evaluation capacity development. They include:

Learnings related to the organisational context, communication and relationships

- Take sufficient time to form relationships with participants that are based on mutual trust and effective communication and collaboration.
- Using a variety of communication methods to conduct the meta-evaluation was effective.

- Greater engagement with senior staff and greater ownership of the project within the organisation is likely to have resulted in the project being given a greater priority.
- Staff turnover hindered the potential to learn from our ongoing meta-evaluation and to
 'fine tune' what we were doing in ways that would be of most benefit to EAN.
- The organisational culture, hierarchical and power relationships and other contextual factors affected the meta-evaluation process.

Learnings related to the methodology and meta-evaluation processes

- The meta-evaluation required quite a lot of time and resources that were not always available. This affected the project since we did not always develop useful learnings soon enough to make timely changes to the project.
- The PAR methodology was important to the effectiveness of the meta-evaluation. While
 this 'learning by doing' approach was not always well appreciated, the process of
 collaboratively developing the toolkit provided a perfect vehicle for the kind of reflexive
 practices that we aimed for throughout the project.
- A mixed methods approach to the meta-evaluation increased the quality and richness of the data, and added rigour to the process. The strengths of some methods balanced the limitations of other methods.
- We obtained quite different evaluations of the project when we asked for an explicit evaluation of the project compared to what we obtained through collaboration around a more concrete output such as the toolkit.

Learnings related to evaluation capacity development

- Collaborative development of the toolkit facilitated far more in-depth reflection on what they had done and what they learned in the project, compared with other, more conventional evaluation methods.
- Meta-evaluation outcomes can be effectively used to enrich and enliven the outcomes of
 evaluation projects such as practical toolkits. Using the outcomes in this way enables the
 learnings from such projects to be passed on to others.

Conclusion

In the current era of rapid change, evaluation is increasingly seen by organisations working in a wide range of sectors, both for profit and not for profit, as an ongoing learning process and an important means of strengthening capacity and improving organisational performance (Horton et al., 2003; Lennie & Tacchi, 2011). This is due to the need for people and organisations to engage in continuous learning and to adapt to changing conditions. It is now recognised that the process of participating 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). Such impacts were found through our meta-evaluation of the AC4SC project.

We identified several benefits from our concurrent meta-evaluation of the AC4SC project, particularly:

- Development of an innovative participatory impact assessment methodology, and M&E systems that are likely to be more practical, sustainable and useful than if we had not undertaken the meta-evaluation.
- Increased evaluation skills, knowledge and capacities within EAN, including improved critical reflection and review skills;
- Development of valuable new knowledge and learnings, including knowledge and understanding about the complex organisational, social and cultural context of the project and the effects of such contextual factors on the outcomes of the project; and
- The formation of effective collaborative relationships with participants in the project.

Our review of the strengths and limitations of the meta-evaluation methods used in AC4SC highlight a number of issues that need to be considered in meta-evaluations conducted in challenging development contexts such as Nepal. Several of these issues, such as the need for adequate time and effective engagement of all key participants, are often discussed in the participatory evaluation and ECD literature (see Lennie, 2005; Napp, Gibbs, Jolly et al., 2005). Others, such as acknowledging issues of power, knowledge and organisational dynamics, are less often discussed.

The meta-evaluation of AC4SC was essential to understanding various constraints and issues related to the organisational context that affected the success of the project and the development of better M&E systems and capacities within EAN. We also identified several

limitations of the various meta-evaluation methods, which were balanced by the strengths of other methods. A key finding is that we obtained quite different outcomes when we asked for an explicit evaluation of the project, such as in the in-depth interviews and during critical reviews with EAN staff, compared to what we obtained through collaboration around a more concrete output, such as the toolkit.

The outcomes of this case study have several implications for the development and implementation of participatory evaluation and ECD projects in the South Asian context. They suggest that as well as assessing the quality, credibility and value of evaluation practice and the utilisation of evaluation results, meta-evaluations need to focus on important contextual issues that can have significant impacts on the outcomes of participatory evaluation projects. They include hierarchical social and organisational cultures, language and communication barriers, power/knowledge relations, and the time and resources available. In addition, meta-evaluations would clearly benefit from looking at wider issues such as the sustainability of evaluation systems and approaches, particularly in contexts such as Nepal where effective ongoing capacity building within organisations and the community, and mentoring in participatory evaluation, can be more difficult to obtain.

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Table 1: Strengths and limitations of AC4SC meta-evaluation methods

Methods used	Strengths/benefits	Weaknesses/limitations/issues
Critical review and reflection meetings with EAN staff and community researchers (CRs)	 Enabled concerns, problems and issues to be openly voiced and shared with others. Effective for building trust and collaborative relationships and providing encouragement and support. Enabled collaborative development of strategies and plans to further develop and improve M&E processes and address problems. 	 Participants were not always willing to openly voice all of their concerns, problems and issues due to politeness and deference to the Australian researchers as 'the experts'. Time was required to develop trust and effective collaborative relationships. Some people tended to dominate discussions. Action plans were not always well followed through or completed on time.
Skype chat meetings with EAN staff Face to face individual	 As well as the benefits listed above, they were effective for maintaining regular contact and interaction between the M&E team in Nepal and the researchers in Australia. Transcripts of meetings were obtained instantly. Provided more in-depth 	 As well as the issues listed above, EAN staff with less fluency in English did not contribute to discussions as much. Discussions were usually facilitated by an Australian research team member. EAN staff therefore had somewhat less power in these meetings. More time was needed to gather
interviews with EAN staff	feedback on the project and its challenges, issues and impacts than other methods. • Provided useful insights into how EAN staff in various positions conceptualised the project and the impact assessment methodology, social change, M&E, their radio audiences etc. • Provided valuable insights into Nepali culture and communication practices.	 comprehensive feedback and probe more on key issues. Significant time and resources were needed to fully transcribe and edit the interview transcripts to analyse this data. Conducting effective interviews with EAN staff with less fluency in English was challenging.
Critical review interviews by a senior EA staff member	 Enabled EAN staff to more honestly and openly voice their criticisms, issues and frustrations and to reflect on how project activities could have been done better. Led to open discussions on these issues and how to overcome them. Provided valuable learnings that were included in the impact assessment toolkit. 	 The interviewer was not familiar with all project activities so did not probe more on particular issues of interest to the Australian researchers. Several content staff who took part in AC4SC had left EAN and did not provide input to the review. New staff were much less familiar with the project so could not provide useful feedback. Notes rather than full transcripts were prepared so a full account of the issues and details on who made comments was not available.
Questionnaires on capacity building activities	Provided useful feedback on various activities and how they	Feedback was not in-depth.Because these activities were usually

distributed by email	 could have been improved. Provided a good mix of qualitative and quantitative data. Gathering this feedback via email was easy and efficient. 	quite enjoyable, more positive feedback than negative may have been provided. • Australian researchers were less able to utilise feedback from EAN staff with less fluency in English.
Providing feedback on research and evaluation reports and other M&E materials	 Helped to gradually improve the quality and usefulness of research and M&E reports and to establish better data management and analysis systems. Regular M&E reports provided the Australian researchers with a better understanding of the data and issues emerging from community-based research. 	 Developing the M&E team's ability to analyse and interpret qualitative research and evaluation data proved particularly difficult. Some feedback on reports had to be given in various ways to help EAN staff understand what the Australian researchers were suggesting. The process highlighted the complexity of the impact assessment process and the need for rigorous yet practical data collection, management, analysis and reporting processes, which were not always easy to achieve.
Preparation of examples of experiences and learnings from AC4SC by M&E staff for inclusion in the toolkit	 Encouraged staff to critically reflect on the project and how their M&E systems and practices had changed. Uncovered positive impacts that the Australian researchers were not aware of. Highlighted the extent to which M&E staff understood the AC4SC principles, methodology and methods. Encouraged M&E staff to take more ownership of the toolkit. Resulted in the inclusion of a module on the 'Critical Listening and Feedback Sessions' technique developed by EAN as part of AC4SC. 	 It took quite a lot of time, feedback and support to obtain the type of input that would be most useful for the toolkit. One M&E team member provided most of the input, based on some consultations with other staff.