

## **C4D: Holistic**

### **Context; systemic; boundaries; inter-connections**

Taking a holistic approach means considering the systems, structures and contexts within which people operate. This means seeking to understand the broader contexts and inter-connections between organisations, groups and individuals involved in a C4D initiative (directly or indirectly). This might include the different 'communicative ecologies' (or communication contexts) that people experience.

### **Where do we start**

The define and frame sets of tasks can be useful for thinking about a holistic approach. While it is important to define the scope of R, M&E, it is important not to focus too narrowly on the separate parts of an initiative, but instead to view the C4D and related initiatives within broader systems.

A key moment to ensure you are taking a holistic approach to R, M&E is when you [Specify the key questions](#)

### **Incorporating and implementing systems thinking in practice**

#### **Manage (and commission) an evaluation or evaluation system**

##### Define ethical and quality standards for R, M&E:

Our expectations and perceptions of quality and ethics is culturally bound. In seeking agreement on quality and ethical standards it is important to understand these in the context of social, cultural, and organisational systems.

##### Develop R, M&E capacity:

It is important to take a whole of system approach to capacity development of C4D R, M&E. It can be useful to consider:

- What type of capacity development is needed, for whom, and at what level?
- How can capacity development be most effectively built into the activities of our organization and its R, M&E systems and processes?
- How will R, M&E capacity be sustained, especially if key staff leaves our organization?

### **Define**

##### Identifying potential unintended results:

A holistic approach requires that we keep an eye on the wider context, which is important for identifying unintended results. Ethnographic and Ethnographic Action Research approaches can be useful for understanding why something has, or has not, happened through immersive and open-ended research that seeks to situate an event, activity, thing, or group within a broader relational context.

### **Frame**

### Specify the key questions:

C4D initiatives usually respond to problems strongly connected with different social, cultural, economic, political, geographic and structural contexts. This means that in C4D R, M&E it is important to ask questions about underlying causes and social, cultural economic, political, geographic and structural contexts - from the situation analysis right through to the monitoring and evaluation.

### Determine what 'success' looks like:

A holistic approach to this task encourages us to think about how the context influences the definition of success, values, aspirations and perspectives. It can be useful to seek ways to define holistic visions of success, beyond indicators and targets (i.e. in Results Frameworks) which often only show a single dimension of success.

## **Describe (to answer descriptive questions)**

### Use measures, indicators or metrics:

Indicators are concise, partial, aggregates of information. This is the opposite of holistic, in-depth information. Indicators can be used to 'indicate' areas that might need further, more in-depth, investigation (e.g., negative and positive outliers or lack of change where you expected to see change). Indicators should be used in combination with other more holistic methods to deeply understand situations.

### Collect and/or retrieve data:

If your key questions set out to explore contextual factors, the methods you chose to answer the questions need to be the type that helps you construct 'thick descriptions' (comprehensive, in-depth, contextual).

### Manage data:

Paying attention to a whole system can require multiple methods, and so you need an appropriate way to manage the R, M&E data. Thinking about and analysing the data together can help you to consider the focus of the R, M&E within the broader context.

### Combine qualitative and quantitative data:

Combining qualitative and quantitative data enables different paths into understanding the context. Combining data from different methods gives a more rounded, more holistic view of a context.

## **Understand causes (to answer questions about causes and contributions)**

When Investigating Causal Contribution and Attribution:

- Strategies based on creating a counterfactual are often not suitable because they distort how the intervention might work in the 'real world' contexts.
- Strategies to check that the results support causal attribution are more sensitive to context and interconnections.
- Strategies for investigating possible alternative explanations are important for challenging and problematising assumptions as part of a holistic approach.

## **Synthesise**

When [generalising findings](#) it is important to identify what the key social, political, economic, cultural and other systemic factors were, in that specific place and time, that affected whether it worked. This will help to predict what factors will need to be considered in other contexts.

## Challenges and strategies

### Institutional barriers

There can be institutional and other barriers to holistic approaches to framing and implementing R,M&E. For example, large or joint programs sometimes get segmented and delegated to different partners, losing the holistic frame.

Use the [Understand and engage stakeholders](#) task as the basis for thinking about how to bring stakeholders together.

These management processes can be used in other tasks such as:

- [Determine what 'success' looks like,](#)
- [Check the results support causal attribution\(strategy 2\)](#)
- [Generalise Findings](#)

in in order to bring cohesiveness and systems thinking to these tasks.

### Resourcing

There can be a tension between being holistic and being realistic. For example, methods that are strong in terms of their ability to gain rich contextual understandings, such as Ethnographic Action Research, pose real challenges for tasks like [Manage Data](#) and [Analyse data](#).

Use the [Determine and secure resources](#) (and revisit as necessary) task to develop a clear picture of financial resources, capacities and time. The pages on the [Manage Data](#) and [Analyse data](#) tasks include advice for making these processes as realistic as possible.

Other advice on shoestring methods are included as part of [C4D: realistic](#).

## Resources

- [Ethnographic Action Research Toolbox](#)

Ethnographic Action Research is an methodology that was developed to link action research with ethnographic approaches as a way to build in holistic research alongside implementation of C4D. The online EAR Training Handbook includes practical guidance and examples for using EAR methods such as communicative ecology mapping, semi-structured interviews, short questionnaire surveys, and participant observation. The 'Dealing with EAR Data' section includes guidance on analysing 'messy' data.