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## **ACTION RESEARCH-BASED SUSTAINABILITY EVALUATION: THE CASE OF TOURISM PRODUCT DEVELOPMENT**

This paper theoretically elaborates and empirically explores the ways in which action research methodology might be applied in the field of sustainability evaluation. It discusses the implications of action research for the evaluation of sustainable development initiatives that intend to follow the recommendations included in the “Bellagio principles”. Special attention is given to the operationalization of a participative and continuous learning process that is driven by a clear vision of sustainable development. Action research methodology is illustrated by presenting findings from the implementation and evaluation of a pilot project, which aimed at assisting a group of female micro-size enterprises in their efforts to improve their product development skills. The general purpose of the evaluation was to explore (a) how this particular group of entrepreneurs and their stakeholders understood the notion of sustainability; (b) how those understandings were translated into practice through a product development process that was based on action and reflection; and (c) how a better understanding of sustainable development supported their product development efforts.

### **1 Introduction**

Since the introduction of sustainable development by the Brundtland Commission (World Commission on Environment and Development, 1987) and its later ratification in Agenda 21 (United Nations Conference on Environment and Development, 1993), there has been a proliferation of techniques and approaches for monitoring performance and assessing progress towards sustainability (see Parris & Kates, 2003; Pintér et al., 2005). A considerable number of indicators and indexes have, for instance, been drafted for measuring the ecological, social and economic dimensions of sustainable development at the international, national, regional and even household levels (see Hardi & Zdan, 1997; Organisation for Economic Co-operation and Development, 1999; United Nations, 2007). In a similar vein, several methods and models have been suggested for the evaluation of the sustainability of development policies, agricultural programmes and urban planning, among others (e.g. Holden & Linnerud, 2007; Hurni, 2000; Lee & Chan, 2008). Furthermore, the increasing concern of companies with the assessment of the environmental and social impact of their activities has contributed to the introduction of a whole range of managerial

evaluation tools, such as e.g. ISO 14001 (Chan & Wong, 2006), SA-8000 (Social Accountability International, 2008), and the forthcoming ISO 26000 (International Organization for Standardization, 2008).

On the other hand, the complexity and multidimensional nature of sustainable development has led some researchers to deliberate on the many dimensions of sustainability evaluation and the basic premises that guide this type of evaluation (e.g. Becker, 2004; Hardi & Zdan, 1997; Bagheri & Hjorth, 2007). In this literature, sustainability evaluation is seen as a continuous assessment process that relies strongly on stakeholder participation. This becomes especially emphasized in the “Bellagio principles” which is a recognized set of guidelines for designing and implementing sustainability evaluations and disseminating their outcomes. These principles were developed by an international panel of measurement experts at the end of 1990s and since then, these principles have offered guidance for evaluators in dealing with the assessment of sustainable development initiatives (Hardi & Zdan, 1997). According to Becker (2004: 12), the Bellagio principles can be summarized in five main premises: (1) public participation to identify the goals of the evaluation and to ensure recognition of diverse and changing values; (2) visualization to help establish a clear vision of sustainable development; (3) assessment content to determine the most suitable measurement criteria and indicators; (4) presentation of the results to engage a broad spectrum of society and feed insights to the public; and (5) actualization to promote collective learning and adaptability to change. Instead of isolated premises, as argued by Hardi and Zdan (1997, 8), the Bellagio principles offer an interrelated set of standards that are designed to be used as a complete set of recommendations.

In practice, however, sustainability evaluation continues to be practiced as a simple measurement task that relies on external expertise, scientific knowledge and effective communication strategies. Most sustainability evaluation techniques seem to extend considerable efforts mainly to comply with the Bellagio principles in terms of assessment content and presentation of the results, thereby failing to adequately address the remaining three principles. Indeed, despite the advancements in the field of sustainability evaluation, little knowledge exists about how public participation, visualization and actualization can be effectively realized.

In this paper, our aim is to contribute to these research needs drawing particular attention to the methodological challenges encountered in establishing a vision of sustainable development that is able to keep with the dynamics of this complex social phenomenon. In line with Guba and Lincoln (1989), we argue that these challenges are a consequence of the main limitations that stem from the conventional roles of the evaluator as a controller and discover of facts. Indeed, the nature of sustainable development requires evaluators to assume an active role in facilitating reflection, learning and change among the participants of an evaluation. It is the evaluator’s responsibility to create an arena in which different stakeholders can take part in the (re-)definition of the vision of sustainability. Hence, the methodological framework used in the evaluation process should allow participants to learn from one another as well as teach on another under the facilitation of the evaluator.

In this paper we hence theoretically elaborate and empirically explore the ways in which action research methodology might be applied in the field of sustainability evaluation. More specifically, the aim is to shed some light onto the possibilities of constructivist action research in establishing a clear vision of sustainable development in specific evaluation contexts. In so doing, we provide insights into how stakeholder participation and reflection may help practitioners gain insights into the complexity of sustainability and use these new insights in their daily practices. This paper thus offers stimulating ideas on alternative methods, theories and evaluative frameworks that can be useful for evaluators who are dealing with the assessment of sustainability. Furthermore, it draws special attention to the role of morality in establishing a vision of sustainable development.

We present empirical findings from a pilot project, which aimed to support product development efforts in a group of female micro-sized enterprises operating in the tourism sector. The general purpose of the evaluation was to explore how this group of female

entrepreneurs and their stakeholders understand the notion of sustainability, how those understandings were translated into practice through a product development process of action and reflection, and how a better understanding of sustainable development supported their product development efforts. We intend to make our experience beneficial for the sustainability evaluation community by discussing innovative ways that help to gain insights into the complexity of sustainable development and thus facilitate the development of holistic sustainability strategies based on a multi-stakeholder perspective. The empirical data consist primarily of ethnographic material (interviews, workshops, meetings, video, photographs, and fieldnotes), focus groups and secondary data (brochures, reports). The interviews, which were conducted during the initial stage of the evaluation, aimed to determine a common vision of sustainability that was accepted and supported by the entrepreneurs participating in the project. Focus groups, on the other hand, were carried out with customers in order to gain insights into their view of sustainability. Workshops and meetings, which were attended by project participants and other stakeholders, provided additional empirical data. Secondary data was used to determine the position of local authorities towards sustainable development. All this data collection process contributed to the continuous redefinition of the vision of sustainability within this particular evaluation context.

In the sections that follow, we begin by taking a glance on action research, in general, and drawing attention to the relevance of this methodological approach within the field of sustainability evaluation, in particular. Then, we continue to illustrate the setting of the evaluation and action research process used for implementing and evaluating the pilot project. We present the outcomes of the evaluation by linking them to four major moral philosophies. And finally, we discuss implications of action research for sustainability evaluation and the effective application of the Bellagio principles.

## **2 Action research: A methodological approach to sustainability evaluation**

Action research represents a form of inquiry grounded in the actions of its participants and their critical reflections about the consequences of their actions (Ballantyne, 2004). There is some evidence that this particular way of doing research was already used in education at the end of the nineteenth century and in community development at the beginning of the twentieth century (McKernan, 1996). Action research as a method of inquiry, however, started to gain recognition in the 1940s through the work of social reformists such as Collier, Lippitt, Radcke and Lewin (see Dick, 2007; Masters, 2000; McKernan, 1996). And it was particularly Lewin's work that gave impetus to the action research movements in different fields (Kemmis & McTaggart, 2005). Lewin's conception of action research as a cyclic process, which includes analysis, fact-finding, conceptualization, planning, implementation and evaluation, provided the groundwork for the theoretical development of this methodological approach (Dickens & Watkins, 1999; Sanford, 1970). It is worth noting that over the years the evaluative aspect included in Lewin's cycle-process, which has become the essence of any action research approach, has been influential in the field of evaluation (see Rossi et al., 1999). For instance, Dick (2002) regards action research as an evaluation process aiming at understanding and change. In practice, this is confirmed by the activities of the Tavistock Institute – a major actor in the further theoretical development of action research (Rapaport, 1970) – which has been not only using this methodology in evaluation assignments but also hosting "Evaluation – The International Journal of Theory, Research and Practice". There is indeed an extensive body of literature that discusses the application of action research as an evaluation methodology in different fields such as education (e.g. Iversen et al., 2006; Markless & Streatfield, 2006; McKernan, 1996), health services (e.g. Armitage et al., 1991; Swantz, 2008; Portillo et al., 2009; Van Eyk et al., 2001) community development (e.g. Folkman & Rai, 1997; Martin, 2008; Suarez-Balcazar & Harper, 2003) and organizational development (e.g. Meynell, 2005; Taut, 2007). Nevertheless, with the exception of few studies (e.g. Dodd et al., 2008; Lennie, 2005), little attention has been drawn to action research in relation to sustainability evaluation. Action research should not be confused with participatory evaluation, which is a well-known form of evaluation to

promote collaboration with stakeholders. While participatory evaluation aims mainly at supporting decision making by involving stakeholders in certain aspects of the evaluation process (Brisolara, 1998), an action research approach to evaluation involves stakeholders throughout the research process across definition of the evaluation objectives, design, data collection, analysis and application of the evaluation findings. Unlike participatory evaluation, action research assumes that the act of actively involving stakeholders as co-evaluators help them participate in the process of knowledge construction and thus develop new skills and capacities (Fals-Borda & Anisur-Rahman, 1991).

The lack of interest showed toward action research within the sustainability evaluation literature can have an explanation in the general concern for measuring and determining how successful efforts are at meeting sustainability objectives. For the purpose of measurement, sustainability evaluation approaches thus tend to follow the premises of evaluation traditions that are rooted in positivism, positivist-empiricism and post-positivism (see Guba & Lincoln, 1989). Indeed, there are two common elements found in most sustainability evaluation approaches that point towards those research philosophies. First, the idea that the evaluator should not influence the evaluand or any part of the research environment in order to assure the reliability and objectivity of the evaluation. Second, the prevailing practice that the client and evaluators are the main actors responsible for determining the evaluation design, the evaluation objectives, how the data will be collected and interpreted and to whom the findings will be disseminated. These elements seem to be particularly unsuitable for the evaluation of sustainable development which has to deal with human-beings embedded in an interrelated social and ecological system. In line with Meriläinen et al. (2000: 69), the idea of a disembodied and de-contextualized human being – evaluator and/or evaluated – becomes not only unrealistic but more importantly also disguises the ways in which the evaluand and their stakeholders are dependent on unsustainable transfers from nature and society. As such, the evaluation of sustainable development requires evaluators who allow themselves and encourage stakeholders to become active participants in the evaluation process. Since this particular idea is converse to the scientific criteria commonly use to validate most evaluations, it seems opportune to discuss how validity is achieved in an action research-based evaluation.

By drawing upon Heinz Moser's criteria for validity of action research (see Swantz, 2008: 43), the validation of an action research-based evaluation occurs through the transparency of the evaluation process, compatibility of the evaluation objectives with the methods used in the evaluation and the expertise of the evaluator who should know the evaluand better than any outside observer. Hence, it is just the particular position of the evaluator in combination with the active engagement of the stakeholders that contributes to the validity and authenticity of evaluation based on action research (see Gergen & Gergen, 2008). Practices, interactions and the whole social context become not only validating elements in the evaluation but also contribute to a better understanding of sustainable development (see Swantz, 2008; Longino, 2002).

We argue, consequently, that the validity and quality standards of action research-based sustainability evaluation are to be essentially based on a plurality of knowing and a deeply understanding of the value and purpose of an evaluation project (see also Reason & Bradbury, 2008). This way of thinking has been supported by a host of scholars who argue for constructivist approaches to evaluation, in which evaluators go beyond simple discovering, description and judgment of facts to actively assuming an active role in co-creating findings with stakeholders (e.g. Dryzek, 1993; Folkman & Rai, 1997; Guba & Lincoln, 1989; van der Knaap, 1995). Nevertheless, it is worth noticing that the application of action research to evaluation is not exclusively restricted to the constructivist perspective. Action research offers a flexible evaluation approach, which is receptive to any kind of techniques and research traditions, including quantitative research and positivism. Therefore, the design and implementation of an action research-based sustainability evaluation will depend on the underlying epistemological assumptions and world views of the evaluators, client and potential stakeholders.

Toward the end of facilitating the operationalization of visualization – namely the establishment of a vision of sustainable development – found in the model of the Bellagio principles, we focus exclusively on the constructivist perspective on action research-based evaluation. Central to this type of evaluation is the ideal that key stakeholders assume the role of co-evaluators and are thus included in decision-making through all phases of the evaluation process. Together with the evaluator, these stakeholders generate data and make interpretations about the outcomes that are to be produced (Folkman & Rai, 1997). All this takes place in a collaborative relationship based on ongoing dialogue and interaction. Whereas in conventional evaluation approaches the criteria used to judge the evaluand is usually imported into the process by the evaluator, in the constructivist approach that we propose here evaluation criteria is open to development through self-reflection (see Carr & Kemmis, 1986). The practical deliberation and reflective communication between the evaluator and stakeholders contribute to gaining understanding on the situation being evaluated. In line with Grundy (1982), it can be argued that the constructivist approach to action research-based evaluation seeks to improve practice through the application of the personal wisdom of the participants. In this respect, while the evaluator plays a key role in facilitating the evaluation process, the co-evaluators have the knowledge and expertise that is just needed to assess the different aspects of sustainable development in relation to their every-day life context. In the spirit of Carr and Kemmis (1986), it can be argued that the evaluator's role as a participant-facilitator becomes Socratic as it represents a kind of sounding-board against which co-evaluators may try out ideas and learn more about the process of self-reflection.

The application of action research to sustainability evaluation can help in overcoming the traditional conceptualizations of human-beings and nature, typically informing the more conventional methodologies, which tend to reproduce the view of the scientists as the knowing agents, thus excluding other knowers and alternative ways of understanding sustainable development from the evaluation process. As such, action research represents an opportunity to expand the scope of sustainability evaluation beyond the prediction and control of outcomes to promote dialogues and critical reflection that contribute to exposing the underlying values, assumptions and reasoning behind the multiple views of sustainable development (Folkman & Rai, 1997). According to Rossi et al. (1999), the idea of stakeholder participation can lead to better understanding of the evaluation results, their acceptance and thus a larger sense of responsibility to do something with them. It should, however, be noted that participation is not only used here in the sense of including stakeholders' needs, concerns and interests but of promoting a trustworthy understanding of sustainability that includes multiple perspectives. This is in line with the idea of “*multi-stakeholder processes*” suggested by Hemmati (2002) in which attention is drawn to the wealth of subjective views, knowledge and experiences generated through stakeholding processes.

The discussion above indicates that action research holds great promise as a methodological approach to evaluating sustainable development initiatives. In effect, action research does not only contribute to assessing the success or failure of an activity aiming at sustainability but also to increasing our understanding of the notion of sustainable development. The role of action research in fostering progress toward sustainability is caught in the following statement made by Reason and Bradbury (2008: 4): “*A primary purpose of action research is to produce practical knowledge that is useful to people in the everyday conduct of their lives. A wider purpose of action research is to contribute through this practical knowledge to the increase well-being – economic, political, psychological, spiritual – of human personas and communities, and to a more equitable and sustainable relationship with the wider ecology of the planet of which we are intrinsic part.*”

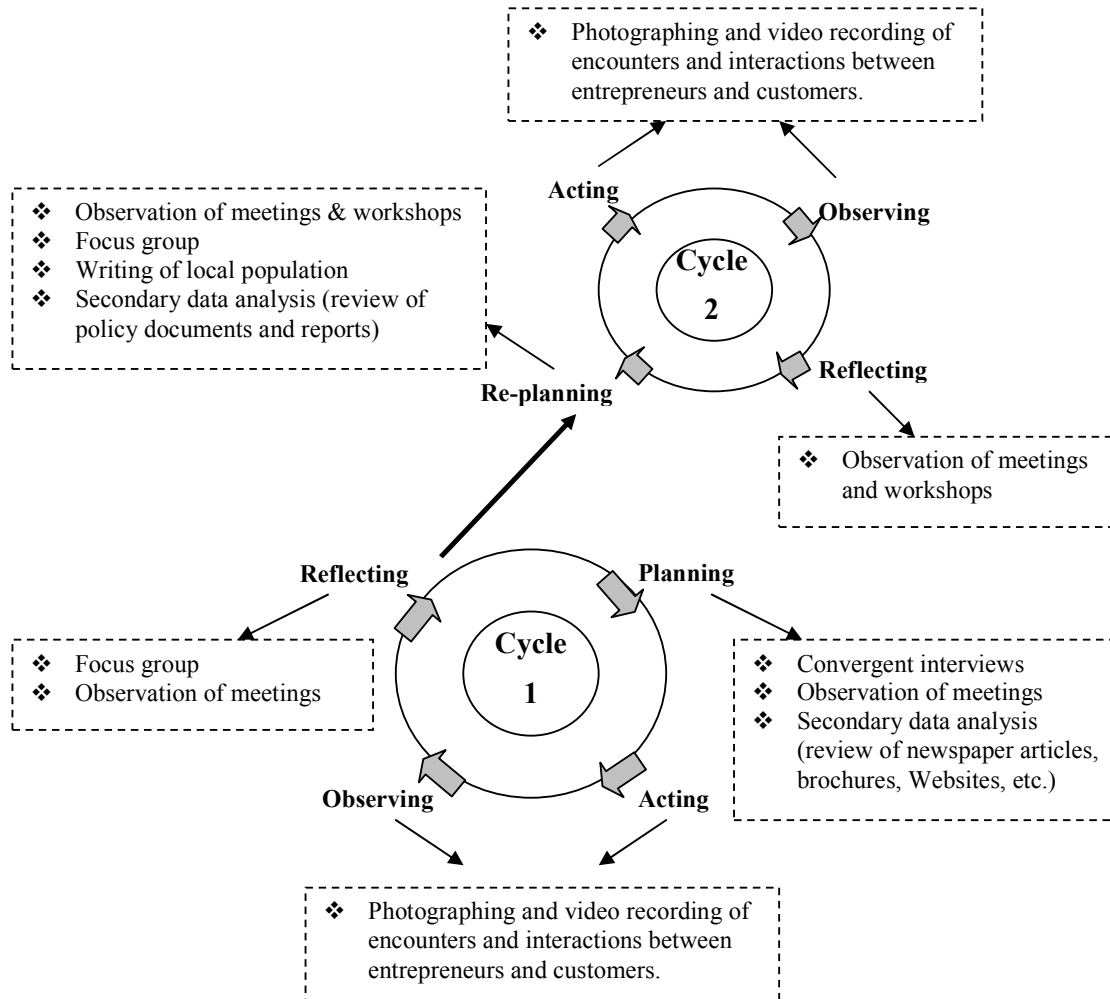
### **3 Methodology and data**

The product development pilot project was part of a series of activities supported by “Equality Trail” a project co-funded through the Equal Community Initiative, run by the Finnish Ministry of Labour and implemented by the University of Lapland (see Ahola et al., 2008). The pilot

project was aimed to support the consolidation of women's leadership and entrepreneurship – Equality Trail's main objective – by promoting product development efforts in female micro-sized enterprises situated in or close to rural areas. This is relevant to the Finnish Province of Lapland for two major reasons: first, the vitality of Lapland's rural economy is highly dependent to on micro-sized enterprises specialized in handicrafts, hospitality, restaurants and other services related directly or indirectly to the tourism sector (see Regional Council of Lapland 2007a; 2007b); and second, more than half of those enterprises are led by female entrepreneurs (Merenheimo, 2006). Hence, the improvement of product development performance in small female enterprises contributes not only to furthering female entrepreneurship but also to adding value to the economy and improving the quality of life of the societies living in this Finnish province. The pilot project was co-ordinated and evaluated by a small team from the University of Lapland led by one of the co-authors, a marketing doctoral candidate. The pilot project was launched in May 2006 and ended in July 2007.

The pilot project started with several meetings involving the co-ordination team which made decisions concerning the target group, methodological approach as well as the focus and scope of possible activities to be developed and carried out. Soon after the pilot project plan and strategy were established, the co-ordination team made an open invitation directed to female entrepreneurs to join the project initiative. While eight entrepreneurs were admitted to the project, only seven were finally able to join it. These seven micro-sized enterprises operate in different service sectors such as catering, hospitality, pottery, natural health care, tourist tours, gastronomy, photography and interior decoration. While some of the participants operated in the same localities, others were more geographically dispersed. This geographical disparity, which represented a big challenge for the implementation of the project activities, was overcome through effective time planning and the use of information technology. In addition to the entrepreneurs, the ongoing evaluation of this pilot project relied upon the participation of customers, local residents and regional authorities.

Whereas it was agreed that the pilot project's main goal is the promotion of female entrepreneurship through the improvement of product development skills, the objectives of the evaluation were not defined until the launch of the pilot project. Indeed, it was through interactions with the entrepreneurs that the co-ordination team realized sustainability issues to be central to their business ideas. Based on this, they decided that the evaluation should aim to gain insights into the complexity of sustainable development by exploring how this group of entrepreneurs and their stakeholders understand the notion of sustainability, how those understandings are translated into practice through a process of action and reflection and how a better understanding of sustainable development contributes to support their product development efforts. The implementation and evaluation of the pilot project consisted of two action research cycles and proceeded according to the phases – plan, action, observe and reflection – described by Zuber-Skerritt (2001:15). An overview of the action research process and the methods used in the evaluation is presented in Figure 1. These methods are discussed below following the steps of the action research process.



**Figure 1:** Overview of the action research process and methods used for evaluating the pilot project.

### *First cycle*

#### *Planning*

The planning phase concerned building an understanding of sustainable development shared by the group of entrepreneurs who were participating in the pilot project. To that end, seven convergent interviews were conducted to elicit entrepreneurs' positions to and perceptions of sustainability. A host of researchers has suggested the use of convergent interviewing for investigating under-researched areas and complex situations (e.g. Dick, 1990; Rao & Perry, 2003; Williams & Lewis, 2005). Indeed, by providing a structured way of processing interviews and analysing data, this technique contributes to the evolving understanding of the subject under scrutiny (Rao and Perry, 2003). Each convergent interview was appropriately recorded on audiotape and then transcribed. All interviews were carried face-to-face at the respondent's place of work. The duration of the interviews varied from forty-five minutes to two hours approximately. Since the main questions and the probe questions were open and the interview semi-structured, the respondents had the opportunity to respond freely expanding and elaborating their responses (Dick, 1990). Following Maignan et al. (2005) recommendations, we complemented the interview data with information about the enterprises that was available in sales brochures, newspaper articles and Web sites. As one of the outcomes of the data analysis, a two-page memo describing their common vision of sustainable development was drafted. The memo was presented to the entrepreneurs in a half-day session and tested for validity through their critical reviews. So, after discussions

and exchanges of ideas, the entrepreneurs agreed that the memo accurately reflected their perceptions of sustainable development. In a second meeting, the entrepreneurs came together to discuss and determine: Which products will be evaluated? In which context and under which conditions? What kind of methods will be used in the evaluation? As an outcome of the second meeting, the entrepreneurs decided that the evaluation object will be a tourism programme consisting of a collection of their products, namely a series of crafting activities. Later, in a third very lively meeting, the group of entrepreneurs designed together a two-day tourism programme to be used as the evaluation object. During all these meetings, it was possible to follow interesting dialogues that provided further insights into how this group of entrepreneurs understood the idea of sustainable development. In addition to facilitating all these meetings, the action researcher (evaluator) made sure that the main elements expressed in the common vision of sustainable development are considered in the planning of the tourism programme.

### *Acting and Observing*

Five Finnish customers were invited to test the two-day tourism programme designed by the group of entrepreneurs. The programme was tested in a small town of Lapland during the spring of 2007. All the programme activities (incl. accommodation, eating, etc.) took place in small compound of cabins close to a pond and surrounding by forest. The customers were translated by minibus from Rovaniemi (the province capital) to their final destination where they were received by their hosts. Data was collected through participant and non-participant observation supported by techniques such as note-taking, videotaping and photographing. During this step the evaluator and co-evaluators (entrepreneurs) played a key role in overseeing the implementation of the whole tourism programme. While the entrepreneurs made some notes and took some pictures, the evaluator took main responsibility for photographing, videotaping and making field notes of the activities, dialogues and interactions between the entrepreneurs and their customers. It is worth noting that observation here has been regarded as context for collaboration between the evaluator and co-researchers, rather than a single method for collecting data (Angrosino & Mays de Pérez, 2000). In particular, the data obtained through participant observation has been very enlightening of the evaluation process described in this paper. A total of 150 pictures and a sixty-minute film of the event were made.

### *Reflecting*

Right away after the implementation of the programme, the five customers were invited to a focus group conducted by the evaluator. Focus group was found appropriate for this evaluation study since it promotes the emergence of multiple perspectives on a particular issue (Krueger & Casey, 2000). In this particular evaluation, it should help to gain insights into how this group of customers understands sustainability in relation to the programme they just tested. The focus group, which included a visual exercise (Heisley & Levy, 1991), lasted an hour. During the focus group discussion participants were indeed asked to comment on five photographs which show their participation in different activities of the programme. While the focus group discussion was recorded on audiotape and appropriately transcribed, only a two-page summary was delivered to the entrepreneurs. Parallel to the focus group discussion, the entrepreneurs gathered in another cabin for mulling over their experiences with the customers and the two-day programme as a whole. Notes taken during this particular enlightened session were brought to a meeting held three weeks later for the purpose of refining and improving the programme by considering the perspectives of their customers and other stakeholders (see re-planning). In addition to their notes, the reflection process was supported by the results of the focus group, the evaluator's observations and abundant visual material (photographs and videos). All in all, this phase of the evaluation process helped the group of entrepreneurs not only to evaluate the programme but also to enrich their vision of sustainable development by gaining new insights into the complexities of this social phenomenon.

## *Second cycle*

### *Re-planning*

In order to translate into practice the lessons learned from the test of the tourism programme, a meeting with the entrepreneurs was arranged. The meeting, which took place three weeks after the end of the first cycle, was organized as a half-day session. This gathering offered entrepreneurs the opportunity to redesign the programme based on observations and reflections made during the first test. In addition to the data gathered through the focus group and the field notes made during the first cycle of the evaluation, the points of view of the local community and authorities were brought into the discussion. For that purpose, the evaluator relied on data collected through essays written by local community members and secondary data in form of publicly available policy documents and reports. The evaluator considered important to take a broader look at the context in which product development was taking place. While some members of the local population participated in the different workshops and meetings of the pilot project, there was a need to gain further insights into how the local community approaches sustainable development. To that end, the evaluator invited eight vocational tourism students to write a short essay about their perception of sustainable development in relation to tourism. On the other hand, documents published by the Regional Council of Lapland (2007a; 2007b) provided information about its position on sustainability in connection with the tourism sector. Also a second focus group was conducted with five Spanish customers who were expected to participate in the second test of the programme in summer 2007. The focus group, which took place in Spain and lasted one hour, was conducted by a local facilitator under the instructions of the evaluator. During the focus group discussion, the participants had the opportunity to watch and thus comment on a ten-minute video that presented the activities included in the first test of the programme. In contrast to the first focus group, the idea here was to determine how foreign customers who have not ever been to Lapland related sustainable development to the tourism product offered by the group of entrepreneurs. All this additional information that was brought by the evaluator into the meeting helped the entrepreneurs not only to increase their awareness of sustainability but also to refine their tourism programme according to the expectations of customers and other stakeholders.

### *Acting and Observing*

Around 20 customers from Spain participated in the second test of the tourism programme. While the programme took place in the same locality and compound of cabins of the first test, the duration time was extended to three days. After arriving to the airport of Rovaniemi, the customers were translated by bus to their final destination where they were expected by their hosts. Data was collected, as in the first test, through participant and non-participant observation supported by techniques such as note-taking, videotaping and photographing. In order to facilitate the communication with the customers, the entrepreneurs relied on the service of a professional interpreter (Spanish-Finnish). In addition, brochures, booklets and other informative material were available in Spanish. A total of 100 photographs were taken and sixty-minute film was recorded during the second test.

### *Reflection*

During the second cycle, reflection was carried out in two different occasions. The first reflection session was organized right after the end of the programme. Customers were invited to participate in a workshop to discuss their experiences with the programme and learn more about the entrepreneurs behind it. Certainly, it provided an opportunity for creating a dialogue between the customers and their hosts. The discussions were facilitated through the simultaneous interpretation offered by the interpreter. The workshop was audio recorded for further data analysis. The second reflection session, which was arranged among the entrepreneurs, took place after the workshop and lasted one hour. It was an opportunity to recapitulate all the experiences and observations made during the second test of the programme. The resulting thoughts of the first and second reflection sessions were brought into a third session which took place two weeks after the second test. The main

purpose of this session was that the evaluator sits together with the entrepreneurs to mull over the lessons learned during the two tests of the programme and the project as a whole. As a result of all these reflection session, the entrepreneurs agree on future collaboration activities.

#### **4 Outcomes of the evaluation**

The action research approach adopted for the implementation and evaluation of this pilot project allowed the evaluator to step beyond the role of manager and controller to joining the practitioners as an equal collaborator. Thereby, he was able to work with the participants to delve deep into their understanding of sustainable development and how they relate it to the object under evaluation. Especially understanding and documenting these viewpoints became an important aspect of this evaluation because they have significantly influenced decisions concerning the product development process. The vision of sustainability, as experienced along this evaluation process, was not static; but rather nurtured through a range of perspectives reflecting a number of different situations, realities and political positions. While in this section we describe the evaluator's role in constructing a vision of sustainable development in collaboration with the entrepreneurs, we also draw special attention to the role of "*values*" in the assessment of sustainable development.

As we will illustrate in the sections that follow, the visualization of sustainable development within an evaluation context is characterized by different and often conflicting values. By values we mean the core set of beliefs and principles deemed important and desirable by individuals or groups (see Andrews, 1987; Cheney & Vibbert, 1987; Mason, 1992). As the environmental and societal debate implies discussions about rightness, fairness and justness of procedures to address economic, environmental and social affairs, values in the context of sustainability are directly related to moral issues. Morality thus seems to be a key factor not only in establishing but also in challenging any vision of sustainable development. It is in this sense that learning about different moral philosophies proved, as experienced by the evaluator, to be useful in understanding the driving forces that influenced how the environment and society are understood and related to by individuals and groups within a particular socio-cultural, economic and political context. While the evaluator was involved in a learning process of gaining deeper theoretical insights, he did not directly transfer this knowledge from the literature to the entrepreneurs. On the contrary, the better awareness of morality helped the evaluator to create an arena in which the entrepreneurs can learn from one another and from other stakeholders. In line with Guba and Lincoln (1989: 261), the evaluator took a leadership role not only in assisting but also in actively shaping the emergent vision of sustainable development. In this evaluation, the evaluator was able to identified four different perspectives on sustainable development that seem to draw upon the basic assumptions of four moral philosophies: virtue ethics, ethical egoism, deontology and utilitarianism (see DesJardins, 1997; Rachels & Rachels, 2007).

##### *From a silent to a virtuous vision of sustainability*

As the pilot project was launched in May 2006, the evaluator only knew that he is going to work with a group of female entrepreneurs interested in improving their product development skills. At that time, none of these entrepreneurs mentioned any strong commitment towards sustainable development. It was the evaluator who, after realizing a strong relationship between sustainable development and the business ideas of these companies, took the initiative to suggest them a sustainability approach to product development. Indeed, it was through a review of secondary data (e.g. Websites, brochures, newspaper articles) related to the companies that the evaluator recognized a form of "silent sustainability" (see Jenkins, 2004; Perrini et al., 2006). By silent sustainability, we mean companies that are already involved in environmentally friendly and socially responsible practices without thinking of them in those terms. As a result, one of the first tasks of the evaluation process was to help these entrepreneurs to become aware of their silent sustainability and to define a vision of

sustainable development that can guide their product development efforts. To that end, the evaluator relied not only on secondary data but also on the data collected through the convergent interviews. These data sources helped the evaluator to gain preliminary insights into the evaluation context and identify the main elements driving the entrepreneurs' perspective on sustainable development. Both the increased awareness and the findings of the data analysis helped the evaluator to launch a collaborative learning process that encouraged entrepreneurs to confront each others' inputs and thus work towards a common vision of sustainable development.

This vision, which was validated by the entrepreneurs, draws clearly upon the idea of "good life" reflected in virtue ethics (see e.g. Kakkuri-Knuuttila, 1993). The understanding of sustainability shared by this group of entrepreneurs was driven by a strong fascination for arts, culture, nature and local traditions and an interest of sharing it with other people who sympathize with their ideas and values. If their activities were carried out in an environmentally friendly way it was only because their own character and personal values and not because of any external force that said so. This is in line with DesJardins' (1990: 54) claim that a responsible business is not one that measures its actions against some external principle. Furthermore, by regarding their business as a way of life and profits as a means to doing just that, they seem to agree with Aristotle, for whom wealth was only an instrument and not the final purpose of human life. Their sustainability vision thus included a holistic approach to business, since not only profits but also employees' well-being, customer satisfaction, good relationships with the local community as well as respect for local traditions and the natural environment were considered as important aspects of good business life. By making these elements explicit, the evaluation process also contributed to establishing the evaluand. Indeed, the group of entrepreneurs decided to commit themselves to the development and evaluation of a tourism programme based on their virtuous vision of sustainable development. The evaluator especially acted as an advisor in the field of product development by pointing out what the entrepreneurs had to look out with regard to designing the programme according to their vision.

#### *A virtuous vision of sustainability with a pinch of self-interest*

Early in the planning for this pilot project, the co-ordination team recognized the relevance of involving customers in the product development process. Later, as the objectives of the evaluations were defined, particular attention was given to how sustainability is perceived by customers in relation to the tourism programme and whether it matches the virtuous vision of sustainable development shared by the entrepreneurs. While the findings of the first focus group indicated that customers associated the sustainability of the tourism programme with the eccentric character of the entrepreneurs, they also revealed some aspects that can be related to ideas rooted in ethical egoism. According to this ethical theory, there is only one ultimate principle of human conduct, that of self-interest, and this principle summarizes all of one's obligation (Rachels & Rachels, 2007). In the context of this evaluation, ethical egoism is deduced from customer claims about how caring for other human beings and the natural environment can be an effective means for creating some benefits for themselves. Customers indeed seemed to relate sustainability with personal well-being. For instance, in the first focus group the sustainability of the tourism programme is discussed in relation to experiences related to freedom, sharing, healthiness, self-realization, having a good conscious and being pampered. As one customer put it *"I was truly touched by the sensation that you are able to break free to forget about time and release yourself from any kind of stress, you simple let everything go by itself..."* Another customer stated *"You get a good feeling, you are able to relax when you see that the hosts are not overwhelmed... in some places you feel like you have to apologize for stepping in."* Customers also saw some elements of sustainability in the naturalness of the different objects (local food, clay, wool, twigs, etc.) However, they were again discussed in terms of the benefits they provide to themselves. For instance, the environmental friendliness of some materials was related to their non-toxicity, namely the safety aspect. On the other hand, all customers who tested the programme were delighted with its degree of participation and inclusion. According to them,

the idea of a tourism programme that involves customers into crafting activities contribute to promoting relationships, co-operation, mutual understanding and other human values; that is key elements of sustainable development.

By drawing upon this feedback, the evaluator worked towards a plan for helping the entrepreneurs to accommodate their customers' views. In particular, he made emphasis on the need to regard the programme as a holistic process rather than a collection of single crafting sessions. He helped the entrepreneurs to understand that their customers' perception of sustainability went beyond their virtuous vision of sustainable development. This task was not so difficult since most entrepreneurs were able to learn a lot not only from their customers but also from the interactions taking place during the tests. Especially after the first test, some of the entrepreneurs started to refer to their programme as "participative tourism". By participative tourism they meant a form of tourism in which the visitor works together with their hosts to create the tourism experience. The group understood that while their own character and personal values are central to the programme, their customers are interested in the benefits that a sustainable product can offer to them. Most of the changes made in the programme were related to the communication strategy (description of the programme, customer benefits, etc) and the timing of the activities. The latter was essential for making the programme more participative, flexible and enjoyable.

### *The role of utilitarian and deontological sustainability perspectives*

By reviewing reports and policy documents from one of the leading regional authorities, the evaluator drew the entrepreneurs' attention to a different, but usual, way of understanding sustainable development within the tourism sector. In effect, these reports refer to sustainable development as an approach that contributes to safeguarding the rights of future generations (i.e. local inhabitants, tourists) to a viable and healthy environment in Lapland. This way of thinking seemed to prevail among local community members who see sustainability in tourism as a means to preserve local traditions and natural resources for their descendants. In contrast to the perspectives discussed above, this position is grounded in a deontological approach to ethics. For deontologists, tourism companies have especial commitments to their stakeholders, even future ones, and in virtue of these commitments they have special duties (McNaughton & Rawling, 2006). For instance, it might be the case that a tourism company could invest in a lucrative massive ski and residential development but especial commitments to the local community among other stakeholders restrict its freedom to do so. On the other hand, there was also a utilitarian tone in the documents of the regional authorities that portrayed sustainable development in terms of the utility that a socially responsible and environmentally friendly approach to tourism may bring to the region as a whole. This way of thinking, which is rooted in the utilitarian approach to ethics, follows the principle expressed by Rawls (1982: 176) that the good is prior to and independent of the right. Despite contradicting deontological thinking, this principle also seems to play a key role in the sustainability discussions taking place at the governmental level. In line with Rawls (1971; 1982), it can be assumed that tourism companies and other stakeholders are expected to put aside their own aims, interests and preferences in order to promote the common interests of the whole region.

The group of entrepreneurs did not need to make major changes in their programme in order to address the understanding of sustainability found among local community members and regional authorities. Their businesses and tourism programme under evaluation made indeed allusion to the idea of respecting the right of future generations and promoting the well-fare of the region. For instance, their concerns for employees' well-being, respect for local traditions and nature represented a clear contribution to the sustainability objectives defined at the local and regional level. In this sense, the entrepreneurs realized that they need to communicate their vision of sustainable development by adapting it to the prevailing regional sustainability discourse. In collaboration with the evaluator, they worked towards a plan to make their beliefs and values more explicit in their communication strategy. In that way, they

were able not only to address the concerns of the local community but also to be considered by the local authorities as active promoters of sustainable development.

#### *Improving product development skills through a better understanding of sustainability*

By increasing awareness of sustainable development, the group of entrepreneurs improved considerably not only their ability to follow and participate in the sustainability discourse surrounding their business activities but also their skills in designing service offerings according to their stakeholders' views of sustainable development. The virtuous character of the entrepreneurs, which was at the core of the tourism programme, became thus the source for customer care and satisfaction. Indeed, in contrast to green and ethical consumers, mainstream consumers seem to be mainly interested in the personal benefits they can get from environmentally friendly and socially responsible products and services. On the other hand, the establishment of a link between the tourism programme and the idea of future generations contributed to a greater acceptance and acknowledgment of their entrepreneurs among the local community. Also other local entrepreneurs expressed interest in co-operating with the group of entrepreneurs in order to develop other similar sustainable tourism programmes. Furthermore, the broader understanding of sustainable development helped the entrepreneurs to situate their tourism programme within the sustainability discourse promoted by the regional authorities. Thereby, the entrepreneurs were in a better position to apply for funding aimed at promoting sustainable tourism at the regional level. As a whole, it can be argued that these group of entrepreneurs gained insights into sustainable product development by learning to identify the many faces of sustainability and to address them effectively in their service offerings.

## **5 Implications for sustainability evaluation**

One way to improve the effectiveness of sustainability evaluation is to promote mutual knowledge building rather than maintaining separation between evaluators and practitioners. The complexity and multidimensional nature of sustainable development requires evaluators to assess sustainability initiatives dynamically through ongoing interaction and relationships with practitioners. It is in this sense that the evaluator should assume responsibility for launching and participating in a collaborative learning process that help participants to produce new understanding of sustainability as well as to link it to their everyday life. The collaborative construction of knowledge seems indeed to play a key role in generating social accounts and increasing commitment to sustainability evaluation results. In line with Cook (2006), Reason and Bradbury (2001), we have argued in this paper that action research has much to offer as an evaluation methodology that promotes collaborative knowledge creation through a process of action and reflection. Especially in the context of this evaluation, it contributed to engage a group of entrepreneurs in creating a better understanding of sustainable development and thus in translating it into action. In addition to assessment, as Hardi and Zdan (1997) emphasized, learning is also a key component of sustainability evaluation. Action research, as an evaluation approach, allows evaluators not only to assess success and failure of sustainability endeavours but also to improve those endeavours as they are implemented (see Edelenbos & van Buuren, 2005).

At the same time, we also recognize two main limitations in this study. First the strong focus on entrepreneurs and second the emphasis on visualization as one particular component of the Bellagio principles. While this evaluation includes four different stakeholder groups (entrepreneurs, customers, local community members and regional authorities), only one stakeholder group (entrepreneurs) was fully involved in the evaluation process. We believe, however, that the involvement of this single stakeholder group contributed to illustrating the application of action research within the field of sustainability evaluation. On the other hand, despite given particular attention to the establishment of a vision of sustainable development, the sustainability evaluation process described here offers insights into the role of action research in facilitating the operationalization of other components of the Bellagio principles

such as participation, actualization and presentation of evaluation results. Though this evaluation did include neither measurement criteria nor indexes, we believe that action research can contribute to designing assessment contents, which are relevant to the different stakeholders involved.

Also the fact that this evaluation focuses on a small-scale product development process could be seen as a limitation. Indeed, the reader may ask whether this action research-based approach could be applied in a different empirical context (e.g. large-scale programme, public sector). As the case presented here is unique, the results and experiences from it cannot be transferred to other contexts. However, the set of ontological and epistemological premises, on which this evaluation approach is based, can be used in different sustainability evaluation contexts. Hence, we suggest applying this action research-based evaluation approach to settings with different conditions and a greater variety of stakeholder groups. Such studies would not only further enrich our understanding of sustainability evaluation as a learning process, but also contribute to a more effective application of the Bellagio principles.

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