

# The political context of evaluation: what does this mean for independence and objectivity?

**Anne Markiewicz**



*Anne Markiewicz is the Director of Anne Markiewicz and Associates. Anne has been operating her consultancy for the past 12 years, specialising in developing monitoring and evaluation systems and conducting evaluation projects.*  
Email:  
<anne@anneconsulting.com.au>

Evaluation takes place within a political and stakeholder context that has benefits for the relevance and usefulness of the evaluation. However, the politicised context also presents challenges in preserving evaluator independence and objectivity, with potential adverse consequences for the credibility of the evaluation. This article proposes that evaluators need to recognise and negotiate these challenges effectively to ensure that a quality evaluation results.

## Introduction

Evaluation takes place within a political context. It is also increasingly influenced by the variety of positions presented by actively involved stakeholders. The political and stakeholder influenced context of evaluation is a reality that brings with it many benefits for the relevance and the use of evaluation findings. However, this context also presents a number of challenges for the evaluator. In particular, there are challenges in preserving evaluator independence and objectivity in a politicised context, with potential adverse consequences for the credibility of the evaluation.

Many evaluators have experienced undue influence from commissioners of evaluations or key stakeholders involved in the process. This influence can affect each stage of the evaluation process but is particularly highlighted during the formulation of evaluation findings or recommendations. It is proposed that evaluators need to negotiate such challenges effectively, potentially armed with evaluation standards to support their case. A credible evaluation is necessary to enable both commissioners of evaluations to make informed decisions and evaluators to produce quality work. The knowledge, skills and experience of the evaluator in attaining balance between the impact of political and stakeholder influences and interests and delivering credible evaluation findings is critical to the future of evaluation and its utility.

The challenges presented by the political and stakeholder context of evaluation do raise the longstanding paradigm wars between scientific realists and social constructionists. The former group of evaluators tend to uphold concepts of objectivity and independence in evaluation, while the latter group of evaluators view themselves as negotiators of different social realities (Taylor & Balloch 2005, p. 1). Here it is proposed that it should be the common endeavour for all evaluators, along the continuum of scientific realism and social constructionism, to produce credible evaluations that reflect some degree of objectivity and independence from political and stakeholder influence.

This article commences by examining briefly the political and policy-driven context within which evaluation takes place. It neither attempts to provide a

theoretical analysis of the policy context, nor debate whether the political context should impact on evaluation. It is considered to be a given that the political and policy context does have considerable impact on evaluations. Rather, this discussion provides a summary of the challenges and implications for the evaluator of working within a political context. This is followed by an examination of the stakeholder context in evaluation. Furthermore, the adoption of utilisation-focused and participatory models that involve stakeholders in the evaluation process are supported. It is suggested that, as with the political context, there has to be some reconciliation between the influence of the participating key stakeholders in the evaluation and the credibility of the evaluation process and its findings.

Concepts of credibility and trustworthiness in evaluation are briefly discussed next, and this is followed by consideration of the concepts of independence and objectivity in evaluation. Finally, consideration is given to the role of the Australasian Evaluation Society in developing practice standards to support the work of evaluators in their complex negotiations with commissioners and stakeholders in regard to issues such as independence and objectivity.

The challenge for evaluation highlighted in this article is thus:

*The process of adopting a politically grounded, policy-relevant and participatory approach to evaluation whilst also pursuing a credible evaluation approach to the collection, analysis and reporting of evaluative data.*

### **The political context of evaluation**

Evaluation has been depicted as a complex process that has to balance different interests. It is a process that is 'saturated with political concerns' (Berk & Rossi 1990, p. 13). Taylor & Balloch (2005, p. 1) suggest that evaluation is 'socially constructed and politically articulated'. The presence of differing and sometimes competing interests amongst stakeholder groups in evaluation has been recognised as a distinguishing feature of the discipline (Alkin, Hofstetter & Xiaoxia 1997; Berk & Rossi 1990; Guba & Lincoln 1989a; House 1993; Patton 1997). It would be naive to suggest that evaluation can operate in such a highly politicised and interests-driven environment without being significantly influenced or affected by it.

Political dimensions to evaluations commence from the time it is decided to evaluate, as decisions are made about the purpose and role of the evaluation (Taylor & Balloch 2005, p. 8). There are subsequent political decisions made throughout the evaluation about membership, budget, timelines, scope, focus, boundaries, design, method, detail, findings, recommendations and dissemination. In relation to all these aspects of the evaluation, the evaluator can become involved in complex discussions and negotiations about what is considered

necessary for a credible evaluation and what is politically desirable or pragmatically acceptable.

Evaluations are often commissioned by government departments and organisations with particular policies and programs they need to implement. Commissioners and stakeholders may desire certain approaches or outcomes from an evaluation that intersect with their organisational mandate and interests. They want programs to continue, to alter in certain directions, or to cease, and anticipate evaluations supporting their respective interests. Pressure can be placed on the evaluator to identify certain findings from the evaluation and make specific recommendations (positive or negative depending on the circumstance) that are consistent with prevailing political agendas. Policy shifts over the course of the evaluation frequently result in changes to the expectations of the evaluation process, its focus and its results. Pressures emanating from the political context present challenges for evaluators in maintaining the degree of independence and objectivity required during the evaluation process and when interpreting findings. Personal pressures on the evaluator can result in them accommodating political agendas and interests with a potential decline in the quality and level of trustworthiness of the evaluation.

The response of the evaluator to the influences brought to bear by political interests and policy agendas can be varied. Commercial providers of evaluation services can struggle to balance their intent to maintain objectivity and independence with their business interests. For example, an evaluation consultant may find that a program is not working well when assessed against its purpose and objectives and identify findings leading to recommendations to guide program redesign or improved performance. It may not be in the interests of the commissioner of the evaluation to have the program portrayed as under-performing. The commissioner of the evaluation may indicate to the evaluation consultant that the data requires reinterpretation and findings need to be 'softened' or 'moderated'. The evaluation consultant may thus experience a conflict of interest between meeting the needs of the client (and potentially gaining further contracts) and maintaining the objectivity and independence of their findings.

Maintaining objectivity and independence can also be a challenge for the internal evaluator, as they have to balance independence with organisational imperatives and loyalties, as well as their own career progression. For example, an internal evaluator may experience the same dilemma as depicted above, but risk losing support within their organisation. This dilemma could be heightened if the commissioner of the evaluation is the immediate line manager of the internal evaluator.

The evaluator can thus feel compelled to produce findings or outcomes that are consistent with those anticipated from the commissioning client and in line with their broader political, economic and organisational imperatives. Pressures can be exerted on the evaluator to highlight positive feedback

and play down negative or critical feedback for a program, or alternatively to highlight negative feedback and reduce the level of positive feedback for a program the commissioner of the evaluation is hoping to scale back or close. There can also be pressures to ensure that findings are palatable to the service system or community, in order not to 'rock the boat' in delicate interface relationships between government, service providers, communities and beneficiaries.

### Exemplar case studies

The following case studies are exemplars based on real situations faced by the author, that illustrate the challenges that can confront an external evaluator working in a politically-influenced context.

In the case studies below, the evaluators were placed under considerable pressure to review the data and findings emerging from the evaluation process either to portray the program more positively, or to downplay achievements. In both scenarios, the pressures placed on the commissioners of the evaluations related to prevailing government

agendas that influenced their approach and responses. In Case Study 1 such pressures emanated from the political process taking place in advance of an election and in Case Study 2 to a contraction in the mandate of the department and the removal of programs that did not fit the new purpose. The tensions between the commissioners and evaluators emerged most strikingly at the point of writing the first draft of the final report, inclusive of recommendations. In both instances, the evaluations were not well synchronised with the decision-making process, with Case Study 1 making refunding decisions before the evaluation was completed, and in Case Study 2 the program being terminated mid-way during the evaluation.

Although the evaluators were prepared and willing to receive feedback from the commissioning clients (e.g. when there had been errors in the facts presented, missing data or information, questionable analyses, or a need for greater clarity in expression and meaning), the feedback provided by the commissioning clients proceeded down the path of overt pressure to change the content of the findings and the construction of the recommendations.

## CASE STUDIES

### Case study 1

The evaluation was commissioned by a state government department and commenced 12 months prior to the completion of the pilot period of three-year funding provided for this program. One of the aims of the evaluation was to determine if ongoing funding should be provided to continue the initiative. The evaluation found the program to be underperforming in several respects according to its stated goal and objectives and so a number of recommendations for program redesign were made. The findings emerging from the evaluation were relayed to the commissioners of the evaluation as soon as they became evident.

Towards the end of the 12-month evaluation period a state election was announced. The political party in government at the time was concerned with the particular social issue that this program was established to address. The commissioning client expressed their imperative to showcase successful strategies that the government had funded on this particular social issue. The decision had been made by the state government to re-fund the initiative for a further three-year period with no substantial alteration to the design of the model or its method of delivery.

The evaluators were placed under pressure to review and reframe the data, rephrase the findings and reword the recommendations, in order to provide an overall, more positive evaluation than the data supported. The commissioning client attempted to amend the draft report to indicate where such changes to the text should be made.

The situation was resolved by the evaluation team largely adhering to the contents of the original text used in the final report with minor modifications. It is not known how the evaluation report was subsequently used or applied, or if it was 'shelved'. It is suspected that the latter was the most likely outcome.

### Case study 2

During the conduct of an evaluation of a program it became clear that the commissioning client had decided to cease its funding. Program staff members were given notice and midway during the evaluation the program ceased to operate.

The methodology for the evaluation generated data to indicate that the program had been performing well according to its goal and objectives and that it had developed a great level of support from the target communities. This data was assembled into a final evaluation report.

During discussions over the contents of the draft final report pressure was placed on the consultants to adopt a more critical response to the program and to identify greater areas of under-performance than the data supported.

During the final presentation of the report it was suggested by the commissioner that a greater focus should have been placed in considering the appropriateness of the program model for auspice by the particular government department rather than its overall effectiveness and results.

Pawson (2006) supports such experiences of the intersection between policy and evaluation practice emerging from these case studies by commenting on his own experiences with evaluations that had been tossed around as a consequence of changes in political winds. He describes how 'the policy axe had fallen before the research had even gained its stride' (p. 174). Pawson also comments that 'politics, in the last analysis will always trump research' (p. 175).

Thus there are dilemmas for the evaluator when they face a distinct choice between adhering to an objective process or accommodating the organisational imperatives of the commissioning client. There are also challenges for purchasers of evaluation services in using the services of an external or internal evaluator that brings with them objectivity and independence through use of an evidence-based process of data gathering, assessment, analysis and findings and recommendations. It is suggested that greater levels of knowledge and skills are required on behalf of both evaluators and commissioners to negotiate the complex interconnections between politics and evaluation.

### **The stakeholder context in evaluation**

The importance of stakeholders and their participation in evaluation has been recognised by many evaluation theorists. There are different rationales about why stakeholders are considered essential to the process of evaluation. Two prominent aspects of current evaluation practice and theory are the concepts of utilisation and participation. The focus on the aim of increased utilisation of evaluation findings, together with the increasing value placed on participation as part of an empowerment approach to evaluation, have placed more emphasis on the involvement of stakeholders in the evaluative process.

Stakeholders are defined as those who have a stake in the evaluation process or a vested interest in the outcome of the evaluation. Stakeholders can include policymakers, funders, program planners, managers, program deliverers, practitioners, community members and program beneficiaries (Guba & Lincoln 1981, 1989a; Weiss 1983a, 1983b).

There have been a range of models of stakeholder involvement developed based on either utilisation or participation principles, or a combination of both. Examples of models primarily based on principles of utilisation include Stake's responsive model (1983); Patton's utilisation-focused evaluation (1997); Guba and Lincoln's fourth-generation model (1989b); and Byrk's stakeholder-based-evaluation (1983). Cousins and Earl (1995) also proposed a model of participatory evaluation as a means of increasing the relevance of social inquiry knowledge for the benefits of organisational learning and change. Fetterman, Kaftarian and Wandersman (1996) meanwhile, put forward a model of empowerment evaluation, which emphasised self-determination.

Participatory evaluation models are not defined through their use of common methodologies, but rather through their underpinning values. These values include shared ownership of the process, empowerment of program deliverers and beneficiaries to become active participants in the process, collaborative learning, and decision-making. Participatory models thus transcend the use of evaluation solely for accountability to funders by supporting a process that builds the capacity of program participants and facilitates shared learning (Dugan 1996; Estrella 2000; Mikkelsen 2005). The degree of participation embedded in the evaluation, along the continuum of high to low, determines: how collaborative the process is in identifying what will be monitored and evaluated; how and when data will be collected and analysed; how it is interpreted; and how findings will be shared and used to inform decisions.

While there is growing support for participatory approaches to evaluation, there can be a concern with challenges to evaluation rigour through the use of such approaches, due to reduced capacity for objectivity and independence. Lennie (2006) argues that evaluation rigour does not need to be compromised when adopting participatory approaches. She identifies a number of strategies that can be used in participatory evaluations to ensure rigour, such as relationship building with stakeholders, data triangulation, critical reflection, external validation, rigorous data analysis, and stakeholder review of data. However, such strategies do require the involvement of skilled and experienced evaluators with the time and funding available to implement the methods.

Adopting a participatory approach to stakeholder involvement in evaluation thus needs to be a process that is clearly defined in terms of the expectations and boundaries of such involvement. Similar to negotiating the political context of evaluation, the stakeholder context creates a number of challenges for the evaluator and the evaluation project if not carefully planned and managed. Adopting participatory approaches on their own will not be sufficient to reconcile the reality of delivering an evaluation that is both credible and capacity-building at the same time.

### **Credible evaluations**

Credibility in evaluation is often described using a range of different terms such as accurate, fair, believable, honest, balanced, defensible, valid, reliable, justifiable, unbiased and impartial. Patton (1997, pp. 260–261) states the credibility, and therefore utility of an evaluation, are affected by the steps we take to explain our evaluative decisions. In other words, an evaluation has to be defensible to be useful. The concepts of credibility and trustworthiness in evaluation are well described by Schwartz & Mayne (2005, p. 2) who outline their concerns regarding the credibility of evaluative information:

The success of the current boom in the use of evaluative information will remain largely dependent on its credibility. Program evaluations, performance reports and performance audits all claim to provide objective representations of the reality of program outputs and outcomes, economy, efficiency and effectiveness. Perceptions that evaluative information misrepresents reality (intentionally or not) are likely to render it useless—other than as a tactical weapon in political and bureaucratic skirmishes. There is some evidence suggesting the risk of a credibility crisis regarding much evaluative information.

A number of authors have also supported the perceived threat to the credibility of evaluative information resulting from political and organisational pressures. Schwartz and Mayne (2005, p. 2) state that ‘observers of program evaluation practice have long warned that political and commercial pressures on evaluation clients and on evaluators lead to a priori bias in evaluation reports (Chelimsky 1987; Palumbo 1987; Schwartz 1998; Weiss 1973; Wildavsky 1972)’ (p. 2). They also go on to suggest that one major threat to the credibility of evaluative information concerns the political, organisational and commercial pressures that can result in bias in evaluation reporting.

Therefore, the challenge for the evaluator is to respond appropriately to the inevitable influences resulting from political and policy considerations, together with the increasing involvement of a range of stakeholders with differing interests.

### **Independence and objectivity**

The terms ‘independence’ and ‘objectivity’ are often used interchangeably in evaluation to depict the process of adopting an autonomous and impartial position in the conduct of an evaluation. They are distinct, but inextricably linked concepts. Independence generally refers to the evaluator being awarded the freedom to conduct the evaluation without undue control being exerted by the commissioners of the evaluation, the organisation or program delivery personnel. Objectivity refers to the evaluator’s capacity to undertake unbiased and objective assessments and form conclusions during the evaluation.

For the purpose of this article, independence refers to the freedom of the evaluator to pursue the rigour of the evaluation process without compromising the imperatives and pressures emerging from the immediate political and organisational context, the commissioners of the evaluation or its associated stakeholders. Objectivity refers to the impartiality exercised by the evaluator during the selection of evaluation methodology, the approach to the conduct of the evaluation, and the interpretation of findings.

Both internal and external evaluator perspectives are considered here, with the assumption that evaluators working from either of these

positions will attempt to approach evaluations with independence and objectivity. Both groups can experience pressures to compromise their independence and their objectivity, whether due to the pursuit of commercial imperatives, or due to organisational loyalties and effects on career advancement prospects.

A range of ethical and practice dilemmas arise for evaluators when they attempt to preserve their independence and objectivity, and these come to light particularly during the stages of identification of findings and presentation of recommendations. Postmodernist theorists would argue that all interpretations of data that result in findings and recommendations are subjective, arising from our personal position, values and orientation in life. Thus, the same set of data can be interpreted in different ways depending on the perspective being used to interpret it. It would be difficult to argue that our subjective lenses do not impact significantly on data analysis and interpretation. Furthermore, Patton (1997) claims that utilisation-focused program evaluation transcends the notion of the pursuit of pure objectivity to attain fairness and balance by placing an emphasis on using appropriate, credible and useful data. Conley-Tyler (2005) also notes the flaws in the adoption of an objectivist approach, and asserts that the best that can be achieved is evaluator impartiality. Taylor and Balloch (2005) describe the paradigm wars taking place in evaluation between those arguing for an independent reality capable of objective description and those arguing that knowledge is contextual and subjective—with the evaluator acting as facilitator and negotiator of different perspectives characterised by multiple views, audiences and accountabilities.

It is my view, based on attendance at many Australasian Evaluation Society conferences, that on balance, contemporary evaluators in the Australasian context are less likely to want to be depicted as evaluation experts using objective scientific research techniques. Rather, they would generally acknowledge that they operate as facilitators of a process of inquiry conducted in a political environment characterised by the involvement of multiple players and perspectives. However, contemporary evaluators, on balance, also place high value on accuracy, impartiality and defensibility in reporting sources of data and in their evaluation findings. They also marshal evidence to support their conclusions. It is this approach of effectively combining a more contemporary policy, influenced by a participatory model of evaluation with evaluation rigour, that requires further exploration and development in the evaluation literature.

The question is how to manage the intersection of contextual influences on the evaluation, with goals of evaluator independence and objectivity, in the best way. Strategies and approaches for operating successfully within the political and stakeholder environment without forfeiting a degree of independence and objectivity in the process are vital for the future of evaluation practice.

Evaluation standards may assist this process. These are considered briefly in the following section.

### Evaluation standards

Evaluation societies have developed ethical codes, practice guidelines and standards to guide and inform the conduct of evaluations (AEA, 2002; AES 2000, 2006). Fraser (2001) identifies the key differences between these documents. He states that ethics are about right and wrong whereas standards are about quality and adequacy.

Swartz and Mayne (2005) support the development of standards for evaluation as a first step in quality assurance. These authors analysed evaluation and quality assurance mechanisms in the European Union, the World Bank, and in the four countries of Canada, France, the Netherlands and Switzerland. The authors identified three types of standards, these being product quality, process quality and usefulness. Their investigation of product quality revealed similarity in the standards concerning objectivity including:

substantiated and impartial/objective findings/conclusions. The findings and conclusions presented should be supported by the evidence gathered (data and analysis) and should be presented in an impartial (objective) manner (p. 6).

Meanwhile, the evaluation standards developed by the Swiss Evaluation Society (2000) provide a specific section on what they term 'neutral reporting'. They state one principle regarding evaluator independence, which is that:

Many different perspectives exist in the environment of evaluation. Stakeholders themselves often hold diverging views of the object of an evaluation. Any given evaluation also runs the danger of being instrumentalized or captured by a particular group or interest, though an evaluation should avoid adopting any one specific point of view. Rather, it should be concerned to represent all relevant interests fairly, and it is important for that reason that an evaluation should take as independent position as possible. An evaluation should avoid being too closely linked to those who have commissioned it, but should also avoid being too close to those persons who are responsible for the object of the evaluation. (Swiss Evaluation Society 2000, p. 12)

The above quotes illustrate some attempts that have been made by evaluation societies to produce evaluation standards that encourage evaluators to maintain their professional independence and objectivity.

Practice standards and guiding principles, ethical guidelines and codes developed by evaluation societies provide some guidance and direction for

evaluators in negotiating issues of objectivity and independence, and ideally should be adopted as a framework for the evaluation at the outset. The Australasian Evaluation Society (AES) has developed *Guidelines for the Ethical Conduct of Evaluations* (2006). However, these do not specifically refer to issues of independence or objectivity. Fraser (2001) has argued that the AES should develop professional 'threshold' standards that identify minimum requirements to be met before an evaluation product or process can be judged to be of acceptable quality. There is merit in the further consideration of the recommendation of Fraser (2001) that the Australasian Evaluation Society develop its own evaluation standards to address the broader range of practice issues and dilemmas, and thus provide greater guidance to commissioners and practitioners of evaluation.

### Conclusion

The political and stakeholder context of evaluation provides an exciting, if somewhat challenging environment for evaluators to operate within. On the one hand, it is beneficial to see evaluation involving and encouraging the active participation of diverse and varied stakeholders, with the range of interests and mandates they represent. It is also worthwhile placing the evaluation in its policy context to ensure it is relevant, worthwhile and useable. On the other hand, the political and stakeholder context poses some challenges for the evaluator, where interests can result in pressures that impact on the independence and objectivity of the evaluation process. This tension often results in the emergence of a range of ethical and professional dilemmas for the evaluator that requires the evaluator to develop clarity about their roles, responsibilities and boundaries.

This article has argued that the evaluator needs to be proactive about protecting the independence and objectivity of the evaluation process in order to produce a credible evaluation product. The evaluator has to juggle professional conduct that preserves the integrity of the evaluation with values of participation, inclusion and responsiveness to context. This article has also argued that commissioners of evaluations need to develop greater levels of awareness of the value of independence and objectivity in the pursuit of quality and credible evaluations.

There are many levels of potential response to the tensions that emerge in managing the relationship between evaluation and its political environment. Evaluation societies have a role to play both in developing practice and ethical standards for evaluators and in increasing the awareness of commissioners of evaluation about the requirements for, and benefits of, an evaluation that is rigorous, defensible and credible. Large contracting organisations and bodies also have a role to play in specifying codes of conduct for evaluations that they commission.

For the evaluator, an important first step is to outline the requirements for objectivity and independence on the part of the evaluator during initial contract negotiations and the establishment phase of the evaluation, specifying compliance with practice standards or ethical guidelines. The development of practice standards by the Australasian Evaluation Society would assist this process further. Having external and recognised codification to assist negotiations and specifying compliance with ethical codes, or practice standards in evaluation contracts, could work towards the achievement of shared understandings of the need for evaluations to operate within clear parameters. It may also be appropriate to identify at the commencement of an evaluation, the methods or approaches that could be used if dilemmas or difficulties arise along the way, with clear agreed conflict resolution strategies.

At a more interpersonal level there is reliance on the skills of evaluator as negotiator to manage the evaluation process in order to ensure that the ethical and practice dilemmas that arise are well managed. The role of evaluator as negotiator (Markiewicz 2005) is critical to the success of the evaluation. The evaluator requires skills in managing a process where the political conflicts that underpin an evaluation are exposed and discussed, with strategies developed for their resolution.

Discussion in preceding pages has identified a range of issues that require further consideration in order to improve the interaction between evaluation and its political context and to produce credible evaluations that reflect principles of independence and objectivity. Further work is required to outline in greater detail, the nature of the interface relationships between evaluation and its political context, and the implications of this for evaluation practice. In this regard, it is reassuring to see recent texts that examine the relationship of evaluation to the political and policy context (e.g. Taylor & Balloch 2005; Pawson 2006). This is a journey that both the evaluator and stakeholders involved in evaluations must continue to travel, hopefully armed with greater levels of knowledge and skills about the nature and features of this relationship and the benefits to be achieved by supporting a credible evaluation product.

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