Guide for DEAR Project Implementers

Monitoring, Evaluation, Accountability and Learning

DEAR
DEVELOPMENT EDUCATION AND AWARENESS RAISING

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Tens of people participated in the collective drafting and revision of this Guide on behalf of: DG INTPA, the Results-Oriented Monitoring Team (ROM), DEAR project implementers, GENE, Concord Europe, PLATFORMA, the Angel Network, CSOs, Local Authorities, academia, and other DEAR stakeholders.

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Overview of main images, graphs, and tables:

Abbreviations

ANGEL	Academic Network on Global Education & Learning
AEA	American Evaluation Association
CONCORD Europe	European Confederation of Relief and Development NGOs
CSOs	Civil Society Organisations
DEAR	Development Education and Awareness Raising
DG INTPA	The Commission's Directorate-General for International Partnerships
DST	DEAR Support Team
EADI	European Association of Development Research and Training Institutes
EC	European Commission
EES	European Evaluation Society
ESD	Education for Sustainable Development
EU	European Union
EU MS	European Union Member States
FAIR data	Findable, Accessible, Interoperable and Re-usable
GCE	Global Citizenship Education
GDPR	General Data Protection Regulation
GENE	Global Education Network Europe
ICCS	International Civic and Citizenship Study
ICT	Information and communications technologies
IDEA	Irish Development Education Association
IFAD	International Fund for Agricultural Development
IL	Intervention Logic
IPDET	International Program for Development Evaluation Training
LAs	Local Authority
LGBTQ+	Lesbian, gay, bisexual, transgender, queer (or sometimes questioning), and others
M&E	Monitoring and Evaluation
MEAL	Monitoring, Evaluation, Accountability and Learning

MFA	Ministry of Foreign Affairs
MoEdu	Ministry of Education
NDICI	Neighbourhood, Development and International Cooperation Instrument, Called also 'Global Europe'
OECD/DAC	Organisation for Economic Co-operation and Development - Development Assistance Committee
PCSD	Policy Coherence for Sustainable Development
PISA	Programme for International Student Assessment
PLATFORMA	European coalition of towns and regions, their national, European and global association, active in decentralised cooperation
PR	Public Relations
PRAG	Practical Guide
Q&A	Questions and Answers
RACER Indicators	Relevant, Accepted, Credible, Easy and Robust
RAs	Regional Authorities
ROM Team	Results Oriented Monitoring Team
SDGs	Sustainable Development Goals
SMART Indicators	Specific, Measurable, Achievable or Accepted, Relevant or Realistic, Time-bound
SPICED Indicators	Subjective, Participatory, Interpreted and communicable, Cross-checked, Empowering, Diverse and disaggregated
TALIS	Teaching and Learning International Survey
TIMSS	Trends in International Mathematics and Science Study
TOR	Terms of Reference
UN	United Nations
UNDP	United Nations Development Programme
UNEG	United Nations Evaluation Group
UNESCO	United Nations Educational, Scientific and Cultural Organization

> Establishing systematic M&E is not about simply introducing some new procedures – it is about establishing a culture, a way of thinking where reflection and learning become part of the everyday way you work. It is more about how we think, not what specific techniques we use.

Anne Garbutt

in *Monitoring and Evaluation: A Guide for Small and Diaspora NGOs*

How to read this Guide

This document provides guidance to the EU Development Education and Awareness Raising (DEAR) project lead partners, direct grant recipients, partner organisations, sub-grantees, and evaluators of DEAR Monitoring, Evaluation, Learning and Accountability (MEAL). The main rationale behind a shared MEAL framework is to ensure a common understanding of DEAR Programme achievements.

Recommended reading for **potential DEAR Programme applicants**

Location	Rationale
Chapter 2	To learn about DEAR Programme logic and Core DEAR indicators, as this influences your Project Logical Framework
Chapter 3	To be able to design your project as per the specifications of the DEAR MEAL Framework
Chapter 4	For tips on project planning
Annexes A.1, A.2	For a step-by-step guide to Core DEAR indicators and the DEAR Engagement Pyramid, as this may influence your project intervention logic (Theory of Change) and Project Logical Framework
Annex B.6, B.7	For templates on stakeholder analysis and risk assessment

Recommended reading for **DEAR project managers** and **internal MEAL coordinators**

Location	Rationale
Chapter 4	To go through the project after you sign the contract with the EC and during project evaluations and planning sessions
Chapter 3, 5, 6, 7	For support in developing your project-specific MEAL framework and processes
Annexes A.1, A.2	For a Step-by-Step Guide to Core DEAR indicators and the DEAR Engagement Pyramid, as this may influence your data collection

Recommended reading for **DEAR project evaluators**

Location	Rationale
Chapter 5, 6, 7	For developing the evaluation approach and methodology
Annexes B	For Templates of: Evaluation Terms of Reference, Inception Report, Project Evaluation Report, and Project Evaluation Quality Assessment Grid

To **direct grant implementers**[1], we recommend reading all chapters and discussing with the EC on how to tailor your MEAL framework.

[1] Direct grants are non-competitive allocations of funds decided by the EC to support specific actions considered ‘flanking’ measures.

Chapter 1

Introduction

In 2021 the EU Development Education and Awareness Raising (DEAR) Programme, managed by the European Commission's DG INTPA, initiated a participatory process to revise and strengthen the **Programme's Monitoring, Evaluation, Accountability and Learning (MEAL) system**. The DEAR Support Team, the Results-Oriented Monitoring Team (ROM), DEAR project implementers, and other stakeholders identified the main features of the new framework: *transparency, coherence, and a holistic approach, but also adaptability, simplicity, applicability to different DEAR stakeholders, and support to learning and innovation*. A year-long consultation process resulted in the publication of this Guide.

This document provides guidance, especially to DEAR implementers (including direct grant recipients), their partners, grantees and internal and external evaluators about DEAR Monitoring, Evaluation, and Learning, as well as upward and downward accountability (MEAL).

The Guide should help DEAR implementers assess their project achievements, successes, shortcomings, beneficiaries, impact, and assist them in planning further work. The Guide also offers monitoring and evaluation as opportunities to engage in meaningful conversations with DEAR project constituencies and other stakeholders.

The MEAL framework is not meant to be exhaustive but focuses on the specifications of the DEAR Programme. The Guide also provides resources for further learning. It is expected to be revised regularly based on user feedback. Enjoy the reading and let us in the DEAR Support Team (**reporting@dearprogramme.eu**) know how we can further support you.

Chapter 2

DEAR Programme, 2021 – 2027

Current and future generations face unprecedented and interconnected global challenges, be they environmental crises or rising inequalities, in an increasingly interconnected world. The DEAR Programme inspires and empowers people in Europe to take personal and collective actions to address global issues of social, economic, and environmental development.

WHERE TO LEARN MORE

- ANGEL (2021). Global Education Digest 2021 provides a comprehensive review of the literature on Global Citizenship Education (GCE) in 8 European languages.
- J. Arbeiter, M. Bučar (2021): Transformative Education: Bridging Education for Change, Bridge 47.
- R. Suša (2021): Global Citizenship Education (GCE) for Unknown Futures: Mapping Past and Current Experiments and Debates, Bridge 47 project.
- T. Čajková (2021): Why is transformative education a vital response to the multiple challenges of the future?, Bridge 47.
- North-South Centre of the Council of Europe (2019) - Global Education Guidelines - Concepts and methodologies on global education for educators and policy makers. See The Reference Framework of Competences for Democratic Culture, its descriptors and guidance how to use them in MEAL.
- Ilze Saleniece (2018): How much do we care? by CONCORD Europe, chapter 1 General overview and analysis (p. 11-36). Including possible learning outcome indicators.

- Global Learning in Subject Teaching. Framework and toolkit (Global Issues - Global Subjects Project 2020) in 9 languages.
- Online self-eLearning course on Global Education by the North-South Centre of the Council of Europe - see the concept, methodologies and self-learning assessment.

2.1 Key Stakeholders

The Programme is managed by the European Commission's Directorate-General for International Partnerships (DG INTPA), with the assistance of the DEAR Support Team (see detailed roles and responsibilities in chapter 3).

The key DEAR stakeholders include civil society organisations (CSOs), local authorities (LAs), preschools, schools, universities and nonformal educational providers, research institutions and individual scholars, national governments and international organisations (EU, UN, other), political parties including their youth branches, media outlets and media workers, the business sector (including social enterprises and social economy entities), people in Europe and in countries and institutions across the world. Networks, platforms, or associations of (multiple) actors above are also considered to be important actors. A detailed list of key stakeholders and their roles is available in Annex B.2.

2.2 Assumptions

The DEAR Programme Intervention Logic (IL) is based on the following assumptions.

DEAR ASSUMPTIONS

1. Policy dialogue: Spaces for multi-stakeholder dialogue exist and facilitate GCE and Sustainable Development policy advances, exchange of practices, and cross-fertilisation of both concepts.
2. Basic capacities: People and organisations have at least basic capacities to address sustainable development.
3. Learning environment: An enabling learning environment exists, including safety, engagement, connectedness, support, etc.
4. Financial and non-financial support: Timely and predictable financial and non-financial support of DEAR initiatives are in place, including for innovation.
5. Conceptualisation: Sustainable development is intended with its social, cultural, economic, political, and environmental implications and is aligned with GCE.

2.3 Objectives and Intervention Logic

The Calls for Proposals, published on the INTPA Call for Proposals and Tenders website, may slightly differ in their objectives and priorities. Nevertheless, the DEAR Programme is expected to work in three areas, namely:

1. Awareness raising, campaigning or informal learning

2. Formal and Nonformal Education

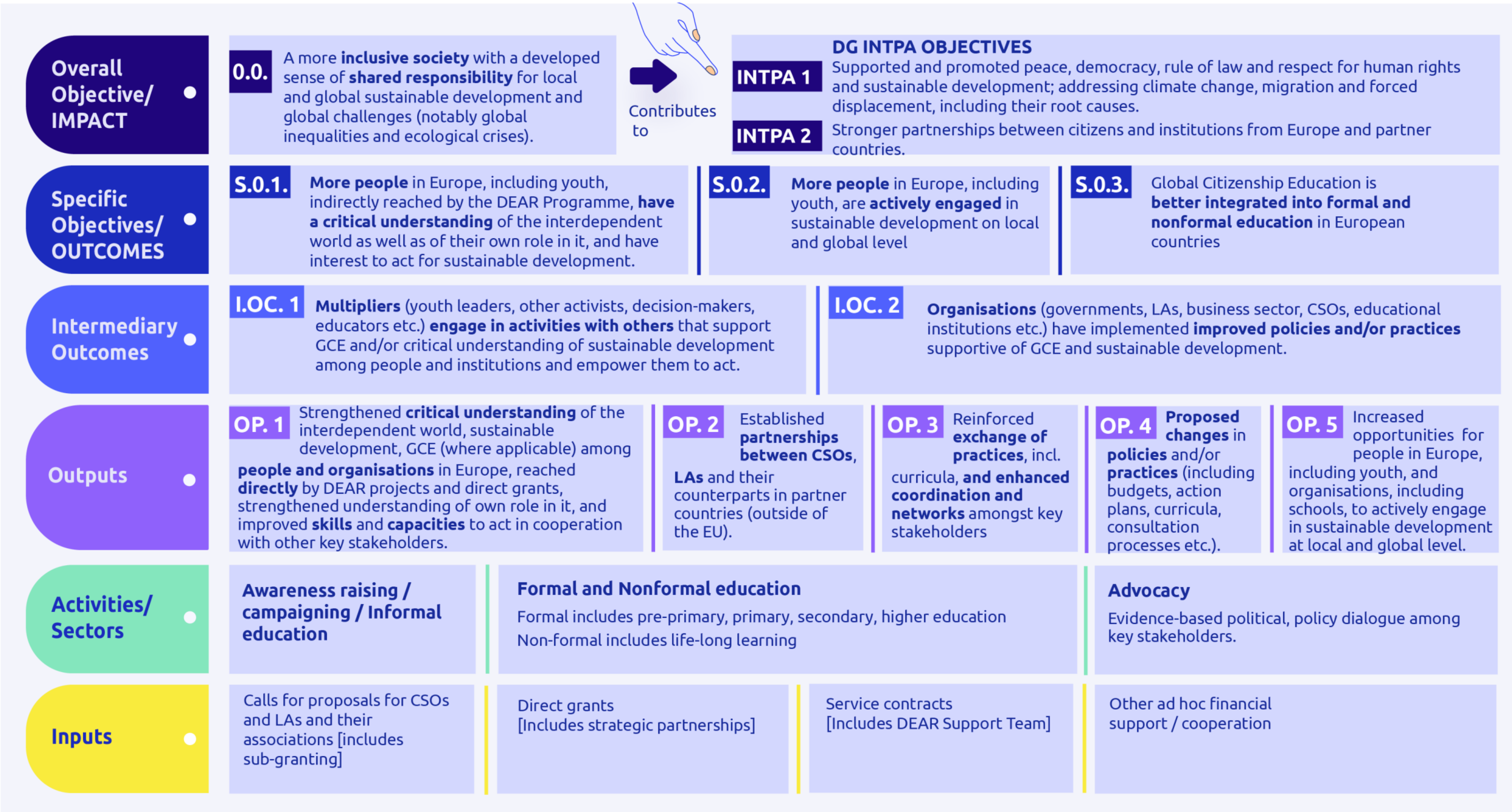
3. Advocacy.

Results of activities in these areas (outputs, intermediary outcomes, impacts) are depicted in the Intervention Logic on the next pages. **Each input contributes to all types of activities; activities may produce several, if not all, outputs and contribute to different outcomes and impacts**. All results are expected to contribute to the Programme's overall objective of a more inclusive society with a developed sense of shared responsibility for local and global sustainable development and global challenges, notably global inequalities and ecological crises.

THE DEAR PROGRAMME FOCUS (2021 – 2027)

1. **Overarching priority**: A better-informed and more inclusive society with a developed sense of co-responsibility for sustainable development, including addressing global challenges (notably global inequalities and ecological crises).Through this approach the programme will contribute primarily to the Commission's priorities on Governance, Peace and Security, and Human Development; to supporting the vital role of civil society with regard to SDG 16 and 17; as well as to the implementation of the Joint Communication and EU Action Plan on Human Rights and Democracy 2020-2024 [cfr Thematic Programme for CSOs. MIP 2021-27].
2. **Democracy and resilience**: Respond to growing backlash against democratic, open societies. Need to strengthen (systemic) resilience.
3. **Youth**: Involve youth comprehensively in local and global sustainable development and EU external actions.
4. **Organisations**: Involve organisations (governments, local authorities – LAs, businesses, civil society organisations - CSOs, educational institutions, networks, and associations of all these entities, etc.) in local and global sustainable development and partnerships with other actors including those outside of the EU.
5. **Achieving SDGs**: Contribute to Sustainable Development Goal (SDG) 4.7 and other SDGs in a coherent way.
6. **Visibility**: Increase visibility of the DEAR Programme, Global Citizenship Education (GCE), and sustainable development.

Graph: **Indicative DEAR Programme (2021 – 2027) Intervention Logic**[2]



[2] As per the INTPA Intervention Logic template. INTPA objectives are given as per official EC documents.

2.4 Indicators

The DEAR Programme contributes to complex changes that cannot be easily quantified. In order to capture these changes, the Programme uses **both quantitative and qualitative indicators (see image below).** The indicators provide a basis for further discussion about the Programme and project results in a given context.

Table: **Types of DEAR indicators**

What	Why	Set by	Collected by
1 **Contextual indicators**	• To understand the trends related to the Programme objectives and priorities, and to respond to these adequately on the Programme and project levels.	Outside the DEAR Programme (Eurobarometer etc.)	Outside the DEAR Programme (Eurobarometer etc.)
2 **Core DEAR indicators**	• To help stakeholders understand project contributions to the overall DEAR Programme objectives and the DEAR uniqueness. • To use consolidated results as a basis for further questions and learning. • To make decisions on the project level.	DEAR Programme	All project partners
3 **Project-specific indicators**	• To allow projects to collect priority data needed to make decisions, draw lessons, or account to their stakeholders.	All project partners	All project partners

All projects are requested to collect data on core DEAR indicators (see list below and Annex A.2 for methodological notes on how to collect and analyse data related to each indicator).

Table: **Core DEAR indicators collected by implementers**

Level	Indicator	Type
Overall Objective	OO1. Extent to which the Programme contributed to significant lasting systemic, policy, social or environmental changes in the area of sustainable development.	Qualitative (framing indicator)
Specific Objectives	SO123. Extent to which the Programme contributed to significant behavioural or policy changes in the area of sustainable development among people in Europe including multipliers and among organisations who were involved with the Programme.	Qualitative (framing indicator)
Intermediary Outcome 1	IOC1. No. and % of multipliers (incl. educators), involved in projects or direct grants, newly or increasingly engaging with others in the Global Citizenship Education (GCE) and/or sustainable development (levels 5-6 of the DEAR Engagement Pyramid).	Quantitative
Intermediary Outcome 2	IOC2. No. and % of organisations (incl. schools), involved in projects or direct grants, with improved policies and/or practices supportive of GCE / sustainable development.	Quantitative
Outputs	OP1. No. of people in Europe involved in initiatives launched under the Programme (levels 2-6 of the DEAR Engagement Pyramid).	Quantitative
	OP2. No. of schools, formal and nonformal education facilities, Programmes and actors in Europe involved in initiatives launched under the Programme	Quantitative
	OP3. No. of grassroots CSOs benefitting from (reached by) EU support	Quantitative

The monitoring plan (matrix) below and in the next page further specifies how Core DEAR **indicators are to be monitored**. For further details, see the Step-by-step Guide in Annex A.2

Table: **Monitoring plan for Core DEAR indicators**

LEVEL of the DEAR Programme	WHAT indicators to monitor	WHO collects data	WHEN / how often	HOW will data be collected	WHY, i.e., how will the data be consolidated and used
Overall Objective of the Programme: A more **inclusive society** with a developed sense of **shared responsibility** for local and global sustainable development and global challenges (notably global inequalities and ecological crises).	OO1. Extent to which the Programme contributed to significant lasting systemic, policy, social or environmental changes in the area of sustainable development.	Implementer with internal and/or external project evaluators	Project end (earlier if applicable)	Pre/post evaluation design (baseline and follow-up) if possible, see below for suggested approaches and data collection methods. Reported online.	Consolidated in a database and on the DEAR / INTPA websites. The EC and projects will communicate the cases to key stakeholders. Project managers will use the data to make decisions about the project design and follow-up.
All Specific Objectives/Outcomes of the Programme	SO123. Extent to which the Programme contributed to significant behavioural or policy changes in the area of sustainable development among people in Europe including multipliers and among organisations who were involved with the Programme.	*As above*	*as above*	*as above*	*as above*
Intermediary Outcome 1: Multipliers (youth leaders, other activists, decision-makers, educators, etc.) engage in activities with others that support GCE and/or critical understanding of sustainable development among people and institutions and empower them to act.	IO1. No. and % of multipliers (incl. educators), involved in projects or direct grants, who with others in GCE and/or sustainable development (levels 5-6 of the engagement pyramid).	*as above*	Project start if applicable, annually	*as above*	*as above*

LEVEL of the DEAR Programme	WHAT indicators to monitor	WHO collects data	WHEN / how often	HOW will data be collected	WHY, i.e., how will the data be consolidated and used
Intermediary Outcome 2: Organisations (governments, LAs, businesses, CSOs, educational institutions, etc.) have implemented improved policies and/or practices supportive of GCE and sustainable development.	IO2. No. and % of organisations (incl. schools), involved in projects or direct grants, who newly or increasingly engage in sustainable development and/or GCE.	*as above*	*as above*	*as above*	*as above*
Outputs 1–2–3	OP1. No. of people in Europe involved in initiatives launched under the Programme (levels 2-6 of the engagement pyramid).	*As above*	Annually	Desk review of evidence, observation, others as per the project. Reported via an online form (see below).	To show the size of the DEAR Programme to key stakeholders on the Programme and the project levels.
	OP2. No. of schools and nonformal education facilities and programmes in Europe involved in initiatives launched under the Programme.	*As above*	Annually	*As above*	*As above*
	OP3. No. of grassroots CSOs benefiting from EU support.	*As above*	Annually	*As above*	*As above*

Other indicators may vary per project, therefore only examples are provided, both in relation to context indicators (Annex B.4) and project-specific indicators (Annex B.5).


LET'S
CHANGE

Chapter 3

The new MEAL framework

The DEAR Programme MEAL framework has a **twofold purpose**:

top-down, horizontal, and bottom-up accountability

To communicate the DEAR Programme's contributions and uniqueness to high-level policy makers as well as to partners and citizens, increase their support and participation;

learning and adaptation

To help DEAR stakeholders learn what works in achieving DEAR objectives and how, as well as what does not work and why in order to adapt the Programme.

3.1 Principles and aspirations

Following key principles and long-term aspirations for the MEAL framework were discussed among a wide range of DEAR stakeholders.

KEY PRINCIPLES and ASPIRATIONS OF THE MEAL FRAMEWORK

See how they are operationalised in Annex B.3

- Coherent, holistic, systemic, long-term, participatory approach
- Adaptive, focused on qualitative changes
- Flexible, simple, cost-effective, and applicable
- Transparent
- Promoting GCE (DEAR) Quality
- Supporting learning and innovation
- Linking to INTPA / EC priorities

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Ethics and Quality

Ethics and quality are pivotal to the DEAR MEAL framework. **Key principles include:** integrity, honesty, respect for MEAL stakeholders´ rights, their diversity (the fair representation of different voices and perspectives), autonomy, dignity, privacy and confidentiality, their meaningful engagement, transparency, maximising benefits at systemic, organisational and programmatic levels and minimising costs and risks, as well as doing no harm, promoting impartiality, credibility, usefulness, fostering empowerment, inclusiveness and the rights-based approach beside others.

The DEAR (monitoring and) evaluation is undertaken with integrity and honesty. Project staff commissioning evaluations, evaluation managers, and evaluators respect human rights and differences in culture, customs, religious beliefs, and practices of all stakeholders. Evaluators are mindful of gender roles, ethnicity, ability, age, sexual orientation, language, and other differences when designing and carrying out an evaluation.

TIPS FOR **ETHICAL CONSIDERATIONS**

- Obtain informed consent from all stakeholders involved in the MEAL for storing personal data (mention what data you will store, how, for how long and for what purpose in line with the General Data Protection Regulation – GDPR). E.g., you may want the full name and email addresses of all workshop participants to be able to include them in a follow-up survey 6 months after the workshop.
- Consider national laws when involving children and vulnerable adults in evaluation e.g., you may need consent of their guardians before you involve them in the evaluation.
- Ensure that stakeholders are not pressured to take part in the MEAL and are not disadvantaged in any way if they agree to take part.

- If possible, share and discuss evaluation reports in a reasonable time with those who contributed to data collection. Share both achievements as well as things that did not go well and their reasons, in order to support learning.

  E.g., share key workshop evaluation findings and managerial response with all participants shortly after the workshop. Beside others, this may increase the likelihood that they respond to any future survey.

  See resources below and chapter 3 on accountability and learning, and chapter 7 on communication of this Guide for more tips.

READ MORE ON **EVALUATION ETHICS**

- Ethical aspects published by the European Support Service at Capacity4dev.
- The United Nations Evaluation Group (UNEG)´s (2020) Ethical Guidelines for Evaluation operationalise integrity, accountability, respect and beneficence, see checklists for those who organise evaluations.
- The Development Assistance Committee (OECD/DAC) Quality Standards for Development Evaluation (2010, second edition) with clear standards and tips applicable for DEAR.
- Evaluation Standards of National and Regional Evaluation Societies listed by the European Evaluation Society (not fully updated)
- American Evaluation Association (AEA): Guiding Principles for Evaluators
- International Program for Development Evaluation Training (IPDET), Evaluation Ethics, Politics, Standards, and Guiding Principles, Training Module 14
- Better Evaluation Principles

Implementers and evaluators are encouraged to discuss how to monitor and strengthen **DEAR/GCE quality** in their specific project with the involvement of different stakeholders. So far, DEAR projects used either self or peer assessments. Some also applied national GCE quality standards. Some project external evaluations also addressed these aspects.

READ MORE ON **DEAR/GCE QUALITY STANDARDS AND PRINCIPLES**

- The Code of good practice by the Irish Development Education Association (IDEA) covers DEAR/GCE implementation across an organisation
- Heads Up by Vanessa Andreotti (2012) provides a list of common problems with campaigns and educational initiatives that gloss over the complexities of global issues.
- A. Darnton, M. Kirk (2011): Finding Frames: New ways to engage the UK public in global poverty is a ground breaking report from BOND. It offers beside others a set of values that can motivate people to tackle a range of 'bigger than self' problems, including the environment and global poverty.
- The Frame, Voice, Report Toolkit (2021) provides e-courses and materials for CSOs who want to improve their communications, increase their outreach, or better engage their audiences. A printable version is available here.
- Vademecum for responsible international information for media / journalists by the DevReporter Network
- T. Crompton, N. Weinstein (2015): Common Cause Communication: A Toolkit for Charities for fundraisers and campaigners. It introduces values and frames and highlights how campaigns can engage and strengthen specific values.
- Ask your national DEAR platform, CONCORD Europe (for CSOs and their associations) and/or PLATFORMA (for LAs and their associations) for relevant resources on DEAR/GCE quality.

TIPS FOR **ACTIONS THAT CAN HELP YOU ENHANCE QUALITY IN DEAR/GCE**

Discuss with your partners and ideally also with participants the priority DEAR/GCE quality standards, principles or criteria you wish to reflect in your project. See resources above and consider following actions beside others:

- identify links to social and gender justice, climate justice, human rights, fairness, equity
- Reflect different knowledge systems, experiences, and perspectives (in particular those of marginalised communities and groups) including people of non-European origin;
- foster empowerment among all people involved;
- foster (equal) partnerships;
- explore global and local interconnectedness and the structural / root causes and context of the issue(s);

- use constructive and transformative frames that contribute to social change (the Frame, Voice, Report! Toolkit, pages 15 – 25, can help you analyse your frames);
- imagine and explore feasible solutions beyond charity and humanitarian-only approaches;
- identify links between local (in the EU as well as in partner countries) – global, intergenerational challenges, and show interconnectedness;
- reflect your communication and relationships with media and journalists (see Vademecum for responsible international information);
- actively and consistently support reflection and learning;
- apply GCE-specific principles, approaches, and methodologies in educational settings (e.g., co-creation, critical thinking, participatory/cooperative, transformative, peer learning), consider innovations;
- build up (knowledge, skills, attitudes, behaviours) for informed, meaningful action that is collective in nature.

Finally, some countries have developed their national DEAR MEAL frameworks. An EC DEAR project needs to take them into account especially if the national funding co-finances the project.

READ MORE ON **GCE**

- L. Anderson and D. Krathwohl (2001) A Taxonomy for Learning, Teaching, and Assessing: A revision of Bloom's Taxonomy of Educational Objectives, based on R.W. Morshead (1964) ' p. 164–170
- See more resources in Chapter 2.

READ MORE ON **MEAL Guides**

- UNDP (2009) Handbook on PME for Development Result
- I. Guijt and J. Woodhil for IFAD (2002): A Guide for Project M&E, Managing for Impact in Rural Development
- INTRAC: M&E Universe, a crossroad for different MEAL elements and O. Bakewell (2003) Sharpening the Development Process: A Practical Guide to Monitoring and Evaluation: Praxis Guide No. 1 by INTRAC
- L. Haylock and N. Rotbah (2019): Feminist Monitoring, Evaluation, Accountability and Learning by Oxfam Canada

3.1 Accountability

DEF

ACCOUNTABILITY makes all concerned DEAR project staff and partners accountable to those directly and indirectly involved in the project, including donors and other relevant DEAR stakeholders.

Accountability gives voice to the marginalised, and to those without access to decision-making processes, allowing them to influence decisions that concern them on the level of actions, projects, or policies. Project staff can thus better understand the needs of stakeholders, improve relations with them, reduce harm and demonstrate project quality and contribution.

Accountability mechanisms usually include:

- **complaint-handling mechanisms and anonymous feedback** opportunity for all involved, including marginalised people. Project partners use this feedback to adapt the project. Whenever ethical values are not being met, project management makes decisions about project design, administration or even staff changes;
- **tailored feedback from project partners / managers** back to the directly involved people / institutions and other key stakeholders about the project or its components (*e.g., summary of feedback from workshops to its participants and suggested ways forward, narrative project reports to the EC etc.*). Communication formats and channels are further described in Chapter 7 on dissemination;
- **information sharing, consultation, and participation of stakeholders** in project design, implementation, and evaluation. See participatory approach in paragraph 3.2 Learning, and output dissemination in Chapter 7.

Example: *A DEAR project trained schoolteachers to embed GCE in their didactics. To support their new practice, teaching materials and toolkits were developed together with trained teachers who tested them in their classrooms and provided feedback before toolkits and learning units were finalised and circulated widely to other teachers. The ongoing feedback from participating teachers helped to adapt the project, even to emerging needs.*

READ MORE ON **ACCOUNTABILITY**

- Indikit – Resources on Feedback and Response Mechanisms by People in Need
- Programme Accountability Guidance Pack (2013) by Save the Children

3.2 Learning

The DEAR Programme provides multiple spaces for sharing knowledge gathered via MEAL, for learning and co-creation of innovative ideas among different DEAR stakeholders. The EC with the support of the DEAR Support Team provides some of such spaces.

Learning also takes place at the level of project managers, project staff, and more widely in their organisations and among stakeholders. DEAR projects usually reflect good practices and lessons learnt at partnership, sub-grantee, or multi-stakeholder meetings. They also provide space for innovation. The DEAR Support team also offer a number of learning opportunities for all project partners.

Project partners are encouraged to summarise their **good practices and lessons learnt,** e.g. in an easy-to-read booklet or a blog entry and share these among a wider group of stakeholders. Once available, such summaries can provide a rich material for further research and planning of future DEAR / GCE.

Example: The inspirational catalogue of an EU-funded sub-granting scheme includes 10 different ways 'How to Engage Citizens with the Sustainable Development Goals'.

TIPS TO **ENHANCE LEARNING**

- Agree with project partners (and ideally key stakeholders) a few main **learning questions** during project inception. The MEAL plan should include related data collection, agreed roles and timing.
- Identify **learning opportunities** across all stages of the project cycle.
- E.g., introduce After Action Reviews, retrospective, multi-actor evaluation workshops, joint dissemination of key findings and learnings / the evaluation report.

- Check the DEAR Programme website for diverse analytical and synthesis DEAR-related reports, including summaries of project evaluation and ROM reports. They can offer valuable lessons learnt for your project.
- Take advantage of the resources in the DEAR project pages (on Capacity4Dev)
- Join the DEAR Group (on Capacity4Dev) and share your resources, tips, and questions in the DEAR community.

A Participatory Approach, mentioned under the DEAR MEAL principles, is one way to empower and support learning among DEAR stakeholders. It entails the involvement of key stakeholders in the whole project cycle management. According to the analysis of DEAR projects undertaken by the ROM Team, stakeholder involvement in the context analysis and project design contributes to the elaboration of tailor-made activities responding more accurately to their needs. Through this approach, project partners secure their commitment as well as align the timing of different events and contribute to sustainable benefits. The Participatory Approach may also improve efficiency as stakeholders may use their own means towards agreed results. Above all, participation of stakeholders, including citizens, contributes to their empowerment.

TIPS FOR **A PARTICIPATORY APPROACH**

- Consider to what extent you involve (potential) stakeholders (e.g. inform, consult, involve in decision making; find more about a participation spectrum or a ladder of participation). Where possible, allow for influence rather than just involvement.
- Ask key stakeholders for their monitoring and evaluation needs during the project inception stage.
- Involve stakeholders throughout the project in planning, data collection, analysis, sense-making and decision making about the next steps (e.g., when developing learning materials, invite teachers and/or users to co-create and test them).
- Create 'advisory groups' composed of relevant stakeholder groups such as teachers, youth, journalists, businesses, LAs, CSOs, underprivileged groups and other people you directly work with. Create a system where they can continuously feed in your project monitoring, evaluation and planning and directly benefit from it. Highlight 'what is in it for them'.
- Set up, extend, or develop '(multi-stakeholder) cross-border networks' on particular causes to exchange innovative practices and build a strong commitment.
- Involve an experienced facilitator or host (see for instance Art of Hosting or Liberating Structures for key principles and methods) to create spaces for engaging conversations among stakeholders

- ✪ Consider how key elements will be 'harvested' by the group and/or external harvesters (see Art of Harvesting for graphic and other harvesting) for further use in MEAL and beyond it.
- ✪ Enjoy the process of learning!

> ***The ways we engage and relate are often more important than the imagined goals we are trying to achieve.***
>
> Bridge 47

READ MORE ON **PARTICIPATORY PROCESSES**

- Suša (2021) Imagining transformation otherwise: Case studies of learning practices by Bridge 47 offers diverse approaches to social change and transformation from across the World. At the end, it presents key lessons learnt.
- The Irish Development Education Association (IDEA), Bridge 47 (2021): Building Business Partnerships for Global Citizenship Education includes key practical learning points from a training for CSOs.
- J. Arbeiter, M. Bučar (2021): Cross-Sectoral Cooperation for Sustainable Futures by Bridge 47 offers tips how to build such cooperation
- K. Wittig-Fergeson and H. J. Fricke (2021): Out of the Comfort Zone? GCE and Cross-Sector Partnerships for Sustainable Development includes nine case studies, by Bridge 47.
- INTRAC (2007) – Praxis Note 32. Learning and Accountability: A Monitoring & Evaluation Consultant's Perspective.

3.3 Roles and Responsibilities

Phase / Responsibilities	**Implementers**	**The Contracting Authority (The EC)**	**The EC supported by the DEAR Support Team**
Planning (before the submission of application)	• Review of context, stakeholders, goals, methodologies (for DEAR as well as MEAL) • Set Project Logical Framework / Intervention Logic and MEAL framework (including baselines to assess outcomes and impacts) • Whenever possible, take part in DEAR events including workshops on MEAL to improve the quality of applications, connect with others on shared topics, and co-develop their proposals (to coordinate the EU-wide efforts, scale-up any local ideas/methods and utilise lessons learnt)	• Includes the DEAR MEAL Guide with key monitoring and evaluation requirements in the Call • Promotes the call for proposals and invitations to DEAR events also involving international and national CSOs and intergovernmental networks • Provides experts for DEAR events and officially hosts the events	• Summarises and circulates key resources on EU DEAR context, stakeholders, and projects/initiatives • Promotes the call for proposals once it is launched • Co-organises (with DG INTPA) DEAR events including workshops on MEAL to improve the quality of applications, networking opportunities for potential partners to connect on shared topics and co-develop their proposals (to coordinate the EU-wide efforts, scale-up any local ideas/methods and utilise lessons learnt) • Provides expert support for DEAR events, networking, and communication activities

Inception (from signing the contract usually through the first 12 months of implementation)	• Select MEAL staff / team / expert / external company • Develop a learning strategy and plan moments for joint learning with partners • Develop a communication strategy and link it to MEAL • Update context, stakeholders, goals (Logframe / Intervention Logic), methodologies and timelines, taking into account other approved DEAR projects (synergies, duplications) • Develop detailed MEAL including stakeholder participation, relevant information systems, plans, etc. • Share MEAL approaches and tools among partners, agree common approach (with flexibility for each partner and context), jointly develop capacities and communities of practice among partners and with people directly involved in the project (as applicable) • Collect baseline data to assess outputs, outcomes, impacts (where applicable)	• Reviews approved applications, summarizes key focus areas, methodologies including MEAL, support needed • Reviews if MEAL framework and systems have reflected earlier suggestions and are in line with their purpose(s) • Engages the ROM Team in selected projects (if needed) to improve logframes and MEAL	• Provides experts and hosts inception workshop for all (old and new) projects to create synergies, coordinate, cooperate, multiply efforts, learn from each other, and support learning including specific MEAL approaches and tools • Provides spaces and facilitates networking opportunities and cross-fertilisation among funded projects • Provides ad hoc support to newly funded projects with networking, communications, and capacity-building opportunities

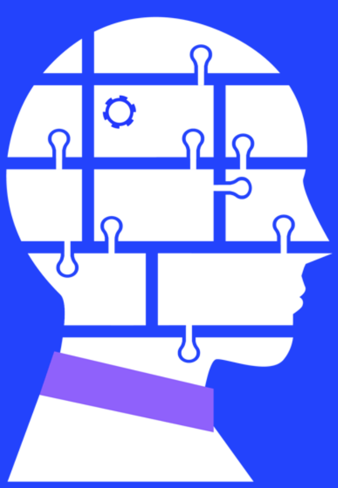
Monitoring	• Regularly collect data for MEAL and related evidence, including unintended (quantitative and qualitative) changes • Use MEAL on an on-going basis to inform the strategy and action plan • Focus on changes, regularly update values of indicators, and monitor areas as agreed by the project (relevance, sustainability, lessons learnt, innovation, DEAR/GCE quality)	• Regularly communicates with projects on their progress and any outstanding issues • Reviews Core DEAR indicators, narrative and financial project reports, provides feedback as necessary • Engages ROM in selected projects to help with project set-up or progress • Reviews consolidated ROM, project, and evaluation (synthesis) reports for key findings, lessons learnt and current needs • Communicates internally and externally key achievements as well as challenges and solutions to address these (e.g., DEAR website, INFO-POINT Conference, etc.)	• Designs and launches MEAL software that enables data collection (complementary to the EC software, if applicable) • Synthesises key achievements, challenges and current needs from Core DEAR indicators and narrative project • Supports projects on a needs-basis (via Exchange Hubs and Learning & Development Hubs, research, etc.) • Produces DEAR Annual reports to reflect current progress and key lessons learned from current projects • Produces reports from Exchange Hubs and Learning & Development Hubs, including details on progress of projects
Evaluation	• Ongoing or regular evaluation and learning (as applicable) with involvement of key stakeholders, reflecting project-specific and common DEAR evaluation criteria and questions • Evaluate key events, methodologies, processes, and outputs, shares key MEAL outputs and lessons learnt • Manage the evaluation and monitor its quality via established mechanisms (e.g., via a reference group chaired by the project lead organisation) • Conduct ex post	• Runs Programme evaluations, including ex post project evaluations if applicable and chairing the reference group in such evaluations • Participates (if possible) in midterm/final/ex post/other project evaluations • Reviews evaluation reports and provides feedback as necessary • Reflects key findings in future DEAR Programme design • Publishes evaluation reports on the DEAR website	• Conducts a meta-analysis of project evaluations to assess the process as well as to detect key changes, effective methodologies, trends, and opportunities • Organises Exchange Hubs to draw lessons learnt from evaluations and to adjust projects (and future applications) accordingly

	evaluations when possible to assess the context, long-term (sustained) changes and how they came about • Actively takes part in any evaluations funded by the DEAR Programme, prepares contact details of key stakeholders, and helps to establish first contacts, and clarifies and confirms further responsibilities • Shares evaluation outputs among key stakeholders and supports mutual learning • Uses evaluation outputs in communication, advocacy, planning		

Chapter 4

Planning a DEAR project

Good planning is the first and an essential step in any project. It helps to align on the key project elements among project stakeholders. It also helps you focus during monitoring and evaluation on what truly matters to implementers and stakeholders[3].



KEY STEPS FOR PLANNING A DEAR PROJECT

Stakeholder and context analysis

↓

Setting-up of vision and objectives, strategies development, resources

↓

Setting-up roles and processes including coordination, monitoring, evaluation, communication

↓

Financial arrangements, organisational capacity assessment

↓

Risk assessment and sustainability

The first three steps are elaborated below. Tips for financial arrangements and organisational capacity assessment are included in the EU PCM Guide. A risk assessment template is available in Annex B.7.

[3] UNDP (2009): Handbook on Planning, Monitoring and Evaluating for Development Result

4.1 Stakeholder and context analysis

Before engaging with stakeholder groups and formulating the DEAR project, it is worth exploring relevant actors, policies, opportunities, and challenges related to the core issue you want to address. Note that during the project, the core issue may be redefined.

A stakeholder analysis typically includes those involved in the project implementation, those affected by the project (or the core issue addressed by the project) and primary users of the evaluation, including policy makers.

TIPS FOR **YOUR STAKEHOLDER ANALYSIS**

- Involve different stakeholders in developing the stakeholder analysis.
- Consider different types of stakeholders AND their interrelations.
- Use existing tools, graphs, and templates, such as:
  - Power – Interest Matrix;
  - the Power – Interest – Attitude Matrix (see Annex B.6 for detailed steps);
  - Venn Diagram to picture stakeholder relationships from a set perspective;
  - Social Network Analysis maps and measures formal and informal relationships between stakeholders.
- Define, with the help of the selected tool, what role(s) stakeholders should play in the project and what are the possible actions to address their interests, attitudes, and capacities.
- Consider how you would work with voices that promote different values and messages, or that perform actions contrary to your project's objectives.

A context analysis usually includes social, cultural, political, economic, institutional, or technological factors that influence the core issue and/or the intended project.

TIPS FOR **YOUR CONTEXT ANALYSIS**

- Use **sources such as**: DEAR Call for Proposals, DEAR Programme website and Capacity4dev/dear, national GCE/DEAR strategies, DEAR country reports, previous DEAR project outputs and evaluations, national DEAR CSO platforms, Eurobarometer and other public opinion surveys, SDG Voluntary National and Local Reviews, relevant international, national or other policies, etc.
- Check **lessons learned** and review past, ongoing, and planned initiatives.
- Use a **Problem Tree** (p. 67) to picture a hierarchy of different issues. It will help you select the core issue and find links among causes and effects.

- Use a **SWOT Analysis** to analyse strengths, weaknesses, external opportunities and threats (challenges).
- Or use **alternative approaches** such as: Appreciative Inquiry, which builds on what already works rather than on 'issues', or Outcome Mapping, with a specific approach to stakeholder analysis and formulation of outcomes.

4.2 Setting up objectives, result chain and indicators

Once you have analysed the context and stakeholders, develop the project Theory of Change (or Intervention Logic) in a participatory way if possible, before filling in the Project Logical Framework.

DEF

DEFINITIONS[4]

The **RESULTS CHAIN** shows the logical relationship among invested resources, implemented activities, and the achieved changes or results of a project or a programme.

The **PROJECT LOGICAL FRAMEWORK** ('logframe') sets out what the project will do, what results it will deliver and how this will be monitored. It is a way of depicting a results chain, together with indicators, sources of verification and assumptions on which we think the project will unfold. See the standardised format in the latest DEAR Call for Proposals.

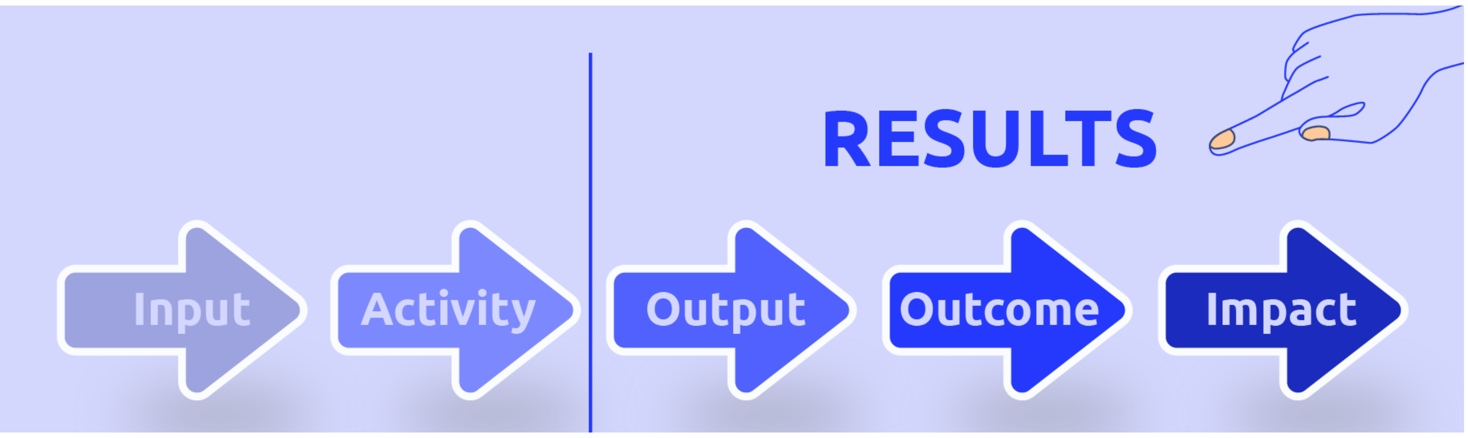
The **THEORY OF CHANGE** goes beyond this and focuses on why changes happen. It contains all preconditions for long-term changes, including those outside of the project's (or programme´s) direct control (contextual factors). Furthermore, it presents a rationale for choosing the project, assumptions for the change processes, and evidence which underpin these assumptions. Questions available at Capacity4Dev[5] may help you develop your Theory of Change.

The **INTERVENTION LOGIC** identifies what changes the project wants to help bring about in a given context, how the associated change processes might happen and why. It comprises elements of a Theory of Change and Logical Framework.

[4] ROM (2016): Logical Framework Approach and Indicators for the results measurement of projects and programs and UNDP Handbook on PME for Development Result

[5] See 'mod04_S05_LFA_indicators_HO3_PROCESS to develop an IL' and mod04_S05_LFA_indicators_HO4_IL_GenericNotes' in folder 4 of the unzipped course materials Logical Framework Approach and Indicators for the results measurement of projects and programs

Image: **Result chain and key definitions**[6]



Term	Definition	Examples
Input	Refers to provided resources.	*Funding, staff, materials, or equipment*
Activity	Refers to the process of converting inputs into outputs.	*Conducting a training or a campaign, preparing a roadmap*
Output	Describes the products, capital goods and services delivered by the project. They may also include changes resulting from the project that are relevant to achieving outcomes. Their achievement is under the project's control.	*The availability and accessibility of learning materials, the existence of enhanced skills of participants, their increased awareness as a result of activities*
Outcome/ Specific Objective	Refers to short (intermediary outcomes) to medium-term effects in the political, social, economic and/or environmental areas targeted by the project. Furthermore, they include changes in behaviours or relations of people and institutions (including policies or practices) resulting from the project outputs. They take place during or after the project implementation and their achievement is under the control of 'target groups' as well as of other actors. Primary outcomes are set as project specific objectives.	*More teachers actively engaged in the issues raised by the project*
Impact/ Overall Objective	Refers to broader changes in the political, social, economic and/or environmental global context. It is a detectable improvement in the lives of people (or in relation to the planet). They tend to be long-term and can be only indirectly influenced by the project. The key impacts are referred to as project overall objectives.	*Enhanced respect for human rights*

[6] ROM Handbook (2020)

To monitor the results above, implementers use **Core** DEAR and **project-specific indicators.** They also set **baselines as well as targets** for them.

DEFINITIONS[7]

INDICATOR is a quantitative and/or a qualitative variable that provides a simple and reliable means to measure the achievement of the corresponding result (PRAG 2020, Annex E3d).

QUANTITATIVE INDICATORS are statistical measures that measure results (a number, percentage, or ratio). Trends (e.g., increase) thresholds (e.g., min,. 30 %) or targets (e.g., strategy by the end of 2027) may be used for comparison.

Example: % of students who take action on climate change, following a workshop

QUALITATIVE INDICATORS reflect people's judgements, opinions, perceptions, and attitudes towards a given situation or subject. They can include changes in sensitivity, satisfaction, influence, awareness, understanding, attitudes, quality, perception, dialogue, or sense of well-being.

Example: Types of actions for climate change that students took within 6 months after a workshop.

Different guidelines point out that indicators should be **SMART** (Specific, Measurable, Achievable or Accepted, Relevant or Realistic, Time-bound) or **RACER** (Relevant, Accepted, Credible, Easy to monitor and Robust) or in the case of qualitative indicators **SPICED** (Subjective, Participatory, Interpreted and communicable, Cross-checked, Empowering, Diverse and disaggregated). Examples of project-specific result indicators can be found in Annex B.5. Potential applicants are advised to follow the latest definitions or results and indicators in the relevant DEAR Call for Proposals.

TIPS FOR **DEVELOPING YOUR THEORY OF CHANGE / LOGICAL FRAMEWORK**

- Engage key staff and key stakeholders.
- Start from the end: develop Objectives/Outcomes > Outputs > Activities.
- Set indicators (use common project result indicators and get tips in Annex B.5 for project-specific indicators).
- Set sources of verification.
- Check assumptions, risks, and consistency.
- Conduct baseline surveys, set milestones, and target values.
- Help all project partners work with the logical framework throughout the project.
- Revise the logical framework when needed.

[7] ROM (2016): Logical Framework Approach and Indicators for the results measurement of projects and programs and UNDP Handbook on PME for Development Result

Each action in the box above is further explained below.

ENGAGE key staff and stakeholders

- Engage the planned project staff, but also decision makers and others who can contribute to your context analysis and theory of change.
- Ideally involve key stakeholders in the key steps – do not assume you know stakeholder situations or perspectives (consider Outcome Mapping).

START FROM THE END: objectives / outcomes – outputs – activities

- Start from context and stakeholder analysis and strategically choose your partners among key stakeholders (e.g., academia, teacher training institutions, school/teacher networks, CSO or LA platforms, etc.). Consider forming local, national, and/or international (multi-actor) alliances.
- Establish your (joint) objectives and then work backwards – consider what outcomes, outputs, activities, and inputs will be needed.
- Take into account previous research, projects and evaluations as well as other interventions to build your strategy.
- Consider how key stakeholders/partners can fully participate in your projects.
- Consider how strategies need to be adapted to local contexts.
- Consider how you can feed into advocacy and systemic changes.

DEFINE INDICATORS

- Look for existing monitoring and evaluation tools and indicators in literature (SDG reports, Eurobarometer surveys, public opinion polls, etc. See also Annex B.4 for potential context indicators) for your project overall / specific objectives.
- Check examples of project-specific indicators in Annex B.5.
- Discuss indicators within your project team and ideally with your key stakeholders.
- Use both quantitative and qualitative indicators to better understand the changes that the project contributes to (e.g., *what new actions do people take after being exposed to a campaign, what forms of media have included project messages, what voices have they included etc.).*
- Check that indicators capture well the progress towards the related output, outcome, or objective (and ensure that outcome indicators relate to changes in behaviours or policies).
- Use country-specific indicators if applicable.
- Use gender indicators where required with an inclusive approach (female/male/other/prefer not to say).
- Consider when and how you will collect data (including baseline), how much resources it will entail (project staff, other stakeholders, money), how accurate (credible) it will be, whether the indicator reveals something you would not otherwise know, if it helps you make decisions about the project or account to stakeholders.

Think through **SOURCES OF VERIFICATION**

- Check that external sources of verification are reliable and accessible (e.g., *with respect to teacher training, competency assessment by peers may provide a more accurate picture than self-assessment of teachers alone but may be less accessible*).

- If you set up your own data collection tools, check if they are realistic and cost-effective: are the costs of data collection justified considering the use of the findings for learning, communication, decision making or other purposes?

Check **ASSUMPTIONS, RISKS AND CONSISTENCY**

- Check your assumptions and risks.
- Would activities, if combined, lead to desired outputs? Would combined outputs contribute to expected outcomes?

Conduct **BASELINE** surveys, set milestones and targets

- With respect to indicators, agree milestones and targets for each partner and for the project as a whole with the project team.
- Justify these values e.g., based on your baseline survey conducted before your application, literature, earlier evaluations, country context analysis, etc.
- During the initial stage, conduct **baseline surveys** or other assessments (consider focusing on knowledge, skills, attitudes, behaviours[8]) whenever applicable and make sure data is collected before your campaign or that other types of activities are launched so that they would not be influenced by your project activities. Allocate enough time and resources to such surveys.
- Consider external help (e.g., a research company that regularly conducts opinion polls to measure changed public awareness) to develop a robust evaluation design and data collection methods including baselines (e.g. an Omnibus survey can be a cost-effective option to answer your 3-4 key questions to general public, but focus groups may tap into reasons for certain behaviours or interlinks).
- See chapter 6 on evaluation for further tips.

HELP ALL PROJECT PARTNERS work with the logical framework throughout the project

- Make sure that all project team members understand the logframe, definitions of indicators, etc.
- During the initial stage of the project, select the evaluator / MEAL team that will assist you in the process throughout the project.
- During the initial stage, replan the project according to the internal as well as external changes (see DEAR Team suggestions, p. 6-7 for details). Ideally, organise an event for all project staff to make sure everyone is on the same page and can contribute to replanning.
- Find out about your audiences and others who can help you before you plan the details of activities that involve them.
- See chapters 5 on monitoring and 6 on evaluation for further use of the logical framework.

ADJUST THE LOGFRAME DURING THE PROJECT if needed

- If needed, update the logframe, including indicators and target values, in agreement with the EC Task Manager (e.g., to improve an inconsistent logframe, to respond to a changing context or to change the project design so that objectives can be reached) except of the overall and specific objectives, which should remain.

[8] OECD Future of Education and Skills 2030, Conceptual learning framework: Attitudes and values for 2030
Measuring Global Citizenship Education: A collection of Practices and Tools (2017)

- Consult informally any major changes in your logframe (or budget) with your EC Task Manager before submitting a formal suggestion. Focus on results and explain how the proposed changes will contribute to the project objectives. Check the version of the PRAG that is applicable to your project.

READ MORE ON **THIS TOPIC**

- on Suggestions for Global Development Campaigning and Education in Europe: Ideas and suggestions from EU supported DEAR Projects (2021) focusing on project proposals, planning, project management, partnerships, sub-granting, engaging citizens, communication, advocacy, MEAL, sustainability and reporting.
- Logical Framework Approach and Indicators for the Results Measurement of Projects and Programs by the ROM Team on Capacity4Dev
- The EC, DG Comm (2019): Communication Network Indicators: Supporting Guide
- Velida Dzino-Silajdzic (2020): Practical Guidance on Developing a Project's Theory of Change, Catholic Relief Services
- Rapid Guide to Designing SMART Indicators
- The blog 'What is this thing called 'Theory of Change'?' by Ann-Murray Brown, includes more examples of theories of Change.
- Guidance Notes no. 4: Logical Framework Analysis, BOND
- Using Results-Based Approaches in Global Citizenship Education Settings: A Practical Toolkit, IDEA
- Mags Liddy and Susan Gallwey (2020): The Wrong Tool for the Job? The Application of Result-Based Approaches in Development Education Learning
- UN Development group: Theory of Change, UNDAF Companion Guidance
- „Game On! A Practical Guide to Campaigning' by 'Make Fruit Fair!' offers tips how to develop and implement campaigns. See creative ideas and tools.
- INTRAC: M&E Universe, a crossroad for different MEAL elements, including a guidance on indicators.
- Articles and tools developed by the European Evaluation Service published on Capacity4Dev, check EvalCrises for resources how to adapt MEAL in crises such as Covid-19 pandemic and for lessons learnt.
- Learning Hub reports produced by the DEAR Support Team:
- 2015 Cluster Meeting report
- September 2018 'Planning Communication with External Audiences' Hub report
- October 2019 'Revisiting working in partnerships, contacting targets, and MEL' Hub report
- June 2021 'Connecting Stories' Exchange Hub report

- OXFAM (2020) Influencing For Impact Guide: How to deliver effective influencing strategies Oxford: Oxfam GB
- GREEN EUROPEAN FOUNDATION (2014) Campaign Handbook: A users' guide to campaigning, Belgium: Green European Foundation

4.3 Building a strong MEAL Team

DEAR projects apply diverse structures and processes to secure ownership of all partners, facilitate learning, decision making, and support accountability.

Projects usually have a steering committee which links country project coordinators with advisory or expert committees or thematic working groups. These, in turn, provide support in research or methodology development, amongst other contributions. Alternatively, projects apply decentralised structures, semi-autonomous groups. According to ROM, the decentralised approach to project design and implementation increases local ownership and makes the activities relevant to the national priorities. It also gives partners the possibility to adapt to the needs and capacities of local stakeholders, provided that they comply with EC contractual obligations.

In relation to MEAL, the key roles and responsibilities of implementers, the EC, and the DEAR Support Team are listed in Chapter 3. Some DEAR projects rely on external consulting companies to advise on their MEAL framework set-up and/or to conduct evaluations. The usual practice is to appoint one person from among project managers as an evaluation manager and as the main contact for external staff. Additionally, all or selected national project coordinators form a 'reference group' to feed into the evaluation during all phases. Despite the presence of an external MEAL team, monitoring and evaluation of some elements (e.g., workshops, other events, activities, processes) will usually be conducted internally.

Other DEAR projects work with a mix of internal and external MEAL teams during the entire implementation period. Such mixed or hybrid evaluations can have many different forms, as listed below. Nevertheless, an external project-end evaluation is still preferred.

- External and internal evaluators work together in the evaluation team, led by an internal or an external person.
- An external evaluator supports internal project staff to conduct an evaluation via facilitation, coaching, and technical advice when needed.
- Similarly, an external evaluator supports project participants and actors to undertake an evaluation (emancipatory or empowerment evaluation).
- An external evaluator undertakes a quality review of the evaluation conducted by internal evaluators at key milestones (e.g., evaluation design, data collection instruments, evaluation report), bringing in additional data, questions, or alternative interpretations of data, also referred to as a 'critical friend'.

Advantages of each approach are elaborated in Annex B.8 together with an example of division of roles between the project team and evaluators / MEAL advisors.

In any case, the ROM Team experience shows that it is beyond the capacities of the Project Coordinator to coordinate all MEAL tasks, supervise, and assure the quality of outputs, progress, and monitoring reports of all partners.

TIPS ON **HOW TO BUILD A STRONG MEAL TEAM?**

- Assign dedicated staff and funds for internal MEAL: collaborate with internal or external MEAL experts **from the very beginning** of the project. Include MEAL experts in drafting the project and the logical framework. Recruit internal and external MEAL staff just after signing the grant contract to jointly develop the MEAL system.
- Nominate a **MEAL expert**(s) to be a part of the **project management** team.
- Secure **sufficient budget** and **access to MEAL expertise** for all partners involved in the project. Allocate budget and time for MEAL for national project coordinators.
- **Jointly develop MEAL tools** and assess capacities of all partners.
- Further **develop MEAL capacities** of all project partners (and grantees if applicable)
- Support **collaboration** between MEAL and **finance management** staff.
- Allocate adequate time in project meetings (and grantee´s meetings) to not only discuss progress of activities but also **progress toward achievement of results**. Discuss what is (and is not) contributing to results, the reasons, and other lessons learnt.
- **Involve senior management** in MEAL and link the project to organisational learning and decision making.

4.4 Project planning checklist

CHECKLIST FOR THE PLANNING PHASE

- **Involve** key stakeholders.
- Look for **synergies** and avoid duplications.
- Agree on **responsibilities** among partners and **management structure.**
- Make a **realistic action plan,** including **MEAL and communication plans.**
- Consider **cross-cutting issues** (e.g., gender/LGBTQ+, environment, diversity, youth, and sustainability, among others).
- **Build MEAL capacities** from the beginning *(see paragraph 4.3 above).*
- Assess **risks** and plan measures in advance.
- Prepare an **exit strategy**, and plan for institutional and financial **sustainability.**
- Check that your project proposal meets the requirements in the **evaluation grid of the Call for Proposals**.

Each action in the check list above is further explained below:

CO-DESIGN your project or (as a minimum) consult key stakeholders about your plans (local authorities, CSOs, universities, schools, youth groups, business, media, networks or platforms of these actors, etc.) for example as a part of theory of change development or Outcome Mapping.

LOOK FOR SYNERGIES and avoid duplications with other projects and initiatives focusing on similar causes. Use existing national CSO or LA platforms and networks to help you identify other initiatives.

AGREE ON RESPONSIBILITIES AND THE MANAGEMENT STRUCTURE among partners as per their strengths and provide spaces for collaboration. See previous chapter for more details.

MAKE A REALISTIC ACTION PLAN, consider the plurality of partners and national contexts (e.g., teacher course accreditation), availability of key stakeholders (e.g., with respect to school year and holidays), different local languages, as well as time needed to follow EC procedures (even more if the project lead is a local authority), to monitor and evaluate the project or time to design and pilot innovative products or services. Ideally develop all plans and set priorities, including MEAL and communication with all partners and key stakeholders in each country and overall.

> ***When the campaigns are well prepared, with (a few) customised messages per target groups and local contexts, with clear and positive messages (without technical or political language) and opportunities for the target groups to act, with actions implemented with good timing, and with synergies with other actions and the media, they are successful in terms of outreach and people's mobilisation.***
>
> ROM Team, Summary of ROM review results over 2015-2019 for the DEAR Programme

CONSIDER CROSS-CUTTING ISSUES e.g., gender or LGBTQ+, environment, diversity, youth, sustainability, among others. Aggregate MEAL data along these lines if possible to be able to tailor next activities (e.g., customise messages on discrimination to all genders).

MAKE A SOUND RISK ASSESSMENT and plan mitigation measures in advance with all project partners and key stakeholders if possible. Consider country-specific assumptions and risks.

PREPARE AN EXIT STRATEGY, i.e., what needs to be done to ensure continuing benefits to people and institutions you have influenced directly and indirectly. Further, **plan for institutional and financial sustainability** – integrate outputs in your and partner organisations: strengthen partners´ capacities and ownership; help integrate outputs in partner institutions (e.g. educational materials in school curricula); secure institutional support not only of staff in charge of GCE/DEAR, but also of policy-makers to foster replication and use of project results; make outputs easily accessible (e.g., via existing networks, online databases of educational resources, etc.). Look for funding in advance to sustain availability of project outputs and benefits as well as to evaluate project impact and the (changing) context.

CHECK YOUR PROJECT PROPOSAL AGAINST THE EVALUATION GRID of the Call for Proposals.

Innovation is required if global education is to reach all and reach them well.

Quality in Global Education, An Overview of Evaluation Policy and Practice (2008)

TIPS FOR **SUB-GRANTING SCHEMES**

- If your DEAR project involves a sub-granting scheme:
- Develop capacities of sub-grantees in both DEAR / GCE quality and MEAL
- Develop guidelines for applicants including MEAL; consider their limited capacities and the need for evaluating outcomes (e.g. 6 months after completing their grant)
- Regularly monitor results achieved by sub-grants and facilitate debate on what works, what does not, for whom, how and why
- Align reporting of sub-grants with the project internal and EU reporting system
- Support mutual learning, joint initiatives, cross-sectoral partnerships, wide dissemination of results and scale-ups.

ADDITIONAL RESOURCES ON PLANNING MEAL

- Frame, Voice, Report! (2020): Global Citizenship Education – how to measure and improve the impact is a guide with tools for planning, monitoring and evaluating changes a DEAR project has contributed to, based on Outcome Mapping, The Most Significant Change stories, and Outcome Harvesting
- Measuring Global Citizenship Education: A collection of Practices and Tools (2017)
- Intervention Cycle Methodology Guide (EC, to be published) - if not published, use: Aid Delivery Methods: Project Cycle Management Guidelines (2004)
- Evaluation methodological approach on Capacity4Dev for different tools such as Problem Diagram, Objectives Diagram, or Decision Diagram
- C. Church, M. Rogers (2011): Designing for Results: Integrating Monitoring and Evaluation in Conflict Transformation Activities
- Nigel Simister (2009), Developing M&E Systems for Complex Organisations: A Methodology explains steps to develop MEAL systems, with a number of examples
- UNDP Handbook on Planning, Monitoring and Evaluating for Development Results
- BetterEvaluation.org is a knowledge platform with a full range of monitoring and evaluation activities, tools, frameworks, and systems suitable for different levels: projects, programs, policies, networks, or organisations. It also offers capacity strengthening activities
- Monitoring and Evaluation NEWS by Rick Davis

- National and international evaluation societies and networks - see list here. Enquire with them, the European Evaluation Society (EES), or the International Development Evaluation Association (IDEAS) for available learning events
- See your contractual obligations (or general contract in the Call for proposals if you are an applicant) and PRAG for key rules and templates.
- INTRAC (2014) - Sharpening the Development Process: A Practical Guide to Monitoring and Evaluation
- INTRAC (2007) - Rethinking Monitoring and Evaluation.
- INTRAC (2010) - Impact Assessment: Understanding and assessing our contributions to change.
- INTRAC (2008) - Praxis Paper 21. Participatory Monitoring and Evaluation in Practice: Lessons learnt from Central Asia
- W. Parks (2005) - Who Measures Change
- Evaluation Toolbox brings together a number of best-practice evaluation methods packaged into a comprehensive, user-friendly, how-to format
- Save the Children (2014) - Toolkit for monitoring and evaluating children's participation

Chapter 5

Monitoring

5.1 Definition, purpose, and focus of monitoring

DEF

DEFINITION

Monitoring implies a regular check by stakeholders on how an intervention is being implemented in order to identify potential problems (or opportunities) and make timely changes.[9] Monitoring entails an ongoing, systematic collection, analysis, and use of management information to support effective decision-making.[10]

DEAR project-level monitoring usually concerns:

- Progress towards results as per approved logframe and set targets (results monitoring).
- Activity implementation (e.g. all meetings with decision makers, public events, workshops, campaigns etc.) and project implementation (updated timeline etc.).
- Quality criteria and standards.
- Expenses versus available budget and co-financing (e.g. remaining funds to be raised, submitted fundraising proposals).
- OECD/DAC evaluation criteria such as:
  - Relevance (e.g. number and type of persons registered for a training or event)
  - effectiveness (e.g. feedback from trainees and/or their test results, media outputs, etc.)
  - impacts (e.g. any policy changes and their effects)
  - sustainability (e.g. courses accreditation, institutions taking own actions towards the project cause/s, subsequent funding when necessary).

[9] https://ec.europa.eu/international-partnerships/our-impact/monitoring-and-evaluation_en#header-309

[10] http://web.undp.org/evaluation/handbook/documents/english/pme-handbook.pdf https://ec.europa.eu/international-partnerships/our-impact/monitoring-and-evaluation_en#header-309

- Other key criteria such as: assumptions, risks and challenges, innovation, lessons learned, mistakes, etc.

Example: *At a regular meeting, partners monitor project indicators and discover that no primary school students have been involved in Country A. During the discussion they also discover that CSO activities can no longer be held at schools due to the Country A regulations. The project is therefore redesigned and youth in nonformal educational facilities are to be involved instead. As this change may take time, partners from countries B and C assure the consortium that they can increase their outreach so that the target for the number of students is met.*

Aside from checking project progress and informing decisions, monitoring can also identify needs and questions to be addressed by project evaluation. Furthermore, monitoring outputs are used to inform project stakeholders, both at project and Programme level, including the EC and the DEAR Support Team.

5.2 Result monitoring

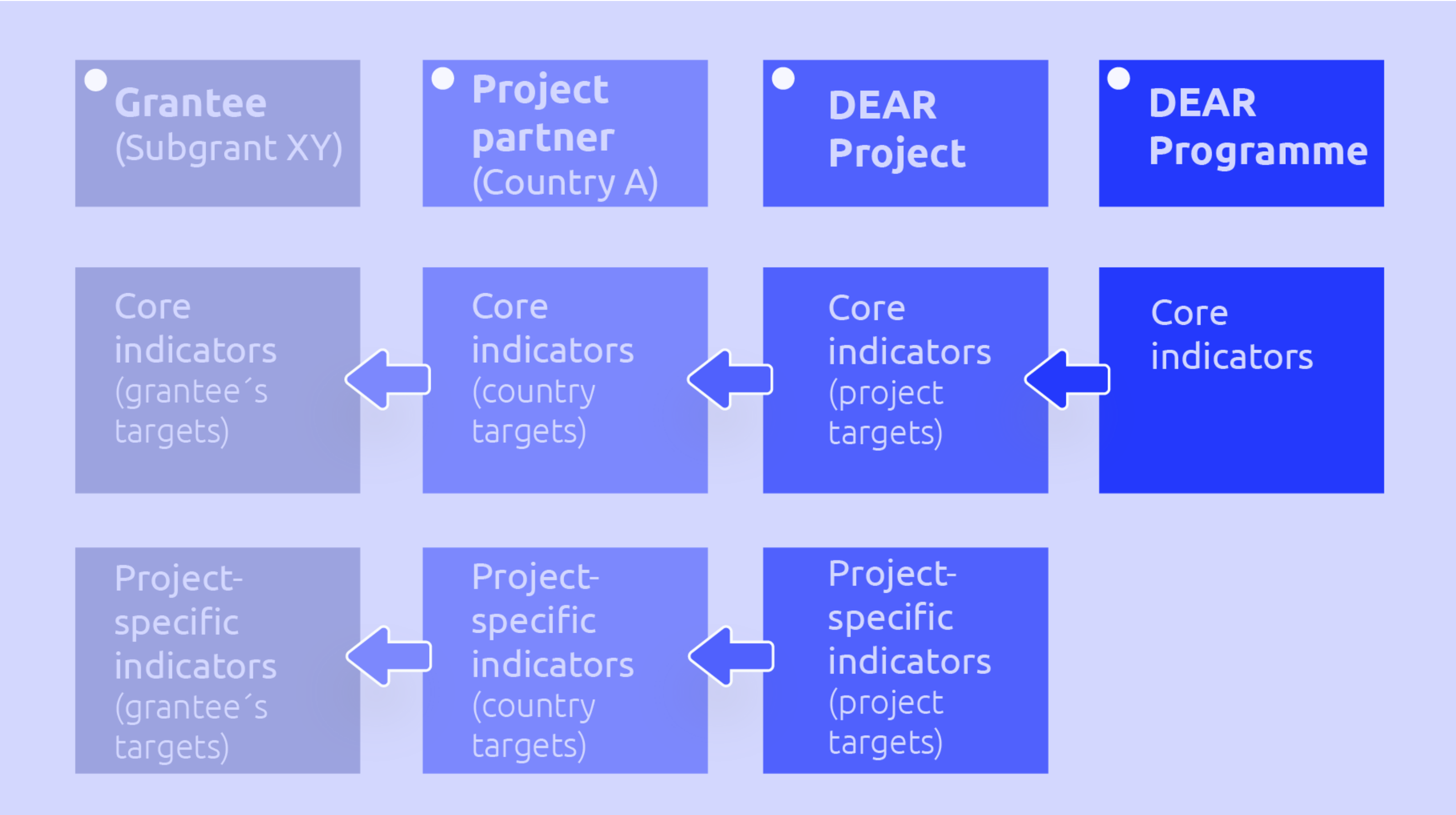
The new DEAR Programme MEAL framework has the ambition to focus more on **result monitoring** rather than monitoring progress in implementing activities. Therefore, monitoring focuses on DEAR result indicators as well as on different strategies and actions.

TIPS FOR **QUESTIONS DURING RESULT MONITORING**

- What progress are we making towards the set objectives?
- What does and does not work to achieve our objectives (results)? Why?
- How has the context changed?
- What new strategies and actions do we need to put in place to achieve results or to speed up the progress towards them?

All DEAR project consortia develop internal monitoring mechanisms that help them collect data and report on project specific and common project results from partners and (sub)grantees (see image below). Some indicators may not be relevant for specific project partners and grantees. At the same time, partners and grantees can develop specific indicators depending on their context.

Image: **Monitoring project-specific and core indicators**



Aside from internal monitoring, external **results-oriented monitoring** (ROM) may be requested for single projects by the EC. It provides an external and impartial assessment of selected DEAR projects. ROM visits are requested and organised by DG INTPA and agreed upon with project implementers.

ROM reports are made available by the EC Task Managers upon request.

ADDITIONAL RESOURCES

- **SEE MORE ON RESULT-ORIENTED MONITORING**
- Results-Oriented Monitoring on Capacity4Dev website where you can search for the latest version of the ROM Handbook.

5.3 Monitoring plan and data collection methods

Project monitoring plans usually include what to monitor, when, how, who monitors it and ideally also why, resources needed to carry out monitoring and associated risks. For a template, see page x. For further guidance for each indicator, see Annex A.2.

Data collection methods can be **quantitative** (such as surveys, observations conducted using a checklist, desk review), **qualitative** (such as interviews, focus groups, diaries, partner/stakeholder/ other meetings, case studies) or **mixed**. See suggested methodologies for collecting data for Core DEAR indicators in Annex A.2. A number of methods may even be used for small projects and sub-grants.

Methods need to be appropriate for the given indicator, for those who will use them, and for the intended purpose. They need to provide useful, reliable, and valid data with sufficient 'rigour'.

Example: *partners may require short reports from each grantee and/or conduct evaluation workshops with sub-grantees to gather the required data as well as to facilitate learning.*

Each partner then uploads achieved values for each indicator in an internal **data management system**. Data may be stored in a spreadsheet, database, or in an online data repository. Further tips on this can be found in Annex B.13. Data for different indicators may be stored in different ways. The ROM Team suggests (based on their reviews) conducting biannual and simple monitoring of progress. However, some DEAR implementers prefer real-time monitoring to have accurate data and to facilitate more timely decision making.

TIPS ON **DATA MANAGEMENT for RESULT MONITORING**

- Consider who needs what information, when and why (how they will use it).
- Consider what would be a suitable benchmark against which you would measure progress.
- Build on existing systems and resources.
- Develop a project monitoring plan: check that it is comprehensive (covering all indicators and other criteria you agree upon), proportionate (considering what is really necessary to collect) and in line with project timelines. Rather focus on fewer but more in-depth elements.
- Develop specific guidelines and formats for data collection (e.g., interview guides, observation checklists, workshop outlines).
- Devote sufficient resources and time to developing a shared understanding among those who will collect or analyse data: discuss with your stakeholders (including grantees) on what is expected from them and help them feed in good quality data.
- Consider how data will be analysed, reported, and further disseminated before you start data collection (e.g., obtain consent of people pictured in photos/videos).
- Build a user-friendly data management system that enables automatic data collection, analysis, and synthesis. Set up an online interface to review data by indicator and project partner.
- Make sure the system is grounded on the Project Logical Framework and captures how data feeds into each indicator.
- Capture both indicators and data for learning purposes.
- Use a shared repository for storing all partners' information and materials.
- Ask partners to collect information while they 'are at it', not at the end of the reporting period.
- Collect only the minimum information required.
- Encourage all partners to verify data and triangulate them if possible.

	✪ As lead partner, check the quality and consistency of collected data (between countries and rounds of data collection) in a timely way and provide guidance to all partners as necessary. ✪ Encourage as much as possible sub-grantees to also feed into the same system and report their achievements. ✪ Consider: How will data be backed up? How long will they be stored for? Who would ensure data quality control? How will you ensure privacy in line with GDPR? ✪ Consider risks of data loss or breach and introduce adequate mitigation measures.

A common issue related to indicators is double-counting. For example, when calculating the number of people involved, one cannot simply add numbers of people who attended different project events. For tips on how to address this please see Annex A.2.

5.4 Data analysis and reporting

All monitoring data are analysed and synthesised by project partners.

To analyse quantitative data, DEAR projects usually compare planned target versus actual numbers, percentages or ratios, trends over time, or variance among project locations or project partners. They can be visualised in tables or graphs. Qualitative data is usually categorised and synthesised manually or with the use of software. They can be also analysed through scoring. See Annex B.13 for tips for relevant software.

Projects include all result indicators in the EC narrative reports (see PRAG version that applies to your project) and upload them online (the platform will be provided by the DEAR Programme) to allow data consolidation on rolling basis at the Programme level.

Chapter 6

Evaluation

6.1 Definition, purpose, and types of evaluations

DEFINITION

Evaluation is a rigorous assessment of either ongoing or completed activities, strategies, or projects to determine the extent to which certain criteria have been met[11].

It may also identify unexpected results. Evaluation uses monitoring data; therefore, timely availability of data is key. It is more rigorous in its procedures, design and methodology than monitoring, and generally involves more extensive analysis.[12] It differs from audit, which verifies adherence to a set of predefined processes (usually expenditures).

External or mixed (internal and external) DEAR project evaluations are mandatory. Their main purposes are[13]:

- Support *informed decisions* about project changes, future projects, budget allocations or policy changes. They revolve around what has (or has not) worked in achieving results, the reasons, and in what context, etc.
- Support *learning* of key stakeholders by questioning lessons learned and how to apply this knowledge to other contexts, etc.
- *Account* to stakeholders by questioning if projects have done the right things, whether they have done what they promised, and how they are contributing to wider policies etc.

[11] Better Regulation Guidelines on Evaluation - Toolbox 43: What Is an Evaluation and When Is It Required? (adjusted)
[12] Handbook on Planning Monitoring and Evaluating for Development Result (undp.org)
[13] Handbook on Planning Monitoring and Evaluating for Development Result (undp.org)

Example: *A DEAR project evaluation revealed that efforts of some partners in social media did not have much success. Consequently, partners adjusted their activities, put less effort into social media, and focused on direct interaction with decision makers to achieve changes.*

Similar to monitoring, evaluation can be conducted at different levels including activities, project pillars, countries or at overall project level. The specific arrangements between the project team and the evaluators may differ. Please see paragraph 4.3 and Annex B.8 for details.

Evaluation users are set specifically by each evaluation. Primary users of project evaluations include (at minimum) the implementers and the EC. Other users include the project stakeholders, the DEAR Support Team, other DEAR implementers, DEAR platforms and networks, researchers and academia, decision makers and others. Evaluation outputs are designed to their needs, so it is worth listing them specifically.

When to conduct the DEAR project evaluation?

While activity evaluations may be ongoing, overall project evaluations tend to be midterm (formative, i.e., to make project improvements) and final (summative, i.e., to make decisions about next steps). Nevertheless, some DEAR projects apply ongoing evaluation e.g., critical friends, the Most Significant Changes. Some DEAR projects also apply a form of ex ante evaluation during the planning stage. They may focus on evidence synthesis, needs assessment, projection of impacts, assessment of different strategies to maximise impact, evaluability, or other aspects of evaluation. Ex post evaluations, which usually focus on impacts and lessons learnt after the project end, are uncommon among DEAR projects.

READ MORE ON **EVALUATION**

- Methodological bases and approach by DG DEVCO, see beside others the complementarity and differences between evaluation, monitoring and audit here
- Evaluation and monitoring: differences, focuses, methodologies, main instruments, a video by the EC External Evaluation Services. See also other evaluation videos
- D. Fetterman: Empowerment evaluation: a stakeholder involvement approach (2019) in Health Promotion Journal of Australia Volume 30, Issue 2 p. 137-142
- The EC, the DG Comm (2017): TOOLKIT for the evaluation of the communication activities and related resources

6.2 Evaluation phases and outputs

As mentioned in paragraph 4.3, it is recommended to set up the MEAL team and to select any external evaluator(s) during the inception stage. If this happens at an early stage, the project plan and logical framework can be reviewed together, MEAL systems can be set-up, and baseline data can be collected in a coherent way.

In any case, the DEAR project evaluations usually follow the steps below:

EVALUATION PHASES

Preparatory

Inception

Field Phase

Synthesis

Communication

1. Preparatory
   a. Decisions on the evaluation purpose, scope, management of the evaluation.
   b. The evaluation ToR development by the project team.
   c. Systematising key MEAL documents and links to learning and accountability (including appropriate timing).
   d. Tender for the selection of the evaluator(s) or evaluation team and contracting.
2. Inception
   a. Kick-off meeting between evaluators and the project team.
   b. Initial interviews of selected actors, review of key documents by evaluators.
   c. Development of evaluation methodology.
   d. Drafting inception report.
   e. Translating surveys and other key documents, piloting.
   f. Finalising inception report.
3. Field phase
   a. Data collection as per proposed methodology, adjusted as necessary.
   b. Data analysis, verifying hypothesis, collecting missing evidence.
4. Synthesis
   a. Drafting the evaluation report, consultations with the project team and key stakeholders.
   b. Finalising the evaluation report.
5. Communication
   a. Dissemination of the evaluation outputs to key stakeholders.

Evaluation outputs usually include a **Terms of Reference** (ToR), which is the starting point for project and evaluation teams. Then: **inception report**(s), where the evaluation team details evaluation methodology after initial research, and **evaluation report**(s), with key findings, conclusions, and recommendations. Guiding templates are in Annex B.9, B.10, and B11 respectively. The project team (and in some cases key stakeholders) discuss draft versions. Final versions are submitted to project partners and the EC. For other evaluation outputs, see dissemination in Chapter 7 on Communication.

TIPS FOR **PLANNING AN EVALUATION**

- Start planning for the evaluation during the project design and include stakeholders in this process.
- Select any external evaluators, critical friends or MEAL teams early after signing the project contract with the EC to enable early feedback on the project set-up.
- Ask evaluators to prepare an inception report (see above).
- Evaluate project activities on an ongoing basis and the whole project at agreed times – at least at midterm and at the end. Note that midterm or final evaluations usually take 4 to 8 months. The preparatory phase may take several months especially if the implementer is a local authority.
- While planning the final evaluation, consider stakeholders and staff available time, and the availability of data. If possible, submit final evaluation reports after verifying the final values of indicators to have a clearer picture of the project effectiveness, prospects of impacts, and prospects of sustainability.
- Consider fundraising in time for ex post evaluation to assess impacts and sustainability at least 1 to 2 years after the project ends.

Before you start the evaluation, check if you are ready for it.

DEF

DEFINITION

EVALUABILITY is the extent to which an activity or project can be evaluated in a reliable and credible fashion. It explores feasibility, scope, approach, and value for money of an evaluation.[14]

CHECKLIST FOR EVALUABILITY[15]

- Are we clear about why we are doing the evaluation? What is its purpose?
- Do we have an (updated) logical framework?
- Do we have sufficient data available, e.g., baseline and/or monitoring data?
- Do we have accessible reliable information sources?
- Do we have sufficient funds to answer the required evaluation questions or to implement the proposed evaluation methodology? Will the

[14] https://ieg.worldbankgroup.org/blog/evaluability
[15] Road to Results , Making Evaluations Matter: The Practical Guide for Evaluators by Cecile Kusters et al. (adjusted)

evaluation be cost-effective, i.e., will it bring reasonable benefits vs. costs?

- Is it likely that it will be used to improve actions in future? Can stakeholders influence the evaluation decisions? Will they accept and use the findings? Is there a strong leadership to put the recommendations in practice?
- Are there any major factors hindering the evaluation? Are staff members or other stakeholders overloaded due to other priorities? Do they fear evaluation or have conflicting interests? How can this be addressed?

6.3 Scope, criteria, and questions

DEAR project teams, with (if possible) key project stakeholders, set expectations and priorities for each evaluation (the evaluation scope) to maximise the utilisation of resources. Together with the evaluation criteria and questions, the scope sets the basis for the evaluation methodology.

DEFINITION

THE EVALUATION SCOPE sets out what will (and will not) be covered by the evaluation to meet its purpose (e.g., location, time period, project components, stakeholders, see Annex B.9).

EVALUATION CRITERIA are standards or values that are used to assess a project.

EVALUATION QUESTIONS further specify them. They help focus data collection, analysis, and synthesis. Evaluators respond to evaluation questions in evaluation findings and conclusions. Evaluation questions are not directly asked to stakeholders in an interview or survey; they need to be operationalised.

Example: *A DEAR project designed a climate change guide for teachers and trained multipliers to roll it out. During the midterm evaluation, the project team decided to review how the guide was utilised by a) multipliers and by b) other teachers reached by multipliers. They also wanted to know how it affected the students. The purpose was to get recommendations for changes in the guide, the multiplier training, and the dissemination process. The evaluation scope has not included advocacy to the Ministry of Education, as this was primarily planned for the last year of the project.*

While reviewing the criteria of effectiveness of a multiplier training, an evaluation question may be: 'To what extent has the project contributed to behavioural changes among multipliers?'. Survey questions for multipliers could take the form of: '1. Have you introduced any changes in your teaching practice following the multiplier training? Yes/No 2. If yes, what were the max. 3 main changes?'.

The DEAR Programme MEAL recommends **common DEAR evaluation criteria and questions** (see Table below), so that key findings, conclusions, and recommendations could be consolidated at the

Programme level and shared with other DEAR implementers and stakeholders. These are in line with OECD/DAC (2021) and the EC[16] evaluation criteria and questions.

Nevertheless, the criteria and questions can be adjusted to better fit the projects' and stakeholders´ needs (e.g., based on its theory of change or intervention logic, issues identified during monitoring or evaluations, and on the priorities and values of stakeholders). For example, you may want to consider gender or human rights-based approach as criteria. Previous evaluations or research may also give you some inspiration.

Different types of questions and sub-questions determine different types of evaluation designs (see table below and paragraph 6.4).

Table: **Types of evaluation questions and related evaluation designs**[17]

Type of question	What it does	Example of an evaluation questions or sub question	Most frequent DEAR evaluation design
Descriptive	Describes what is	*What concerns have teachers had while introducing GCE?*	• Non-experimental designs: One-shot, case studies, before-after (pre-post test), interrupted time series
Normative	Compares what is with what should be	*To what extent has the project addressed the concerns of the teachers?* *Have at least 70% of teachers implemented GCE in their classes?*	• *Same as above*
Causal	Looks into what changes the project brought about	*Has the project contributed to more integration of GCE in target schools?*	• Non-experimental designs: one-shot, cross-sectional, causal tracing, case studies • Quasi-experimental designs with a non-random comparison group, or before-after designs without comparison groups, longitudinal or panel designs, correlation or propensity score matching • Experimental design with a randomly assigned control group may also be considered, but is rare in DEAR

TIPS FOR **DEVELOPING YOUR EVALUATION QUESTIONS**

- Are we Think of evaluation questions together with your stakeholders.
- Avoid questions on multiple issues (e.g., *has the methodology been developed and disseminated to min. 5.000 teachers?*) – separate them. You may develop sub-questions and clarify the data collection for each of them specifically.

[16] The Better Regulation Guidelines of the EC, 2017, recommend the following criteria (focus areas) to the EC staff: current situation, effectiveness, efficiency, relevance, coherence and the EU added value.

[17] Some examples of questions (e.g., normative) may fit better to monitoring and evaluation.

- Minimise the number of causal questions as they require a rigorous evaluation design.
- Keep evaluation questions open-ended, i.e., they cannot be answered 'yes' or 'no'.
- To **prioritise evaluation questions**, you may ask yourself[18]:
  - Is the proposed evaluation question in line with the evaluation purpose?
  - Is it of (continuing) interest to stakeholders?
  - Does it reduce present uncertainty and yield important information?
  - Is it critical to the evaluation´s scope and comprehensiveness?
  - Does the answer(s) have an impact on the course of events?
  - Is it answerable, given the financial and human resources, time, methods, and technology available?
  - Is it reasonable to ask given the project cycle? (e.g., impacts may need time)

READ MORE ON **EVALUATION QUESTIONS**

- Preparing an evaluation question on Capacity4Dev highlights many other tips.
- Focus the evaluation on key questions on Capacity4Dev helps you choose the right evaluation questions.
- Better regulation toolbox of the EC, Tool no. 47: Evaluation criteria and questions.
- BetterEvaluation.org on key evaluation questions with further tips and resources.
- Road to Results for types of evaluation questions and related evaluation designs.
- Globales Lernen: Evaluierung und Wirkungsbeobachtung (Evaluation and Impact Monitoring) website by the German DEAR platform VENRO, available in German

Table: **Common DEAR evaluation criteria and potential evaluation questions for project evaluations**

Criteria	Adjusted DAC definition	WHAT: recommended evaluation question	WHY: Potential follow-up for projects/the EC
RELEVANCE	The extent to which the project objectives and design respond to	1. To what extent do the project objectives and design reflect current needs and priorities of the EC, 'target	To adjust the current (and future) projects and Programme.

[18] Road to Results, Kusters et al.: Making evaluations Matter

	target groups, beneficiaries, global, country, and partner/institution needs in relation to DEAR, to their policies, and priorities, and continue to do so if circumstances change.	groups' and 'beneficiaries'? 2. How relevant are selected stakeholders involved in the project activities to the project objective/s and sustainability (e.g., methodology or policy development and implementation, including policy makers as well as people outside of Europe)?	To further explore emerging trends. To make programmatic decisions (e.g., about sustainability plans and exit strategy, about priorities for a next call for proposals).
COHERENCE	The compatibility of the project with other interventions in a country, sector, or institution.	3. To what extent does the project add value to other interventions (DEAR projects as well as other initiatives, including policies of key actors) while avoiding duplication? 4. To what extent do other internal and external interventions (particularly policies), support or undermine the project and vice versa?	To adjust the current (and future) projects, utilise synergies and avoid duplications. To make programmatic decisions (e.g., better linking to other programmes).
EFFECTIVENESS	The extent to which the project achieved, or is expected to achieve, its objectives, and its results, including any differential results across groups.	5. To what extent do the outputs contribute to outcomes and the outcomes contribute to the project's overall objectives? (i.e., what activities/outputs contribute most to specific outcomes and impacts, how and why)	To adjust the current projects (incl. dissemination, scale-ups, etc.). To design future projects or establish new partnerships. To make programmatic decisions (e.g., allow logical framework changes to increase effectiveness).
EFFICIENCY	The extent to which the project delivers, or is likely to deliver, results in an economic and timely way.	6. To what extent are project outputs and outcomes delivered in an economic and timely way, considering alternative uses of inputs (funds, expertise, resources, time) in the given context? 7. How efficiently has the project been managed?	To adjust the project and its budget (incl. synergies with other projects / activities).
IMPACT	The extent to which the intervention has generated or is expected to generate significant positive or negative, intended or unintended, higher-level (wider societal, environmental, economic) effects.	8. What are the most significant positive or negative, intended or unintended, higher-level changes to which the project contributed?	To further support positive changes and mitigate negative changes.
SUSTAINABILITY	The extent to which the net benefits of the intervention continue or are likely to continue.	9. What is the likelihood that the (expected) net project benefits (for target groups and beneficiaries) will sustain considering financial, economic, social, environmental, and institutional capacities that are expected to be in	To implement measures that increase the likelihood of sustainability.

		place after the project ends?	
EU ADDED VALUE	The value resulting from EU interventions (projects) that is additional to the value that would have resulted from interventions initiated at regional or national levels by both public authorities and the private sector.	10. What is the additional value resulting from the project, compared to what could reasonably have been expected from Member States acting at national and/or regional levels? - partially covered under 2.	To highlight the EU added value to stakeholders.

6.4 Evaluation design

DEFINITION

An **EVALUATION DESIGN** identifies the nature and sequence of tasks, data collection methods, and the range of analytical methods to be used to deliver the evaluation. **Good design starts by agreeing on the evaluation purpose and scope**[19].

The evaluation design is usually developed into an **evaluation (design) matrix** that helps in planning data collection, analysis, and synthesis for each evaluation question (see table below). It is drafted by evaluators during the inception stage.

Types of evaluation questions and related evaluation designs are mentioned above (table in paragraph 6.3). One-shot or before-after (pre-post) designs have been applied most commonly in DEAR so far.

Table: **Evaluation matrix – example**

Evaluation question or sub-question	Answer / indicator	Availability of baseline	Design	Sources of verification	Data collection methods (incl. sampling)	Data analysis	Reporting
E.g., What are the most significant (...) changes to which the project has contributed?	*Changes categorised by theme, stakeholder and significance (as per the [Most Significant Change](#)*	*No*	*One-shot*	*All key stakeholders* *Annual narrative report*	*Survey among teachers (random sample of 500 teachers)* *Focus groups* *Key informant interviews* *(purposefully sampled*	*Text analysis, selection of the Most Significant Change in a panel made of school representatives*	*Selected most significant change, categories of changes and selection criteria reported to all stakeholders, plus*

[19] EUROPEAN COMMISSION. *Better Regulation Guidelines on Evaluation: Toolbox 46: Designing the Evaluation* [online]. 2017

	panel)				*informants for both methods)*		*submitted to the EC*

6.5 Evaluation approaches and data collection methods

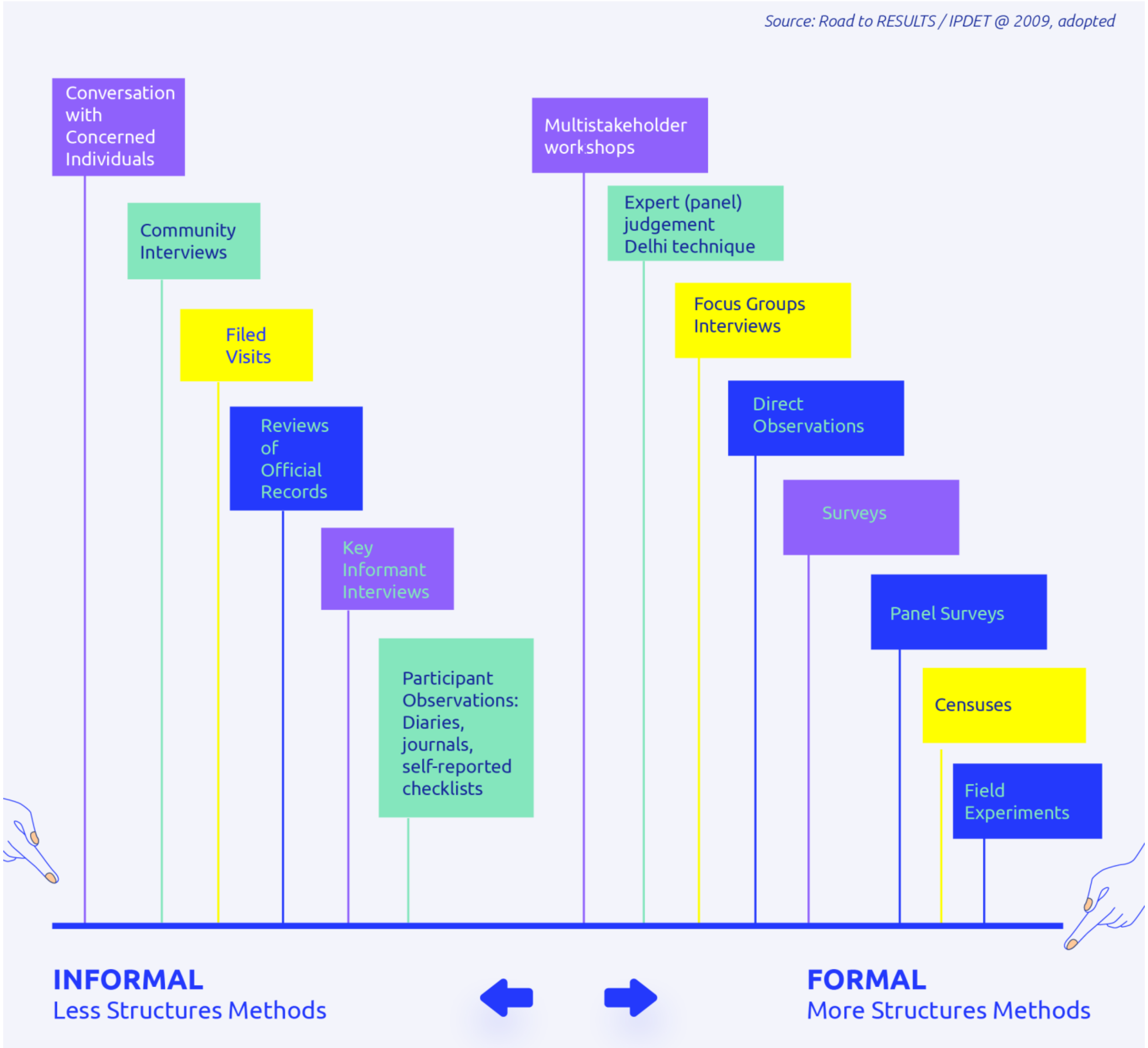
Evaluation approaches applied to DEAR projects include Appreciative Inquiry, Case Study, Contribution Analysis, Most Significant Change, Outcome Mapping, Outcome Harvesting, Process Tracing, Rapid Outcome Assessment and others. They usually include several **data collection methods.**

The data collection methods may be **qualitative** (e.g. interviews, focus group discussions, observations), used to understand concepts or experiences, **quantitative** (e.g., surveys, field experiments), used to test or confirm theories and assumptions[20], or **mixed.** Mixed-method evaluation systematically integrates different kinds of data, usually drawn from different designs and methods[21]. To be able to select the appropriate approaches and tools, consult the resources below. Most frequent tools or methods are pictured below.

Image: **Data collection methods**

[20] Note that while qualitative methods usually generate words, i.e., qualitative data, but may generate numbers as well (e.g., satisfaction with the project services from 1 to 10). At the same time, quantitative methods usually generate numbers or data convertible to numbers (quantitative data) but may also generate qualitative data such as opinions or recommendations.

[21] https://www.betterevaluation.org/sites/default/files/Mixed%20Methods%20in%20Impact%20Evaluation%20%28English%29.pdf
https://www.usaid.gov/sites/default/files/documents/1870/Mixed_Methods_Evaluations_Technical_Note.pdf


Source: Road to RESULTS / IPDET @ 2009, adopted
Conversation with Concerned Individuals
Community Interviews
Filed Visits
Reviews of Official Records
Key Informant Interviews
Participant Observations: Diaries, journals, self-reported checklists
Multistakeholder workshops
Expert (panel) judgement Delhi technique
Focus Groups Interviews
Direct Observations
Surveys
Panel Surveys
Censuses
Field Experiments
INFORMAL
Less Structures Methods
FORMAL
More Structures Methods

Annex B.13 contains tips for online technologies useful to conduct interviews, groups discussions, surveys, to collect stories or to analyse and visualise data.

To ensure the accuracy of findings, informants or respondents are sampled and the sampling method is justified. The **sampling** can be random (all have the same chance to be selected) or non-random (evaluators may apply a quota for each group of stakeholders, use snow-ball techniques to find respondents, select typical cases etc.). If you wish to ensure a representative sample (e.g., to generalise the findings to all teachers), consider the minimum sample size. Note that in qualitative evaluations, 'representative samples' or generalisation are widely disputed because of the very nature of the qualitative approach.

TIPS ON **DATA COLLECTION FOR EVALUATION**

- Develop a strong MEAL team (see chapter 4.3 above).
- Consider MEAL training opportunities (at an established university, your national evaluation society, the European Evaluation Society, the IPDET - International Program for Development Evaluation Training or EvalPartners, etc.).
- See Annex B.9 for an evaluation Terms of Reference template.
- To estimate the sample size, consult your colleagues – statisticians or evaluators. Eventually, you may use a sample size calculator (such as by IndiKit).
- Ask evaluators to test questionnaires, interview guides, observation checklists or other tools with colleagues or selected stakeholders and adjust them to improve the clarity of the words you use and to make sure you get the answers that you need.
- Make sure all evaluators/interviewers/data collectors are trained and understand the key concepts as well as local context and language.
- The last two points above are key especially when multilingual tools are being used. You may use reverse translations of developed tools to double-check that nothing has been misunderstood.
- 'Harvest' experiences and lessons learnt after all major activities and periodically for the whole project i.e., by using surveys (e.g., pre and post-training), steering group de/briefing, stakeholder meetings or reports, focus groups or informal meetings.
- Creating a 'learning journal' or 'diary' can help in collating perspectives and experiences from across all of the stakeholders in your project.[22]
- Introduce standard internal evaluation tools to be applied on an ongoing basis, such as steering group reviews, surveys, event debriefing, etc.
- If there is no baseline data, try to reconstruct the baseline by using secondary data (e.g., administrative data from the current or previous projects or from existing surveys) or by asking key informants in interviews or surveys to recall the data. Consider biases related to the methods you use.

[22] Global development campaigning and education in Europe: Ideas and suggestions from EU supported DEAR Project (2021)

Triangulation of sources, methods, and (also) evaluators help to not only validate findings, but to map out or explain the richness and complexity of human behaviour.[23] It is therefore an important aspect of quality.

Example of triangulation*: If a municipality representative claims that only fair-trade products are now available at all meetings, you may want to check municipality procurement practices, observe selected meetings, ask those municipality representatives who had not been involved in your project etc.*

Further professional standards are mentioned in the UNEG Ethical Guidelines for Evaluation. Beside others, **anonymity**, **confidentiality,** and **data protection** (GDPR) measures need to be set. Methodology including all these aspects, methodological limitations. and potential biases need to be included in the evaluation report.

Be aware that different **biases** affect quality and reliability of the evaluation:

- confirmation bias e.g., looking for evidence confirming intervention logic, hypotheses;
- self-censorship e.g., informants do not freely answer since feedback is not anonymous, and/or interviewer is someone they know);
- informants´ strategy e.g., sharing only those aspects that are in line with informant´s opinion;
- question-induced answers, empathy bias i.e., informants answer positively and highlight the project benefits rather than pitfalls of external factors;
- Unrepresentative samples or sample selection bias e.g., those who agree to be interviewed may not be typical representatives of the entire group.

TIPS TO **MINIMISE BIAS**

- Mix positive and negative questions to reduce empathy and question-induced bias.
- Strictly observe **anonymity** (evaluators do not know the identity of informants) or **confidentiality** (evaluators know the identity of the informant but protect it from others). Ask evaluators to get consent from informants to add their names in an annex to the evaluation report. A list of consulted persons is a good practice, but some informants may be anonymised.
- Use **triangulation** of methods, evaluators, and sources (types of stakeholders).

[23] L. Cohen et al (2007): Research Methods in Education, 6th edition, ISBN 0-203-02905-4, page 141

READ MORE ON **THIS TOPIC**

- Measuring Global Citizenship Education: A collection of Practices and Tools (2017)
- How Do We Know It's Working - a printed toolkit and an online database of activities to measure attitudinal change in pupils (before-and-after): downloadable instructions, images, recording templates and case studies, tailored to DEAR.
- The Council of Europe Reference Framework of Competences for Democratic Culture
- C. Bergmüller et al (2021): Quality and Impact in Global Education - see interdependencies of impact and lessons learnt from researchers. The link offers free download of the source.
- A. Scheunpflug (2020): Evidence and Efficacy: A Compulsion for Global Learning?, Chapter 4 in the Bloomsbury Handbook on Global Education and Learning.

6.6 Analysing contribution to changes

DEFINITION

DATA ANALYSIS is the process through which data is usually cleaned, processed, categorised per evaluation question (or by other categories), further explored, explained, and confirmed by using triangulation.

A specific challenge is **data analysis of causal questions**, linked especially to effectiveness, impact and sustainability. DEAR projects usually do not apply experimental or quasi-experimental evaluation designs to show what would have happened without the project ('counterfactual') due to unavailability of comparison groups above all. Therefore, they cannot prove attribution, i.e., that the changes happened because of the project. Instead, most evaluations verify if the DEAR project contributed to the reported changes by following the steps below.

Steps to understand causes and project contribution:

1. Check if the **actual activities, outputs, outcomes, and impacts work along the intervention logic or theory of change** i.e., if activities led to expected outputs etc. Check plausible explanations.
   - Most frequent methods applied by DEAR projects include Contribution Analysis, Process Tracing, Comparative Case Studies, Qualitative Comparative Analysis, Collaborative Outcomes Reporting, Rapid Outcome Assessment, checking timing of outcomes and impacts etc.
2. If possible, compare the results to an estimate what would have happened without the project ('counterfactual')

- If experimental and quasi experimental designs cannot be applied, ask different informants to predict what would have happened without the project.

3. Explore alternative explanations for changes, including other DEAR projects, national interventions, implementation of different policies and other external influencing factors e.g., a new school curriculum required global issues to be mainstreamed in education, so teachers used it as an opportunity to implement what they have learned in a training implemented by the project.

    - Most frequent methods include Key Informant Interviews (asking informants about alternative explanations), General Elimination Methodology (find alternative explanations and then systematically investigate if they can be ruled out) or Process Tracing (looking for plausible alternative explanations at each stage of the theory of change), Rapid Outcome Assessment (alternative explanations are discussed by a panel of experts) or searching for disconfirming evidence / follow-up on exceptions.

TIPS: **QUESTIONS TO ANALYSE PROJECT CONTRIBUTION**

- What difference has the project made?
- How much, for whom, in what situations, and in what ways?
- Why is it significant?
- How exactly has the project contributed?
- What are alternative explanations for the change(s)?
- If the project really made the difference (in a certain context), what is the evidence? What sources can confirm this?

READ MORE ON **THIS TOPIC**

- BetterEvaluation.org – Methods and Processes: Understand Causes of outcomes and impacts
- Indikit – resources on data analysis
- WISE - Web Interface for Statistics Education tutorials
- Road to results, pages 373 – 411 explains steps for quantitative and qualitative data analysis.
- Introduction and Methodology by DG INTPA

Chapter 7

Communication and follow-up[24]

Communication with key stakeholders is an essential part of the project team's work during all stages of the project, as it directly links to accountability as well as learning.

Tips below refer to dissemination of evaluation findings, conclusions, and recommendations to various audiences. They are based on the EU Open Science policy, which requires FAIR (Findable, Accessible, Interoperable and Re-usable) and open data sharing to enable learning and innovation.

TIPS FOR **MEAL DATA DISSEMINATION**[25]

- Mix At the inception stage, **decide on the purpose of dissemination** of MEAL outputs, e.g., on getting feedback to preliminary findings, conclusions, and recommendations, or to account to people involved in the project, or to support key stakeholders to act upon evaluation recommendations, or to support new policy development, etc.
- **Ensure high quality of the MEAL process and outputs** (check Annex A.2).
- **Tailor the communication tools/products, channels and activities** to the purpose and the stakeholders.
- Have **communication responses** ready in case if MEAL outputs are challenged.
- If certain data are not disseminated to stakeholders, then consider if they need to be collected at all.

[24] For all communication material and content, please follow the DG INTPA Communication Guidelines

[25] Engaging Your Audience (2020), Creative Communications for Evaluation Dissemination, Evaluation Support Service of the DG DEVCO 04, Brussels, accessed on 15 July 2021 at https://europa.eu/capacity4dev/evaluation_guidelines/documents/interactive-pdf-report-evaluation-dissemination-study and

Guidelines For Dissemination And Feedback Of Evaluations (2004), accessed on 15 July 2021 at https://europa.eu/capacity4dev/evaluation_guidelines/documents/guidelines-dissemination-and-feedback-evaluations-0

The following tools provide useful resources and ideas for internal as well as external communication of MEAL findings, conclusions, and recommendations:

Table: **External and internal communication products of MEAL**

Product	Use	'How to' Guide	Example
(Evaluation) reports with an executive summary	To report to Project staff, EC and publish online	See Annex B.11 for template and Annex B.12 for quality assessment grid	Frame, Voice, Report! Evaluation report on their homepage
Infographics	To use in all relevant communication products (possibly as stand-alone on online communication channels): users can be followers of projects, INTPA and other relevant social media and websites, EC (to highlight impact to decision-makers and other stakeholders), media who follow project topics and/or developments (to facilitate their reporting), Capacity4Dev readers; DEAR Support Team and newsletter (community update) readers, etc.	How to Guide: Evaluation Infographics	EU DEAR Programme results (see interactive version here) UNESCO Global Education Monitoring Report Education and the Global Goals
Videos	To place on all relevant online channels. Users can be project participants, followers of projects, INTPA and other relevant social media and websites, possibly media who follow project topics and/or developments (to inspire their reporting), DEAR Support Team and newsletter (community update) readers, etc.	How-to-guide: video	1planet4all (select your language in subtitles) Intercambioso.be Des Alpes au Sahel klimaatling.be Riforest.nl Osotuafoundation.nl globelink.be
Podcasts	To place on all relevant online channels. Users can be DEAR practitioners and researchers, project participants, project website users, possibly media who follow project topics and/or developments (to inspire their reporting), DEAR Support Team and newsletter (community update) readers, etc.	How-to-guide evaluation podcasts	Case study on Global Education at the Stanford Social Review Innovation
Blogs and articles	To place on all relevant online channels. DEAR practitioners and researchers, DEAR Capacity4Dev readers, project participants, project website users, possibly media who follow project topics and/or developments (to inspire their reporting), etc.	How-to-guide evaluation blogs	Online tutoring programme to address Covid-19-induced educational inequalities on the Poverty Action Lab Blog PEER country profiles on climate change education at the World Education Blog

Briefs	To raise key issues and recommendations to decision-makers, leadership of the project partners, DEAR practitioners and researchers, DEAR Capacity4Dev readers, etc.	How-to-guide evaluation briefs	How to engage citizens with the SDGs for DEAR implementers by FrameVoiceReport.org

Possible **channels for external communication** and dissemination include e-mail (targeted or as parts of organisational, DEAR platforms or other newsletters), websites (organisational, project websites, DEAR Programme website, national DEAR-related websites, etc.), social media, conferences (focusing on DEAR, on causes addressed by the project such as on climate change, or on evaluations such as the European Evaluation Society conference etc.) or multi-stakeholder workshops.

Internal communication channels may include e-mail, boards, intranet, management meetings, strategy workshops, etc.

DG INTPA plans to **publish evaluation reports** with annexes and selected consolidated monitoring documents and reports on the official DEAR Programme website to communicate the programme contributions and lessons learnt, support the use of developed outputs and capitalisation. Project partners are encouraged to share their monitoring outputs, including narrative reports and consolidated indicators, through their communication channels.

READ MORE ON **COMMUNICATING AND DISSEMINATING RESULTS**

- Glen O´Neil (2017): A Guide: Integrating Communication in Evaluation gives specific tips for communication before, during, and after evaluation.
- For Disseminating Evaluations, see good practices which include a report on practices from 12 international donors and 5 how-to guides on the production of videos, factsheets, podcasts, etc. at Capacity4Dev.
- See more examples of evaluation dissemination outputs in the evaluation database of The Entertainment-Education Network, which convenes the communication and media development, social and behaviour change communities. For example, see the Life of Lulu for a short article on the project evaluation and an 11-page evaluation brief.
- Engaging Your Audience (2020), Creative Communications for Evaluation Dissemination, Evaluation Support Service of the DG DEVCO 04, Brussels.
- Guidelines For Dissemination and Feedback of Evaluations (2004).
- The 'Report and Use' section of BetterEvaluation.
- Disseminating Evaluations – tips by the European Support Service at Capacity4dev.

Finally, project partners are encouraged to regularly consider evaluation recommendations in decision-making. Furthermore and whenever possible, consider longer term **capitalisation** of experiences across projects. It is also worth '**evaluating the evaluation'** (meta-evaluation) and drawing conclusions for future evaluation processes.

Annex A – Essential Reading

A.1 DEAR Engagement Pyramid

The Engagement Pyramid pictured below is a tool that helps monitor the number of people engaged by DEAR projects, as well as the intensity of their engagement. It maps 6 possible levels of engagement, from level 0 'consumer' to level 6 'innovator'.

Image: **Engagement Pyramid**

Sources (merged and adjusted): DEAR Support team, DEAR Projects: Achievement & Impact 2018 Report (pp 60-61) and EC-funded project 'Frame, Voice, Report!'.

Indirect (level 0)

- **Level 0: Consumer** –– contact with the action is by chance, through coming across it e.g., via media articles, street events, promotional materials, or an advert.
    - Examples of monitoring: press review, estimate (or photo) of participants to an event in which a project activity is implemented.

Informed (level 1 – 2)

- **Level 1: spectator/aware** – is aware of the action and the issue with which it is concerned. Engagement is erratic, e.g., through occasional (or possibly single) visit to a project website, blog, or Facebook page, or through access to a report, a lesson, or session in school.
    - Examples of monitoring: visits to the project website, social media data (clicks, showings, etc.), download of documents related to the project.
- **Level 2: follower/interested** – is interested in the action/the issue and keeps updated without further commitment. Contact is through direct communication e.g., email subscription, Twitter, or Facebook. However, beyond possibly attending a free public (or other) event this may not lead to further follow up.
    - Examples of monitoring: estimate of people attending an event (e.g., street action), reactions on social media, repeated visitors to the website, registration sheets of conferences.

Engaged (level 3 – 6)

- **Level 3: Supporter** – agrees with and expresses support for the action. Agrees to carry out a simple action e.g., signs a petition, endorses and forwards an electronic message, joins in a free entrance event, takes part in a discussion meeting of the project, attends a one-off session, changes purchasing behaviour in some areas, etc.
    - Examples of monitoring: social media reactions (sharing, comments), registration sheet of workshops, trainings, signatures for a petition, request to analyse the project for a thesis or research.
- **Level 4: Activist** – is committed to the action. Participates in a series of events and contributes, attends a public hearing, tries out ideas or resources from the project, makes a public statement of personal support (e.g., writes a letter), changes purchasing behaviour relating to a wide range of items.
    - Examples of monitoring/evaluation: volunteer database, interviews, focus groups, most significant change.
- **Level 5: Multiplier** – is committed to the action and promotes it to others. Systematically promotes the project issues e.g., promotes involvement in the project's issues and ideas to friends and acquaintances, to people in the local community or in the workplace. Takes part in a study tour and disseminates the experience.
    - Examples of monitoring/evaluation: interviews, focus groups, most significant change, outcome harvesting.
- **Level 6: Innovator** – is committed to the action/the issues and develops and implements (new) ideas for its promotion. Works with and targets others to develop and implement new ideas for actions e.g., introduces whole-school approaches, initiates creative activities/media events, initiates lobby meetings with decision-makers, develops new policy formulations, etc.

- Examples of monitoring/evaluation: list of events/initiatives autonomously organised by beneficiary(ies), interviews, focus groups, most significant change, outcome harvesting.

A.2 Step-by-Step Guide to Core DEAR indicators

All DEAR project implementers are requested to collect data on Core DEAR Indicators to make decisions on the project level and to show project contributions to the overall DEAR Programme. Consolidated results from all DEAR projects are expected to form a basis for further questions and learning.

As opposed to project-specific indicators (set by projects individually), Core DEAR Indicators are set at Programme level and evidence has to be collected by implementers.

Detailed definitions and methodological notes, how to collect, analyse and report the data can be found below. Implementers may contact the DEAR Support Team with questions related to the Core DEAR Indicators and data collection.

Overview of content on this step-by-step guide:

Qualitative indicators (OO1, SO1-2-3): significant changes

Specific Objective level (SO2): No. and % of people in Europe, including youth, actively engaged in sustainable development on local and/or global level

Intermediary Outcome-level (IOC1): No. and % of multipliers newly or increasingly engaging with others in GCE and/or sustainable development

Intermediary Outcome-level (IOC2): Number of organisations with improved policies and/or practices supportive of GCE / sustainable development

Output-level (OP1): People involved in initiatives launched under the Programme

Output-level (OP2): Number of schools, nonformal education facilities and Programmes involved in initiatives launched under the Programme

Output-level (OP3): No. of grassroots CSOs benefiting from EU support

A.2.1 Qualitative indicators (OO1, SO1–2–3): significant changes

Rationale:

Behavioural, social, policy or even systemic changes are complex, with a number of influencing factors beyond the DEAR Programme. They cannot be easily reduced to a set of easily quantifiable statistics[26]. Moreover, DEAR can have a number of unintended impacts. Therefore, **a mixed approach** is proposed to monitor progress of the DEAR Programme and to evaluate its outcomes and impact. Harvesting qualitative changes on the level of outcomes and impacts form the basis of this approach.

OVERALL OBJECTIVE

The overall objective of the DEAR Programme is a more inclusive society with a developed sense of co-responsibility for local and global sustainable development and global challenges (such as climate change and inequalities).

On the impact level, projects are expected to collect stories demonstrating **'Extent to which the Programme (indirectly) contributed to significant lasting systemic, policy, social or environmental changes in the area of sustainable development'.**

- **'Lasting'** changes go beyond the intervention e.g., changes in behaviours of teachers visible even one year after they have been trained in Global Citizenship Education, such as using GCE materials, creating learner-centred environment, etc. Social changes may include changes in inclusiveness and sense of co-responsibility in communities, etc.
- **'Significant'** change is any change that citizens (including multipliers) and organisations (national institutions, local authorities, corporations, civil society organisations, educational institutions, etc.) who were directly involved in the DEAR Programme perceived as 'significant'.
- The **'extent'** to which the Programme contributed, is to be assessed by the key stakeholders in line with selected evaluation methodology.
- Changes that the Programme/project **'indirectly'** contributed to are derived from outcomes i.e., the degree of achievement of Specific Objectives.

Example 1*: Based on the published supplier lists of EU-based companies XYZ (see outcome story example above), activists were able to monitor working conditions of people in 3 factories in China. Improvements proposed by activists (pay rise, protective equipment, air conditioning) to the factories via EU-based companies XYZ have been accepted and implemented by year X. In total, 3000 workers from the 3 concerned factories directly benefited.*

Example 2*: Following the teacher training in GCE and use of materials XY and methodologies YZ (see outcome story example above), class audits undertaken by trained teachers revealed that students have improved their critical thinking, ability to collaborate with others and resolve conflicts. Furthermore, they are able to give examples of global interconnectedness e.g., migration and climate change. They show a more positive attitude to diversity including migrants and refugees. They explain that they have personally*

[26] Understanding the Impact of Global Citizenship Education – Using a Theory of Change Approach, IDEAS Scotland, accessed on 5 August 2021 at https://www.bridge47.org/sites/default/files/2018-12/ideas-impact-report-for-web.pdf

crossed the path of a migrant and directly interacted with migrants, which contributed to their shift. Finally, they enjoy the lessons of the concerned teacher more because they are more interactive.

SPECIFIC DEAR OBJECTIVES / OUTCOMES

Each project should contribute to the following specific DEAR objectives:

- SO1. More people in Europe, including youth, indirectly reached by the DEAR Programme, have a critical understanding of the interdependent world as well as of their own role in it, and who have interest to act for sustainable development;
- SO2. More people in Europe, including youth, are actively engaged in sustainable development on local and global level;
- SO3. Global Citizenship Education is better integrated into formal and nonformal education in European countries.

On the level of specific DEAR objectives/outcomes, projects are expected to collect stories demonstrating **'Extent to which the Programme contributed to significant behavioural or policy changes in the area of sustainable development among people in Europe (including multipliers) and among organisations who were (directly) involved with the Programme.'**

- **'Significant'** change is any change that citizens (including multipliers) and organisations (national institution, local authority, corporation, civil society organisation, educational institution, etc.) who were directly involved in the DEAR Programme saw as 'significant'.

  The significance can then be validated by stakeholders, ideally in a panel and in line with set criteria, see e.g., the Most Significant Change technique, Rapid Outcome Assessment, or through an alternative.

  Note that a significant change on the policy level may also mean that priorities/policies/budgets remain the same and are not disregarded (see example 3 below).
- Similarly, the **'extent'** to which the Programme contributed, is to be assessed by the key stakeholders in line with selected evaluation methodology.
- A **'lasting'** change refers to change that does not happen once, but that endures or is able to endure over a long period of time.
- Direct **'involvement'** in the DEAR Programme (and the projects) means any involvement from following the project/core ideas on social media, receiving a newsletter, or attending an event, to directly supporting the project/core ideas, preparing own events, engaging others, innovating the projects, etc. (levels 2+ of the Engagement Pyramid).

Example 1*: Companies X and Y who were requested by activists to publish their supplier lists have published them on their websites and/or their annual reports in the last 2 years.*

Example 2*: One year after teachers have been trained in Global Citizenship Education, they continue using selected GCE materials, approaches, and methodologies, such as xy to assess changes in competencies and attitudes of students, etc.*

Example 3*: Over the last years, local authorities in country X have been pressured to abandon any financial support for international cooperation. Thanks to local groups, activated by project Y, most local authorities have been able to maintain their support.*

Disaggregation (it is expected that projects can be searched in an online database by the following criteria): Country (all European countries and 'cannot be determined' option), year of implementation, type of DEAR action, topics covered (multiple choice from a list), level of change (impact, outcome, intermediary outcome), link to SDGs.

Data source: Implementers with the help of evaluators, based on the information from their target groups and key stakeholders knowledgeable about the DEAR project.

Frequency of data collection: Project end (or earlier if applicable), along with narrative reports. Implementers would be encouraged to submit their stories of change as they appear, around 1-3 are expected to be reported in later years of the project implementation.

Data collection methods

For evaluation questions, designs and methods, see Chapter 6. A before and after evaluation design (baseline study and end evaluation focusing on the same indicators) is recommended to assess changes. Baseline studies may assess knowledge, competencies, attitudes and behaviours of multipliers, teachers, or students for instance.

Most frequent evaluation approaches applied by the DEAR projects include:

- Theory-based approaches (Contribution Analysis, Process Tracing, etc.)
- Outcome Mapping
- Outcome Harvesting (see progress markers that could help you measure the progress in behavioural changes)
- Most Significant Change
- Rubrics
- Rapid Outcome Assessment
- Case Studies
- Others as found relevant by the implementers and evaluators.

Data collection methods may include: a desk review e.g., of media monitoring and/or partner reports, key informant interviews, focus groups, evaluation workshops, surveys or others as per evaluation methodology and design. If possible, findings should be verified from different sources and through using different methods.

If many people are addressed, randomly selected people may be involved in the evaluation e.g., a survey, asking about knowledge, attitudes, behaviours. See sampling in paragraph 6.5.

Additional considerations and limitations:[27]

Plan in advance the collection of changes e.g., if you provide sub-granting to a project, you may need to go back to them 6-12 months after the project or activity ends to collect the evidence of changes.

You should feel free to report one specific change or several interrelated changes in one story.

[27] Based on the guidelines published at www.BetterEvaluation.org

When describing changes, be as specific as possible e.g., What was the difference? For whom? In what situations? In what ways has your project made the difference? Why is it significant? Describe in detail how exactly your project has contributed to the change(s).

Refer also to paragraphs 6.5 on data collection and 6.6 on data analysis, including data analysis of causal questions, steps to understand causes and project contribution.

Reporting

Implementers are requested to select one or more significant changes every year (if any) and report them online following the structure below. A user-friendly platform to input stories of change will be set up by the DEAR Programme. They will also refer to the reported changes in their evaluation reports, annual narrative reports or elsewhere. In selected cases intended for wider dissemination, they will also be encouraged to make a video report, where the changes are explained by key stakeholder/s. Usually, an impact story would derive from an outcome story, therefore kindly mention any link to previously reported stories of changes when reporting new change(s).

Template for harvesting Changes – Outcomes and Impacts (to be filled in online – platform work in progress)

- project
- country (ies) in Europe where the change took place
- year when the change took place
- contact person
- contact email
- agreement that the contact person and email can appear on the DEAR Programme, Capacity4Dev and/or INTPA websites
- topic (migration, climate change, etc.)
- type of DEAR activity/ies (formal/nonformal education, awareness raising, advocacy)
- relevant objective(s) of the DEAR Programme (SO1, SO2, SO3, OO1)
- level of change (Impact – systemic including education, policy, social, environmental, Outcome – behaviour of target group/s, relations among target group/s, policy/practices of involved institutions, other)
- extent of contribution (major with none/some external factors, moderate with several important external factors, minor with decisive external factors)
- description of change (max 200 words) – what the change was, to whom and how it happened, including the motives and roles of different stakeholders and changes among them, with quantitative data (including baseline) if available
- how the project contributed to this change (refer to specific activities, max 150 words)
- why is the change important, given the context (max. 50)
- relevant SDGs (check all that apply: drop-down list, + other)
- lessons Learnt
- sources of evidence (sources of verification including links to approved policies, evaluations, etc.)
- attachments (photos, video, others)
- any other related change(s) reported so far.

Example:

Title of the change	***Small organisation in Country A reinvigorates the public debate on human trafficking and contributes to new legislation***	
Project	*Name of the project*	*Contact person: XY*
Implementer(s):	*XXX (sub-granting scheme)* *Z.org (campaign implementer)*	*Contact email: XY@Z.org*
Country(ies)	*Xx EU Member State, Nigeria (see below)*	*Period/date when the change was observed: 2018 – 2019*
Agreement that the contact person and email can appear on the DEAR Programme, Capacity4Dev and/or INTPA websites: *YES*		
Topics	*Migration, gender*	
Level of change	*Impact – Policy*	
Extent of contribution	*Major contribution confirmed by stakeholders, together with other external factors*	
Description of change (what was the change and how it happened) Max. 200 words	*The campaign xy contributed to several policy changes. First, human trafficking is now explicitly mentioned in the new Government´s Declaration; then a new government´s Anti-Trafficking coordinator has been appointed and action team set up; and finally new legislation is being prepared to reflect the situation of children of victims of human trafficking and their legal status.*	
How the project contributed Max. 150 words	*The campaign, run by Z.org, showcased a story about a former victim of trafficking from Nigeria and highlighted specifically women trafficking, its root causes and structural global factors that produce it.* *The XXX sub-granting scheme of the DEAR project funded a trip to Nigeria to provide volunteer activists with hands-on experience and to collect materials for campaigning. It then funded several volunteer-led events, seminars and film screenings that raised awareness on the issue. The campaign also involved students of social work. According to a project board member of Z.org, XXX also gave Z.org the credibility and reliability to establish cooperation with journalists and reach a wide audience. Campaign materials with journalist articles and trainings served as input for a meeting with the main national anti-trafficking network with presence of key ministries and government agencies. Journalists shared the story in the media, thus reaching around 40% of the country's population.*	
Why is the change important (given the context)? Max. 50 words	*For the first time in Country A, the specific issue of women and children, who are victims of human trafficking to the EU, was highlighted in mainstream media, among the wider public as well as policy makers.* *The policy changes have raised public awareness and could have positive impact in the future, especially on migrants coming to Country A.*	
Link to SDGs	*SDGs: 1, 4, 5, 8, 10*	
Lessons Learnt	*It is important to create an alliance of stakeholders to achieve policy changes.* *Survivor-led movement/testimonies are a powerful way to engage people.* *Engaging volunteers in planning and executing the campaign helps to 'make' them change agents.* *Enough resources need to be set aside for coordination and supervision of volunteers.*	
Evidence (sources of verification)	*Link to the evaluation report, which combined desk study and key informant interviews - see case study XZXZXZ (Country A) on pages 48 – 53 of the final project evaluation report.* *Links to Government´s Declaration, the Anti-Trafficking coordinator, and the draft legislation project website with a video from the campaign* *Campaign website or hashtag*	
Attachments	*Photos, video report explaining the change by a key stakeholder*	
Title of any other	*None*	

related change(s) reported so far	

Proposed data analysis on the DEAR Programme level: verification of evidence and adjusting for communication purpose by the DEAR Support Team, in cooperation with implementers and INTPA.

Proposed data synthesis and communication on the DEAR Programme level:

The DEAR Support Team and the EC will use the cases to demonstrate the added value of DEAR as well as the complexity of changes. They will be communicated to key DEAR stakeholders. The format is yet to be decided.

READ MORE ON **THIS TOPIC**

- Global Citizenship Education - how to measure and improve the impact, which includes guidance for implementing Outcome Mapping, Outcome Harvesting, and the Most Significant Change.
- Better Evaluation or INTRAC for specific evaluation approaches and methods.

A.2.2 Intermediary Outcome-level (IOC1): No. and % of multipliers newly or increasingly engaging with others in GCE and/or sustainable development

Rationale:

Multipliers are considered as key vehicles towards influencing people in Europe. The number of multipliers will be communicated to key DEAR stakeholders to understand the size of the Programme. Implementers and their partners will likely be interested in the % of multipliers with changed behaviours compared to the total number of those involved e.g., trained multipliers to assess effectiveness of different activities and to adjust e.g., change multiplier workshops, toolkits or other strategies).

INTERMEDIARY OUTCOME 1

The DEAR Intermediary Outcome 1 specifically states that ‘Multipliers are engaged in activities that support GCE and/or critical understanding of sustainable development among people and institutions and empower them to act’.

The indicator is defined as ***SO1.2. No. of multipliers, involved in DEAR projects newly or increasingly engaged with others in GCE and/or sustainable development.***

- A **multiplier** is defined in level 5 of the DEAR Engagement Pyramid as a person that is committed to the DEAR project and promotes it to others (see Annex xx for details). S/he systematically promotes the issues raised by the project in their own social or work environment.

- **Educators**, as specific multipliers, include project issues, approaches, and methodologies in their own educational activities, in line with the GCE.
- **Innovators**, in line with the level 6 of the Engagement Pyramid (see annex xx), are also understood as multiples. They:
    - develop and implement (new) ideas for the promotion of causes/ideas,
    - work with and engage others to develop and implement new ideas for actions e.g., introduce whole-school approaches, initiate creative activities or media events, initiate advocacy actions with decision makers, develop new policy formulations, etc.
- **Project staff** members (including paid staff members of partners and sub-grantees) are excluded from the calculation, while unpaid 'project volunteers' are considered multipliers.
- A **'newly engaged' multiplier** has not been acting as described above before they joined the project.
- An **'increasingly engaged' multiplier** has already been engaged in promoting (some of) the issues raised by the project. With project contribution, they now:
    - widen the causes/ideas they promote and/or
    - spread a more nuanced message based on a deeper understanding of the cause(s) and/or
    - widen the group of people they promote the cause to or otherwise changes their engagement e.g., by taking other actions or promoting the cause by other means or more frequently.

***Example of a multiplier**: a Scouts leader, following a workshop on climate change organised by a DEAR project, discussed climate adaptation measures with her group that could reduce the incidence of droughts and fires in their community. Together with the municipality, they implement climate adaptation activities in the community for the first time.*

Disaggregation:

- per type of multiplier: pre-service teacher, in-service teacher, other educator, media worker (journalist, blogger, etc.), youth leader, other activist (except youth leader), decision maker, other - note that each multiplier is to be calculated just once so the project managers decide if a certain multiplier is primarily a media worker or educator or a youth leader
- country
- project
- sex / gender (male, female, other, not possible to determine)
- age: >35; < or = 35; not possible to determine

Data source, Frequency of data collection: implementers with evaluators, project start if applicable, annually

Data collection methods

Project partners set up a system of data collection that tries to avoid double-counting whenever possible. In cases where future multipliers are being trained (or otherwise involved) by the project for the first time, a baseline study is recommended to collect their subjective view on their engagement before they join e.g., in a registration form for their training, asking for self-assessment, and to compare it 6-12 months after their training (pre-post evaluation design). If multipliers cannot be identified beforehand e.g., as they develop naturally from among reached people, then data will only be collected ex post – annually (post design).

Recommended data collection methods include:

1. surveys among trained multipliers or a follow-up focus group with them;
2. surveys among partner organisations (schools, businesses, etc.) or an interview / focus group if planned anyway to identify multipliers among their staff, volunteers, pupils, etc.
3. desk review of evidence such as event/workshop promotion materials by multipliers or observation, if available;
4. others if suitable.

Additional considerations and limitations:

Note that the indicator measures neither the quality of the actions and messages that the multipliers spread, nor such actions or messages which contribute to the changes.

Ask multipliers annually, which 1 – 3 project changes are most significant and thus should be reported under the qualitative indicator *SO1* – ***Significant behavioural or policy changes among people in Europe (including multipliers) and among institutions who were directly involved in the DEAR Programme***.

Reporting

Lead organisations will be requested to verify the data and annually fill in a form. Only new multipliers are reported every year to avoid double-counting. A one person-multiplier can only be counted under one multiplier type e.g., either a youth leader or (other) activist.

Template for data collection of indicators:

Example:

Table for multipliers		
Project	Name of the project	
Country A	Drop down list (Add numbers for each category): pre-service teachers in-service teachers other educator media worker youth leader other activist (non-youth leader) decision-maker other (specify)	For each category: Male no. Female no. Other no.
		>35 years no. < or = 35 no. not possible to determine no.
Country B	….	

Proposed data analysis, synthesis on the DEAR Programme level:

The data will be verified (check if they are plausible) and consolidated by the DEAR Support Team in the DEAR Output-Outcome-Impact Monitoring Table (by type of multiplier on the EU level). Separately, country reports or reports with a specific multiplier type(s) may be issued.

A.2.3 Intermediary Outcome-level (IOC2): Number of organisations with improved policies and/or practices supportive of GCE / sustainable development

Rationale:

Next to individual multipliers, organisations of different types are considered key to influence people across Europe. Just as multipliers, the number of organisations will be communicated to key DEAR stakeholders to understand the size of the Programme, while implementers and their partners will likely be interested in the % institutions that changed policies, practices or relations compared to the total number of organisations they reached.

Definition:

INTERMEDIARY OUTCOME 2

The DEAR Intermediary Outcome 2 specifically states that 'Organisations (national institutions, Las, businesses, CSOs, educational institutions, etc.) improved policies and practices supportive of GCE and sustainable development'.

The indicator is defined as ***SO1.2. No. of organisations, involved in projects or direct grants, which improved policies or practices supportive of GCE and/or sustainable development.***

- **Organisation** is an organised group of people with a particular purpose. They include national institutions, local authorities, businesses, civil society organisations, educational institutions, etc. Project partners as well as sub-grantees are included in this calculation.
- '**Involved** in projects or direct grants' means that the organisation is a direct participant, i.e., grantee, sub-grantee or 'target group' of a concerned project or grant.
- **'Improved policies'** are laws, strategies, action plans, regulations, procedures, budgets (or any other formalised practices that expect compliance in the organisation) that have been changed with project or direct grant contribution to better reflect GCE and/or sustainable development.
- **'Improved practices'** are ways in which things are ordinarily done within an organisation, which have been changed with project or direct grant contribution to better reflect GCE and/or sustainable development. Practices often result from organisational culture and habits that have accumulated over time. They may or may not conform with the organisation's policies.

Example of an improved policy: *Following the project advocacy, the government declaration now includes a specific commitment to GCE implementation. The indicator is 1 (one organisation, namely the government in Country X).*

Example of an improved practice*: Fair trade products are available at all public events of the LA XY. It is a case of events organised not only by the staff involved in the DEAR project, but also by others. The indicator is 1 (one organisation, namely the LA XY).*

Disaggregation:

- per type of organisation: national institution, a local authority, media outlet, company (excluding media outlets), civil society organisation (excluding media outlets), formal education institution, nonformal education facility, other
- country
- project

Data source, frequency of data collection: implementers with evaluators, project start if applicable, annually

Data collection methods

Project partners set up a system of data collection that avoids double counting, ideally a list of all involved organisations if possible. A baseline study is recommended to collect the perception of contact persons within the target organisations about their policies and practices in relation to the project topic/s. Alternatively, a desk review of the policies and procedures may be conducted to identify strong and weak points.

In the midterm evaluation and at the end of the project, changes in policies and practices will be gathered via the following data collection methods:

5. surveys among contact persons (and other staff, if relevant and possible);
6. interviews and/or focus group among staff;
7. surveys among partner organisations (schools, businesses, etc.) or an interview / focus group if planned anyway to identify multipliers among their staff, volunteers, pupils, etc.
8. desk review of evidence, e.g., policy proposals and final policies, etc.
9. observation and others if suitable.

Additional considerations and limitations:

Note that the indicator does not measure the quality of the actions and messages that the organisations spread and their impacts.

Consider which changes among organisations are most significant and thus should be reported under the qualitative indicator – ***Significant behavioural or policy changes among people in Europe (including multipliers) and among organisations who were directly involved in the DEAR Programme***.

Reporting

Lead organisations will be required to verify the data and annually fill in the following form. As the monitoring of changes in policies and/or practices is expected only midterm and during final evaluation, it is expected that 0 will be reported in the remaining years of implementation. Only new organisations with improved policies and/or practices are reported in subsequent year(s) to avoid double-counting. One organisation can be counted only under one organisational type e.g., either as a media outlet or a CSO, as decided by the implementers.

Template for data collection of indicators:

Project x	National institution	LA	Media outlet	Corporation (no media) outlets)	CSO (no media outlets or schools)	Formal education institution	Other
Country A	*no.*	*no.*	*no.*	*no.*	*no.*	*no.*	*no.*

…	…	…		…	…	…	

Proposed data analysis, synthesis on the DEAR Programme level:

The data will be verified and consolidated by the DEAR Support Team in the DEAR Output-Outcome-Impact Monitoring Table (by type of multiplier on the EU level). Country reports or reports with a specific organisation type(s) may separately be issued.

A.2.4 Output-level (OP1): People involved in initiatives launched under the Programme

Rationale:

The number of people involved in initiatives launched within each DEAR project (output level) can help with picturing the overall size of the Programme.

OUTPUT 1

With respect to the output 1 "**People involved in initiatives launched under the Programme"**, the indicator is defined as ***OP1. No. of people in Europe involved in initiatives launched under the programme.***

People who have been **'involved'** in the Programme include:

- **followers** (level 2 of the DEAR Engagement Pyramid) who are people interested in the issues and who agreed to be kept up to date. Contact is via direct communication with the project or one of its multipliers e.g., email subscriptions, Twitter, or Facebook followers. Such people may have attended a public event e.g., an exhibition, theatre performance, public discussion, briefing, lobbying event, organised by the project or direct grant;
- **supporters** (level 3) who agree with and express support for (parts of) the project/action and agree to carry out a simple action after contact from the project e.g., sign a petition, endorse and forward an electronic message or link about the project, join an event that has an entrance fee, change purchasing behaviour relating to one or a similar range of items, voluntarily participate to a session organised at school etc.
- **activists** (level 4) who participate in a series of workshops, attend a public hearing, make public statements etc.
- **multipliers** (level 5) and **innovators** (level 6 - see definitions above).

See the DEAR Engagement Pyramid in Annex A.1 for more details.

The indicator does not include:

- people who are aware of the concerned project or direct grant and the promoted issue/s (level 1), but their involvement is erratic through occasional visits to the project website, blog or

Facebook page, a street event, a compulsory session at school (without any further action of pupils) or who access an online report.

Disaggregation:

- age (below and including 35, above 35, not possible to determine);
- type of involvement (attending an online or in-person training or workshop, attending other online or in person offline events, interaction on an online social network or platform such as Facebook or Instagram, other types of involvement);
- country (including the 'not possible to determine' option);
- project.

Data source, frequency of data collection: implementers with evaluators, annually

Data collection methods

Project partners set up a system of data collection that tries to avoid double-counting if possible. They track the data below:

- no. of online or in person training, workshop, or course attendees e.g., as per attendance sheets – each person counted once, even when the attend multiple sessions;
- no. of online or in person event attendees including street actions, parliamentary hearings e.g., estimation based on photos of venues with participants;
- no. of people interacting on online social media who engage by clicking on the posts, commenting, sharing (as per social media statistics);
- no. of people involved elsehow e.g., newsletter readers as per newsletter software statistics.

If the project does not have specific profiles/pages/groups on the social media, then engagement with

Specific project-related posts are considered.

If the nature of the event does not allow for calculating people of different ages and gender, use the category 'not possible to determine'.

How to tackle double counting?

Below are 2 options for calculation. Implementers are encouraged to use option 1 but may use option 2 if the first option is too burdensome and does not contribute to project decision making:

1) Calculate a range of minimum and maximum people involved, given the process below.

- Minimum: when the same people may be involved/reached by different channels e.g., on FB, Twitter, etc., to avoid counting them multiple times only include the highest number of likes/shares/comments from the overlapping channels e.g., if you have 2000 subscribers of newsletters, 800 Facebook fans and 1000 Twitter followers, the total number of interested people is assumed as 2000.
    - Similarly, in case of public events organised in the same location, if it cannot be proven that different people have attended different events e.g., via attendance sheets, only participants of the event with the highest participation are included in the calculation of the minimum related to a specific location e.g., if we had 3 events in Prague reaching to 100, 150 and 70 people, the total number of participants is assumed to be 150.
- Maximum: a simple sum of participants and subscribers as in alternative 2.

2) Participants of each project event, people involved in any online platform etc., are simply summed up. This will very likely result in double-counting. Kindly mention this limitation whenever you report the numbers.

Suggested data collection methods:

10. desk review of attendance sheets, photos of the audience, and of other evidence;
11. observation by project staff or partner organisations;
12. others if suitable.

Example of a data collection template – People involved in the Project:

People involved		
Project	*Name of the project*	
Country A	Drop down list (Add numbers for each category): Newsletter subscribers Twitter followers Facebook fans Instagram (or other SM) Online event/webinar/meeting Street action Workshop Conference Other type of event (Specify)	*For each category:* *Male no.* *Female no.* *Other no.* *For each category:* *>35 years no.* *< or = 35 no.* *Not possible to determine no.*
Country B	….	

Table above replaces table below

Project x *Country Y*	*Newsletter subscribers**	*Twitter followers*	*Facebook fans*	*Street action*	*Min.*	*Max.*
No. People < or = 35 y.o.	*1000*	*20*	*45*	*0*	*1000*	*1065*
No. People > 35 y.o.	*200*	*130*	*45*	*0*	*200*	*375*
No. People age cannot be determined	*800*	*350*	*210*	*500*	*800*	*1860*
Male	*500*	*80*	*40*	*0*	*500*	*620*
Female	*700*	*70*	*50*	*0*	*700*	*820*
Gender cannot be determined	*800*	*350*	*210*	*500*	*800*	*1860*
TOTAL	*2000*	*500*	*300*	*500*	*2000*	*2800*

** age and gender can be estimated in surveys (response rate: 60% of all 2,000 Newsletter subscribers, 30% of all 500 Twitter followers, 30% of all 300 Facebook followers)*

<u>Additional considerations and limitations:</u>

While the indicator does give an idea of the outreach, it does not measure the quality of the actions and awareness of the people involved. Key questions remain such as: Who do we reach? What difference do we make? Who is left out? How can we reach them? etc.

Reporting

Lead organisations will be requested to verify the data and provide the complete project-level data to the EC annually.

Reporting template for indicator (reporting template for option 1 is to be extended to report on min. and max.)

Project x	Interested persons up to 35	Interested persons above 35	Interested persons - others	Attendees of an online or off-line training or workshop	Attendees of another online or off-line event	People who interacted on social media	Other people involved	Male	Female	Other gender (not determined)	TOTAL interested persons
Country A	*no.*	*no.*	*no.*					*no.*	*no.*	*no.*	
...	...	...						...	...	...	

Proposed data analysis, synthesis on the DEAR Programme level:

The data will be verified and consolidated by the DEAR Support Team. Separately, country reports may be issued.

A.2.5 Output-level (OP2): Schools, nonformal education facilities and programmes involved in initiatives launched under the Programme

Rationale:

The number of schools and other education facilities involved in initiatives launched within each DEAR project (output level) can help imagine the overall size of the Programme.

OUTPUT 2

With respect to the output 2 "**Schools, nonformal education facilities and programmes involved in initiatives launched under the Programme"**, the indicator is defined as ***OP2. Number of schools and nonformal education providers in Europe involved in initiatives launched under the Programme.***

- Only schools, nonformal education facilities and programmes in Europe directly involved in a project or direct grant under the Programme are included in the calculation. A formal commitment by the school / facility/ school leader/ several educators should be in place for the school or facility to be counted. One-off training of educators from different schools/facilities is not sufficient to include their school/facility in this indicator.
- **Schools** include preschools, primary and secondary schools as well as tertiary education institutions.
- **Nonformal educational facilities** are any entities providing nonformal education, such as CSOs, education agencies, sports or cultural facilities or other subjects.
- **Programmes** are counted in case that nonformal education or informal learning is supported by an informal entity, not a school or an educational facility.

Disaggregation:

- preschool, primary school, secondary school, university or college except for teacher training institution, teacher training institution, nonformal educational facility
- country
- project.

Data source, frequency of data collection: implementers with evaluators, annually

Data collection methods

Project partners set up a system of data collection that avoids double counting. They track the data below:

- names of schools/facilities, contact persons with emails, official commitment, names, and emails of persons trained (in line with the GDPR).

Note

- The trained or otherwise involved educators are also counted under multipliers in case that they newly or increasingly involve others in GCE and/or sustainable development (see IOC1 above).
- Similarly, the schools/facilities may also be counted under organisations who improved policies and/or practices (see indicator IOC2 above).
- Therefore, it is recommended to not only keep emails of contact persons, but of all involved educators to collect the above data in 6-12 months after they have been involved for the first time.

Following data collection methods:

13. desk review of attendance sheets and of other evidence
14. others if suitable.

Additional considerations and limitations:

Note that the indicator does not measure the quality of the GCE actions undertaken by the schools or other educational providers and awareness of the educators involved. For that purpose, implementers may consider class or school audits, tests, self-assessment questionnaires before and after project involvement, etc.

Reporting

Lead organisations will be requested to verify the data and fill in the following form annually.

Example of a data collection template OP2 –Schools/education facilities involved in the Project:

Education institutions/facilities involved		
Project	*Name of the project*	
Country A	Drop down list (Add numbers for each category): Teacher training institution Schools (without splitting between preschool, primary, middle, and high) College/universities (except teacher training institutions) Nonformal educational facility Other (Specify)	*For each category:* *no.*
Country B	….	

Proposed data analysis, synthesis on the DEAR Programme level:

The data will be verified and consolidated by the DEAR Support Team. Country reports may separately be issued.

A.2.6 Output-level (OP3): No. of grassroots CSOs benefiting from EU support

Methodological notes on this indicator will be added to this Guide once defined by DG INTPA.


THE CLIMATE IS
CHANGING
SO SHOULD WE!
#ACTNOW

Annex B – Other recommended readings

B.1 Glossary of terms

Term	Definition
Accountability	Obligation for an individual or organisation to account for its activities, accept responsibility for them, and to disclose the results in a transparent manner.
Advocacy	Action directed at changing the policies, positions, or programs of any type of institution or individual.
Agenda 2030	Action plan approved in 2015 by all the member states of the United Nations (UN) to help people and the planet. The Agenda 2030 includes 17 Sustainable Development Goals (SDGs) which were adopted as a universal call to action to end poverty, protect the planet, and achieve a sustainable world by 2030 and beyond, with human well-being and a healthy planet at its core.
Audit	Looks at the integrity of processes, procedures, and compliance. 'Performance Audit' is a specific type of audit which assesses the combined use of resources to meet objectives, against the criteria of economy, efficiency, and effectiveness.
Awareness-raising	Process that seeks to inform and sensitise people about a topic or issue with the intention of influencing their attitudes, behaviours, and beliefs towards the achievement of a defined purpose or goal.
Civil Society Organisation (CSO)	Independent actors, organised on a not-for-profit and voluntary basis, and active in different fields, such as poverty reduction, emergency aid, human rights, environment, etc.
Context analysis	Method to analyse the environment in which a project operates.
Core indicator	Compulsory indicator for all DEAR projects as of 2022

Critical understanding	Closely related to critical thinking. Defensible position reached through reflecting upon, analysing, and evaluating different ideas and positions, and is demonstrated through an ability to express informed responses and independent thought.
Cross-cutting issue	Important topics (such as gender) that affect and cut across most or all aspects of sustainable development. They are expected to be mainstreamed across INTPA policies and programmes including DEAR i.e., integrated in planning, implementation, monitoring and evaluation.
Crowdsourcing	The practice of obtaining needed services, ideas, or content by soliciting contributions from a large group of people and especially from the online community.
DEAR Support Team (DST)	A group of consultants contracted by DG INTPA with the purpose to assist the implementation and smooth running of the DEAR Programme. It assists funded CSOs, LAs and other DEAR stakeholders. It facilitates wider exchanges among DEAR stakeholder.
DG INTPA EU Directorate General for International Partnerships	Unit responsible for formulating the EU's international partnership and development policy, with the ultimate goal to reduce poverty, ensure sustainable development, and promote democracy, human rights, and the rule of law across the world.
Direct Grants	Non-competitive allocations of funds decided by the DEAR Programme to support specific actions considered 'flanking' measures.
Engagement Pyramid	Framework for mapping different levels of engagement. The vertical dimension represents the intensity of engagement, with low level, lightweight engagement at the bottom, and high intensity, deep engagement at the top. Its horizontal dimension represents the number of people involved.
Education for Sustainable Development (ESD)	Empowers learners of all ages with the knowledge, skills, values, and attitudes to address the interconnected global challenges we are facing, including climate change, environmental degradation, loss of biodiversity, poverty, and inequality. Education should be transformative and allow to make informed decisions and take individual and collective action to change societies and care for the planet.
Eurobarometer	Polling instrument used by the EU institutions to regularly monitor the state of public opinion in Europe on issues related to the European Union as well as attitudes on subjects of political or social nature.
Evaluation	Systematic collection and analysis of information about programmes and projects, their purpose, delivery, and impact. Evaluations are used to inform decisions about current and future projects and programming.
Formal education	Education that is institutionalised, intentional and planned through public organisations and recognised private bodies. It consists mostly of initial education, vocational education, special needs education and some parts of adult education. Formal education programmes are recognised by the relevant national educational authorities or equivalent.
Global Citizenship Education (GCE)	• Global education is education that opens people's eyes and minds to the realities of the globalised world and awakens them to bring about a world of greater justice, equity, and Human Rights for all. (Council of Europe, The Maastricht Declaration, 2002) • Global education is a pedagogical approach that fosters multiple perspectives and the deconstruction of stereotypes and builds on a learner centred approach to foster critical awareness of global challenges and engagement for sustainable lifestyles. (North-South Centre, Council of Europe) • Global Citizenship Education aims to empower learners of all ages to assume active roles, both locally and globally, in building more peaceful, tolerant, inclusive, and secure societies. It is based on the three domains of learning: cognitive, socio-emotional, and behavioural.

	The key learning outcomes, key learner attributes, topics and learning objectives are based on (these) three domains (…). They are interlinked and integrated into the learning process. (UNESCO) • Global citizens appreciate and understand the interconnectedness of all life on the planet. They act and relate to others with this understanding to make the world a more peaceful, just, safe, and sustainable place (SEA-PLM, 2016: 5) *Note that GENE has started a process towards a new European Declaration on Global Education to 2050. The process will culminate in November 2022.*
Gender-sensitive evaluation	A systematic and objective assessment of the design and planning, the implementation, and results of an ongoing or completed activity, project, programme or policy from a gender perspective.
Indicator	Quantitative or qualitative factor or variable that provides a simple and reliable means to assess achievement, to reflect the changes connected to an intervention, or to help assess the performance of a given initiative.
Informal learning	Refers to a lifelong learning process, whereby each individual acquires attitudes, values, skills, and knowledge from daily experiences.
Intervention Logic	Management tool used to improve the design of interventions. It involves identifying inputs, outputs, outcomes, impact(s) and their causal relationships, indicators, and the assumptions or risks that may influence success and failure. It thus facilitates project planning, monitoring and evaluation.
Implementers	Legal person responsible for the project implementation, usually CSOs, national platforms, universities, start-ups, institutions or other entities if eligible.
Local Authority	A decentralised, subnational institution which has general responsibilities and some autonomy with respect to decision-making at local level, budget, staff, and assets. As the public institutions closest to citizens, local authorities are responsible for executing a mandate in line with their constituencies' needs. They are able to mobilise all local actors involved in development processes, while acting as catalysts for change.
Logical Framework	A matrix which codifies the Intervention Logic. It provides an overview of a project's goal, resources, activities, anticipated results (outputs, outcomes, impacts) and adds measures by which the project's expected results will be monitored. It is used for project planning as well as a basis for monitoring and evaluation. For a specific template, see the latest DEAR Call for Proposal.
Monitoring	A process of regular check by stakeholders on how an intervention is being implemented in order to identify potential problems (or opportunities) and make timely changes. It entails an ongoing, systematic collection, analysis, and use of management information to support effective decision-making.
Multi-stakeholder approach	Individuals and organisations from different realms participating alongside each other to share ideas or develop policy.
Nonformal education	Education that is institutionalised, intentional, and planned by an education provider. The defining characteristic of nonformal education is that it is an alternative and/or a complement to formal education within the process of lifelong learning of individuals. It caters for people of all ages but does not necessarily apply a continuous pathway-structure; it is typically provided in the form of short courses, workshops or seminars. Spelled without a hyphen, like nonviolent or nonverbal, to highlight its uniqueness and specificity – not an absence of formalisation.

Outcome	It refers to short-term (intermediary outcomes) to medium-term effects in the political, social, economic and/or environmental areas targeted by the project. It also includes changes in behaviours or relations of people and institutions resulting from the project outputs. Primary outcomes are set as project specific objectives.
Output	Describes the products, goods and services delivered by the project. They may also include changes resulting from the project that are relevant to achieve outcomes. Their achievement is under project control.
Ownership (by stakeholders)	Stakeholder ownership comprises formal and informal political, economic, and social forces that determine priorities of government, civil society or the private sector. Stakeholder ownership is therefore concerned with the demand-side within a process.
Participatory approach	Involves stakeholders, particularly the participants in a project/programme or those affected by a given action/policy, in specific aspects of the process.
Participatory evaluation	Evaluation method in which representatives of project implementers and stakeholders (including beneficiaries) work together in designing, carrying out and interpreting an evaluation.
Policy Coherence for Sustainable Development (PCSD)	An approach to integrate the dimensions of sustainable development throughout policy development and implementation. It aims at: (i) fostering synergies and maximising benefits across economic, social and environmental policy areas; (ii) balancing domestic policy objectives with internationally recognised sustainable development goals; and (iii) addressing the transboundary and long-term impacts of policies, including those likely to affect developing countries.
Project Cycle Management approach	It represents the whole of management activities and decision-making procedures used during the life cycle of a project.
Results-Oriented Monitoring (ROM)	External monitoring system assisting the EC and reinforcing the practice of result-based management in the EU external action operations, as part of the EC's commitment to aid effectiveness and accountability.
Human Rights-based approaches (HRBA) to sustainable development	Methodology that should guide all interventions under the NDICI – Global Europe. The HRBA identifies states and their institutions as accountable duty-bearers, with the responsibility to respect, protect and fulfil human rights. The HRBA focuses on reinforcing the capacities of all individuals, as rights-holders, to be aware of and empowered to claim and enjoy their human rights.
SDGs	Goals that are part of the 2030 Agenda and were adopted by the United Nations in 2015 as a universal call to action to end poverty, protect the planet, and ensure that by 2030 all people enjoy peace and prosperity.
SDG Voluntary National Reviews (VNRs)	Process conducted by governments with the involvement of other actors (e.g., CSOs, general public), with the aim to facilitate sharing of experiences, including successes, challenges and lessons learned, with a view to accelerating the implementation of the 2030 Agenda.
SDG Voluntary Local Reviews (VLRs)	Process conducted by subnational authorities to complement the information and data on SDG implementation provided by national governments in their Voluntary National Reviews (VNRs).
Self-assessment	Process through which a person/organisation/entity assesses and makes judgements about their own work.

Peer-assessment	An arrangement through which someone (student, teacher, co-worker, institution, etc.) makes an assessment on the work of their peers.
Stakeholder	Any individuals, groups of people, institutions or entities that may have a relationship with the project/programme. They may – directly or indirectly, positively or negatively – affect or be affected by the process and the outcomes of projects/programmes and therefore hold stakes.
Sub-grantees	Beneficiary of an indirect financial contribution (subgrant) through an EU grant beneficiary for an action intended to help achieving the objectives of the project for which the grant was awarded.
Sub-granting scheme	Also known as financial support to third parties, it is an indirect financial contribution organised within a DEAR project to sub-grantees in order to help achieve the objectives of the project. These third parties/sub-grantees are neither co-applicants, nor affiliated entity(ies), nor associates or contractors.
Systemic	Relates to a policy, practice, or set of beliefs that has been established as normative or customary throughout a political, social, or economic system.
Team Europe	EU foreign and domestic policy approach. Team Europe consists of the European Union, the EU Member States, the European Investment Bank (EIB) and the European Bank for Reconstruction and Development (EBRD). The concept of Team Europe is part of the EU's global response to the Covid-19 pandemic with the aim to work better together, in order to further improve the coherence and coordination of efforts, notably at partner country level.
Theory of Change	A comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is focused in particular on mapping out or 'filling in' what has been described as the 'missing middle' between what a programme or project does and how these lead to desired goals. It is used for planning, monitoring, and evaluation.
Transparency	In project management, it is defined as the clearness of the processes and includes creating a system in which all team members or other actors can easily and efficiently access all relevant information about a project.
Triangulation	Process aimed at facilitating data validation through cross verification from more than two sources. It tests the consistency of findings obtained through different instruments and increases the chance to control, or at least assess, some of the threats or multiple causes influencing results.

B.2 Key Stakeholders of the DEAR Programme

Type of key stakeholder	Role in the DEAR Programme
Civil society organisations (CSOs) including youth movements, grassroot or diaspora organisations and their national, European associations and international networks	Implementers of DEAR projects or direct grants as well as of other DEAR initiatives, key stakeholders in DEAR-related processes.

Local authorities (Las) and their national, European associations, and international networks	Implementers of DEAR projects or direct grants as well as implementers of Agenda 2030, key stakeholders in DEAR-related processes.
Preschools, schools, universities, pre and in-service teacher training institutions, nonformal educational facilities, programmes	Partners of or participants in the DEAR projects or direct grants.
Academic and research organisations and networks (EADI, ANGEL), scholars	Partners of or participants in the DEAR projects or direct grants, as well as those conducting research on DEAR-related issues.
EU Member States public administration (MoEdu, MFA and their agencies), international institutions, political parties, including youth branches and their platforms	Indirectly involved or influenced by the DEAR Programme as well as implementers of Agenda 2030, key stakeholders in DEAR-related processes. The Global Education Network Europe and the North South Centre of the Council of Europe implement multi-annual DEAR direct grants.
Media outlets, media workers (incl. bloggers etc.)	Partners or participants of the DEAR projects or direct grants or indirectly influenced by the same, reaching different types of people on DEAR-related issues.
Business/private sector (including social enterprises, social economy entities)	Partners or participants of the DEAR projects or direct grants or indirectly influenced by the same, having strong influence on Agenda 2030 and on adult education.
People in Europe	Participants of the DEAR projects or direct grants or indirectly influenced by the same, assuming different roles (educators, learners, parents, etc.) in DEAR and Agenda 2030.
People and institutions (CSOs, LAs) in the rest of the World	Directly involved or indirectly influenced by the DEAR projects or direct grants, active in DEAR / Agenda 2030.
Networks, platforms, or associations of (multiple) actors above	Partners or participants of the DEAR projects or direct grants or indirectly influenced by the same.
DG INTPA – Unit G3 – Youth, Education and Culture	EC unit responsible for the DEAR Programme management including contracting, monitoring, evaluation, and reporting.

B.3 Key principles of the DEAR MEAL framework

Principle	How the DEAR MEAL framework plans to reflect it
Coherency, holistic, systemic, long-term, participatory approach	Programme and projects follow a predefined Intervention Logic (supplemented by the project logframes), which is updated as necessary. Supports learning among projects (events by the EC with the support of the DEAR Support Team and others) and key stakeholders (via Multi-Stakeholder Group and other opportunities, including those on project level) as well as upward and downward accountability. Consolidates the MEAL data at Programme level (meta-analysis of narrative reports, Core DEAR Indicators, Results Oriented Monitoring, and evaluation reports). ***Long-term aspirations:*** *Automates data collection / analysis / synthesis* *Supports strategic partnerships on the Programme level to support DEAR* *Engages stakeholders in assessing long-term changes beside others via Programme evaluation (e.g., every 6 years) as well as project / grant evaluations.*
Adaptability, focus on qualitative changes	Supports adapting Programme, project, and grant priorities to current and future trends via multi-stakeholder exchange and learning spaces. Supports projects/grants to harvest changes including unintended consequences to develop stories of change and highlight unique contributions.
Flexibility, simplicity, cost-effectiveness, and applicability	Keeps minimum requirements compulsory and allows MEAL to be adjusted as per the project, stakeholders, approaches, methods, or contexts. Allows changes to respond to emerging needs (by adjusting the activities and the Intervention Logic / logframe). Recommends a (non-exhaustive) list of MEAL designs, approaches, and data collection methods. Supports capacity development in MEL. ***Long-term aspiration***: *Engages stakeholders in monitoring country-specific contexts, allows data disaggregation per country to support interpreting results.*
Transparency	Publishes evaluation reports as well as synthesis/meta-analysis of narrative reports, command DEAR indicators and Results Oriented Monitoring on the DEAR website. Encourages implementers to share results, methodologies, lessons learnt, etc., among themselves as well as with other stakeholders.
Promotion of GCE (DEAR) Quality	Supports dialogue on DEAR / GCE definition and quality. Supports self/peer-assessment of DEAR / GCE quality via learning spaces provided by the DEAR Support Team and others.
Support of learning and innovation	Provides multiple spaces for sharing, learning and co-creation of innovative ideas among different DEAR stakeholders, via the DEAR Support Team and others. Systematically develops capacities of implementers in MEAL. Monitors innovation (in narrative reports via dedicated questions or otherwise).
Link to INTPA / EC priorities	Monitors indicators related to selected INTPA / EC priorities on the Programme level (as Overall Objective indicators as well as Output indicators linked to the EU result Framework). Use them potentially as a reference while harvesting changes.

B.4 DEAR context indicators

Focus	Indicators for Overall Objective(s)	Source
Climate change	# % of EU citizens who consider themselves responsible for tackling climate change per country	Eurobarometer on Climate change and Environment (513 – July 2021)
	# % of EU citizens who believe that climate change is a very serious problem at this moment	Same as above
	# % of EU citizens who consider climate change to be the single most serious problem facing the world	Same as above
	# % of EU citizens who have personally taken action to fight climate change over the past six months, or # % of EU citizens who have taken at least one personal action that helps to tackle climate change	Same as above
	# % of EU citizens who believe that, within the EU, national governments are responsible for tackling climate change, ahead of business, industry and the EU.	Same as above
	# % of EU citizens think that their national government is (not) doing enough to tackle climate change.	Same as above
	# % of EU citizens who think that the EU is successful in addressing climate change.	Special Eurobarometer: EU citizens and development cooperation (512 - April 2021)
	# of countries and cities with climate change and/or disaster risk reduction strategies: (a) developed (b) under implementation with EU support	EU Result Framework indicators 2021
	% of EU Member States which report reduced annual average (lifestyle) carbon footprints of the population (total, breakdown can be monitored)	Institute for Global Environmental Strategies Aalto University and D-mat ltd?) or environmental dimension.
Environment	# % of EU citizens think that decisions to protect the environment should be taken jointly within the EU	Special Eurobarometer on attitudes towards environment (501 – March 2020)
	# % (and no.) of EU citizens who say they have taken personal action to tackle environmental issues in the past 6 months	Same as above
Inequalities	# % of EU citizens think that EU development policy should focus on reducing inequalities in developing countries.	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# % of EU citizens are more likely to be positive about globalisation	Same as above

	# % of EU citizens think providing financial assistance for developing countries contributes to a more peaceful and fairer world.	Special Eurobarometer: EU citizens and development cooperation (494 – October 2019)
	# % of EU citizens think providing financial assistance for developing countries is an effective way to reduce inequalities in these countries.	Special Eurobarometer: EU citizens and development cooperation (494 - October 2019)
	# % of EU citizens agree the differences in people's incomes in their country are too great	Special Eurobarometer: Fairness, inequality and intergenerational mobility (471 – April 2018)
	# % (and no.) of EU citizens who say that inequalities between women and men are widespread in their country (or other questions related to gender equality)	Same as above
	# % of EU citizens who considered social equality as the most pressing for the future of developing countries	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# % of EU citizens think providing financial assistance for developing countries is an effective way to reduce inequalities in these countries	Special Eurobarometer: EU citizens and development cooperation (494 - October 2019
	# % of EU citizens agree the differences in people's incomes in their country are too great	Special Eurobarometer: Fairness, inequality and intergenerational mobility (471 – April 2018)
	# % of EU citizens who say they have equal opportunities for getting ahead in life, like everyone else	Same as above
	# % of EU citizens agree that opportunities for getting ahead in life have become more equal in their country compared with 30 years ago	Same as above
	# % of EU citizens think that equal opportunities of people in the EU are the most important elements for the EU's economic and social development	Special Eurobarometer: Social Issues (509 - March 2021)
	# % of EU citizens think that education, training, and lifelong learning (or we can choose equal opportunities or gender equality as well) is the most important issue for the future of Europe	Special Eurobarometer: Social Issues (509 - March 2021)
	# % of EU citizens think discrimination based on e.g., ethnic origin (or another aspect) is widespread in their country	Special Eurobarometer: Discrimination in the EU (493 - October 2019)
	# % of EU citizens think the efforts their country makes in fighting discrimination are effective	Special Eurobarometer: Discrimination in the EU (493 – October 2019)
	# % of EU citizens have taken personal action to tackle discrimination	Special Eurobarometer: Discrimination in the EU (493 – October 2019)

	# % of EU citizens think it is important for the EU to partner with other countries to reduce poverty around the world.	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# % of EU citizens think that EU development policy should focus on reducing inequalities in developing countries.	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# of victims of human rights violations directly benefiting from assistance funded by the EU	EU Result Framework indicators 2021
	# of people directly benefiting from EU supported interventions that aim to reduce social and economic inequality	EU Result Framework indicators 2021
Gender equality	# % of EU citizens who think that promoting gender equality is important to ensure a fair and democratic society.	Special Eurobarometer on Gender Equality (465 – November 2017)
	# % of EU citizens who considered gender equality as the most pressing for the future of developing countries.	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# of people benefitting from EU-funded programmes to counter sexual and gender-based violence	EU Result Framework indicators 2021
Sustainable development / other	Progress reported by cities with Reference Framework for Sustainable Cities	Reference Framework for Sustainable Cities
	# of grassroots civil society organisations benefiting from (or reached by) EU support	EU Result Framework indicators 2021
	# of government policies developed or revised with civil society organisation participation through EU support	EU Result Framework indicators 2021
	Extent to which SDGs are implemented	www.sdg.org, www.sdgindex.org, https://sdgstoday.org/dataset-hub, SDG in the EU, TPI, Voluntary Local Reviews, Voluntary National Reviews
	# % of EU citizens think it is important for the EU to partner with other countries to reduce poverty around the world	Special Eurobarometer: EU citizens and development cooperation (512 - April 2021)
	Increased no. or EU citizens supporting *cooperation* for sustainable development (per country, age, gender, currently not operationalised)	Special Eurobarometer on dev. Cooperation (potential question to be included, inspired by Special Eurobarometer 512 – April 2021
	Increased no. of EU citizens aware of and who understand their role in addressing global challenges such as climate change and inequalities (ideally focus on understanding of own role, disaggregation per country, age, gender, currently not operationalised)	Special Eurobarometer on dev. Cooperation (potential question to be included, inspired by Special Eurobarometer 512 – April 2021
	Increased no. of EU citizens that are actively engaged in addressing global challenges by	Special Eurobarometer on dev. Cooperation (potential question to be included)

	adapting their behaviour, disaggregated by gender and age	
	# % of EU citizens who claim that they understand well what is going on in today's world	Standard Eurobarometer - Winter 2020-2021 (94-April 2021)
	# % of EU citizens think the EU should strengthen its partnerships with African countries to ensure sustainable development on both continents	Special Eurobarometer: EU citizens and development cooperation (512 – April 2021)
	# % EU citizens say they have heard of the Sustainable Development Goals (SDGs), although reported awareness varies widely across Member States	Special Eurobarometer: EU Citizens views on development cooperation and aid (455 – April 2017)
	# % of EU citizens think it is important to fund humanitarian work OR # % of EU citizens are aware that the EU funds humanitarian aid	Special Eurobarometer: EU Humanitarian Aid (511a – March 2021)
	Equal opportunities: # % of EU citizens who think that life is fair and that they have equal opportunities for getting ahead or # % of EU citizens who agree that opportunities for getting ahead in life have become more equal in their country compared to 30 years ago	Special Eurobarometer: Fairness, inequality and intergenerational mobility (471 – April 2018)
	# % of EU citizens who are more likely to be positive about globalisation OR # % of EU citizens who agree that immigration into their country is a good thing	Special Eurobarometer: Fairness, inequality and intergenerational mobility (471 - April 2018)
	# % of EU citizens who propose that EU citizens' voice should be taken more into account for decisions relating to the future of Europe	The Special Eurobarometer 'Future of Europe' (FoE) (500 – March 2021)
GCE	Extent to which (i) GCE and (ii) ESD are mainstreamed in (a) national education policies (b) curricula (c) teacher education, and (d) student assessment (SDG 4.7.1 = access, index with values from 0 to 1, per country)	Self-reported by relevant ministries to UNESCO in consultation with NGOs (partnered with governments, UNESCO, OHCHR)[28] Source of verification by UNESCO: the IEA International Civic and Citizenship Study (ICCS 2016) as a main source, in addition with OECD Teaching and Learning International Survey (TALIS), the IEA Trends in International Mathematics and Science Study (TIMSS) and the OECD Programme for International Student Assessment (PISA) and possibly also GENE, CONCORD Europe, PLATFORMA, Angel and the Council of Europe.

[28]UNESCO plans to publish a report based on a recent global survey of teachers' readiness to integrate ESD and GCED in their teaching. The report is expected to be published around the end of November 2021.Concept note on how to measure SDG indicator 4.7.1. and a report on environmental issues integration in education: SDG indicator 4.7.1: Proposal for a Measurement Strategy (2020), UNESCO. Learn for our planet: A global review of how environmental issues are integrated in education, 2021, UNESCO.

	GCE/ESD themes covered in (a) national education policies (b) curricula (c) teacher education, and (d) student assessment	Consolidated in a UNESCO report on SDG 4.7.1, may be used in dialogue with national authorities about what themes are (not) covered, where and how and what support may the project provide. Possibly also reports of GENE.
	#% of students by age group (or education level) showing adequate understanding of issues relating to global citizenship and sustainability.	Source of verification by UNESCO: the IEA International Civic and Citizenship Study (ICCS 2016) as a main source and the OECD Programme for International Student Assessment (PISA) as a supportive source. ICCS contains information for five out of the six categories considered for this indicator (Interconnectedness and Global Citizenship, Gender Equality, Peace, Human Rights, Sustainable Development). PISA contains information for the remaining category (Health and Well-being). Source: same as above
	# % of 15-year-old students showing proficiency in knowledge of environmental science and geoscience.	Source of verification by UNESCO: the IEA Trends in International Mathematics and Science Study (TIMSS) as a main source and PISA as a supportive source. Source: same as above
	# % of countries that reported they had mainstreamed ESD and ESD themes in their laws and policies	UNESCO: Implementation of standard-setting instruments, Part II: Implementation of the 1974 Recommendation concerning Education for International Understanding, Cooperation and Peace and Education relating to Human Rights and Fundamental Freedoms – Consolidated Report on the Implementation of the Recommendation, March 2021
	# % of countries that reported they adopted whole-school approaches to teaching	Same as above
	# % of countries that reported they had mainstreamed ESD and GCED themes in their curricula	Same as above
	# % of countries that reported that teachers are taught to use cross-curricular and whole school approaches	Same as above
	# % of countries that reported they had mainstreamed ESD and GCED themes in student assessment	Same as above
	# % of countries that reported supporting research and similar activities to improve the implementation of ESD and GCED.	Same as above

Youth	# % of young Europeans who consider it a good idea to promote cooperation across disciplines in European schools and universities and to increase the emphasis on the teaching of creativity and critical thinking	Flash Eurobarometer: The European Education Area (466 – May 2018)
	# % of young Europeans who support the initiatives aimed at building a European Education Area supportive to teaching and learning	Flash Eurobarometer: The European Education Area (466 – May 2018)
	# % of young Europeans agree that it would be useful to give students the chance to work on innovative projects alongside academics, researchers, and companies from different countries. They would also welcome more opportunities to study and work together across disciplines and departments	Flash Eurobarometer: The European Education Area (466 – May 2018)
	# % of young Europeans who consider it important to have an experience abroad	Flash Eurobarometer: The European Education Area (466 – May 2018)

B.5 Examples of DEAR project-specific indicators

Result LEVEL (example)	**WHAT indicators to monitor** (examples)	**WHO will collect data**	**WHEN / how often**	**HOW will data be collected**	**WHY,** i.e., how will the data be consolidated and used
Specific Objectives: e.g., Better integrate GCE in the formal education of target countries.	% of schools involved that refer to GCE in their school curriculum and annual report	Implementer with project evaluators	At the project beginning, midterm and end	Pre/post evaluation design (to identify trend) using desk review	Consolidated into a project database, logical framework, and narrative reports, aggregation by type of school and location. Used by implementers to assess project effectiveness and to adjust project activities. Further used to communicate project/ GCE contribution to decision makers
Specific Objective: e.g. More citizens engaged in SDG actions from local to global levels	No. of citizens engaged in climate change (inequalities, SDG, etc.) actions (detailed list agreed by the project)	As above	At the project 97beginnin g, midterm and at the end	Pre/post evaluation design: baseline and follow-up omnibus surveys in selected target cities of project countries	Consolidated into a project database, logical framework and narrative reports, aggregation by gender, age, location. Used by implementers to assess the support provided by the project and to adjust project activities. Further used to communicate types of SDG actions among new audiences
As above	% of citizens engaged in climate change (inequalities, SDG) actions from the number of citizens trained by the project	As above	As above	As above	As above, used especially to adjust project activities (promotion of trainings, selection of participants, training design, etc.)
As above	No./% of people, involved in the project who changed their consumption patterns	As above	As above	As above	As above, used to adjust project activities and to communicate to citizens about the changes
Intermediary Outcome: e.g., Trained youth engage in a multi-stakeholder dialogue on climate change inequalities, SDG, etc.)	No./% of trained youth engaged in a multi-stakeholder dialogue at local, regional, national, or global level on issues related to climate change inequalities, SDG, etc.)	As above	Annually	Follow-up survey or focus groups. If comparison with their initial engagement is needed, then baseline survey or focus groups.	Consolidated in a project database, logical framework and narrative reports, aggregation by gender, location, type of dialogue. Used by implementers to assess the support provided by the project and to adjust project activities. Further used to communicate on youth engagement with other DEAR actors
Intermediary Outcome e.g., Changed policies and/or	Policies and/or practices of local authorities changed with	As above	At least at midterm and at the end of the	Survey among LAs, interview with selected LA representatives	*Categorised, consolidated as above, potentially developed into a case study (story of change). Used to assess project*

practices of local authorities	project contribution		project	and key stakeholders affected by the policy/practice, desk review, observation.	*effectiveness and make changes as well as to communicate to LAs any changes, inspire them and provide support for further changes.*
Outputs e.g.,, Trained youth ready to engage in actions that address climate change (inequalities etc.)	No./% of youth directly involved in the project who have confirmed specific plans to engage in the project cause (e.g., climate change, inequalities etc.) at local and global level	As above	At the end of project events	Survey	To understand the take-aways from the project activities and the intent of those involved. A follow-up survey may explore what actions have people actually taken and what further support they would need.
As above	Types of actions that directly involved youth plan to engage in	As above	*As above*	*As above*	(categorised per key global challenge / SDGs / otherwise as per project causes)
Output e.g., *Trained youth understand the impact of climate change (inequalities etc.) at local and global levels*	% of trained youth who are able to name at least 3 impacts of climate change (inequalities etc.) at both local and global levels	As above	At the end of trainings	*Survey among trained youth (if the project intends to increase the %, then a baseline needs to be collected before the training or at its beginning)*	Consolidated into a project database, logical framework, and narrative reports. Used by implementers to provide feedback to the trained youth, to assess the training and to adjust as well as in advocacy e.g., to educational institutions (about the lack of understanding of climate change as per the baseline and the need to build climate change into the curriculum).
As above	# No./% of trained youth who are actively engaged in their community (level 4-6 in the Engagement Pyramid)	As above	midterm and at end	*One-shot*	Consolidated into a project database, logical framework, and narrative reports. Used to adjust training and follow-up activities.
Output 3 of the DEAR IL: Reinforced exchange of practices and enhanced coordination and networks amongst key stakeholders	Usefulness of exchanges of practices, coordination and networking as perceived by key stakeholders (e.g., on a 4/5-point Lickert scale)	As above	midterm and at the end	*One-shot*	Consolidated in a project database, logical framework, and narrative reports. Used to adjust the exchanges and to assess effectiveness (contribution to results).
As above	% of stakeholders with increased level of coordination/cooperation/collaboration (scale defined by the stakeholders)	As above	At the project beginning, midterm and at the end	Pre/post evaluation design (to identify trend) using desk review	Consolidated in a project database, logical framework, and narrative reports. Used to adjust project activities to strengthen coordination/cooperation/collaboration and to assess effectiveness (contribution to

					results).
Output 4 of the DEAR IL: Proposed changes in policies and/or practices	No. and types of proposed changes in policies and/or practices (including budgets, action plans, consultation processes etc.)	As above	midterm and at the end	*One-shot*	Consolidated into a project database, logical framework, and narrative reports. Used to adjust project activities and to assess effectiveness (contribution to results).
Output 5 of the DEAR IL: Increased opportunities for people in Europe, including youth, and organisations, including schools, to actively engage in sustainable development at local and global level.	% of people involved in the project who have learnt at least one new opportunity to actively engage in sustainable development at local and global level.	As above	midterm and at the end	*One-shot*	As above.

Tips for additional resources: Fricke H-J et al (2015): Monitoring Education for Global Citizenship: A contribution to debate – *see page 40 to 41 for potential outcome indicators.*

B.6 Stakeholder Analysis Template

Below is an example of a stakeholder analysis based on the Power/Interest/Attitude matrix by Murray-Webster and Simon. The following steps are recommended to complete the analysis:

- list all potential stakeholders and add their type e.g., donor, teacher, media;
- consider what power or influence they have on the core issue and potential project results and objectives e.g., to mainstream migration in school curriculum, how they have demonstrated interest(s) in the project and how they have been affected by the issue(s) so far e.g., teachers may be interested to use develop materials on migration to teach about cross-cutting issue 'active citizenship', as students raise the subject;
- add what attitude they have towards the project i.e., positive (supporters), negative (opponents) or neutral, as well as their capacity and motivation to bring about change(s);
- decide what role the stakeholders should have and what (project) actions they will be involved in. It is usually recommended to focus on stakeholders with high power and interest. In the second step, focus on those with power, who have not demonstrated the interest in the project and/or the cause, and ignite it e.g., by involving them in multistakeholder consultations, presentations of the context from their perspective, etc.

Table: **Stakeholder Analysis (example)**[29]

Stakeholder (or group of similar stakeholders)	Power	Interest	Attitude	Capacity	Possible role in the project
E.g., Ministry of Education, responsible for the GCE curriculum	*High*	*High*	*Neutral*	*Low*	*Involves selected project staff member in the working group on the new GCE curriculum etc.*

[29] Adjusted stakeholder analysis from the EU PCM Guidelines (2004) and the Outcome Mapping.

B.7 Risk assessment template

The risk assessment process is a careful examination of risk factors that can affect the project, all of its components and stakeholders, including the consequences of those risks and mitigation measures. Carrying out initial risk assessments as a part of the planning process will help you identify whether existing resources and facilities are adequate to ensure risk control, or if the project needs to be altered accordingly. It will also help you identify potential costs that need to be considered as a part of the project application.

A simple risk assessment template used in project planning (by Tools4Dev) is given below:

Risk	Probability	Severity	Proposed mitigation measures
Example: mistrust of the marginalised youth and their parents in the CSO implementing the project	Moderate	Major	Cooperation with local informal network of parents and with community leaders, building on their needs and highlighting project benefits

Another format has been designed by the University of Essex. Follow these steps:

1. what the hazard, hazardous events and consequences are. Remember that one hazard may be followed by more than one hazardous event and therefore have consequences;
2. who might be harmed and how – look at your project and identify who might be harmed and how. Think about areas such as social risks, legal risks, economic harm, reputational risk, safeguarding risks, health and safety risks, ecological risks, etc.
3. what you are already doing to control the risks;
4. what further action you need to take to control the risks - estimate and evaluate the risks. Consider the likelihood of the risk occurring (from very unlikely to very likely) and the expected consequence (from insignificant to catastrophic);
5. who needs to carry out the action and by when the action is needed.

Risk assessment

Hazard, hazardous event, consequence(s)	Who might be harmed	Current controls	Current risk	Additional controls needed to reduce risk	Residual risk	Target Date	Date achieved
Example: Following local elections, new councillors may stop supporting the project	*Our organisation,* *Other CSOs,* *Project partners, target groups of the project.*	*Established relations with individual democratic political parties.*	*Medium*	*Invite politicians from all key political parties to stakeholder meetings, hold a meeting with new councillors responsible for education, regularly*	*Low*	*Jun 2023*	*May 2022*

				communicate project results at the Council.			

B.8 External or mixed evaluations – distribution of roles

Table: **Pros and Cons of internal, external, and mixed / hybrid evaluation**

Who conducts evaluation	**Internal staff** (internal evaluation)	**External providers** (external evaluation)	**Mixed teams** (hybrid evaluation)
Advantages	May have a better understanding of the project, context, policies Develop organisational MEAL capacities Usually higher ownership of evaluation findings and recommendations Usually cheaper	May bring a new perspective or special expertise (technical, MEAL) More 'independent' or distant from the implementer – may facilitate better among stakeholders (across hierarchies, in case of mistrust) Usually perceived as more credible Usually accelerates all evaluation phases	Combine advantages of the internal and external staff Useful in context where specific technical or cultural competence is needed e.g., where a community is unlikely to provide good quality data to outsiders, but technical expertise is needed Usually cheaper than external evaluations
Disadvantages	May not be able to see alternative perspectives, solutions (bias) Influenced more by the implementing organisation (want to keep their jobs) May be less credible to stakeholders May be time-consuming	May not be able to comprehend fully the project due to time/other constraints Usually more expensive	Takes time for everyone to get used to their roles, especially if applied for the first time

Below is an example of a division of roles and responsibilities in case of an external evaluation.

Example: The division of roles and responsibilities between the project team and evaluators

Phase / Responsibilities	***Implementers***	***Evaluators***
Evaluation	Continuous evaluation and learning, with involvement of key stakeholders Develops ToR and calls for external evaluators Selects external evaluators and introduce them to key	Propose evaluation approach and methodology Draft and finalize inception reports Perform desk review

	actors as appropriate Provides timely secondary data to the evaluators Regularly provides feedback to evaluators about the process and outputs Shares evaluation outputs among key stakeholders and supports mutual learning Uses evaluation outputs in communication, advocacy, planning	Collect data as agreed, facilitate evaluation meetings Analyse and synthesise collected data Draft and finalise inception reports Provide feedback to the quality of internal MEAL data if needed

B.9 Evaluation Terms of Reference template

Below are tips for the process and key questions on how to develop an evaluation ToR, as per *the EC evaluation ToR template for third parties. The link includes a detailed, indicative guidance to implementing partners commissioning an evaluation. It is not a compulsory template for evaluations commissioned by EC services.* Some more resources are provided at the end of this section.

Firstly, discuss the following with your project team and ideally with key stakeholders (donor, other institutions, community):

Background

Descriptive overview of the intervention that aims at providing tenderers with key relevant information, helping them to contextualise the intervention. Provide tenderers with background of:

- **relevant country, region, and sector** – specify organisational, social, and political context, add reference to the relevant policy documents and lessons learnt during previous and related activities;
- **the intervention to be evaluated** – define title, budget, date, rationale, time span, possible co-financing, links with interventions financed by other donors. Describe Intervention Logic, assumptions and include Logframe or any different diagram;
- **stakeholders** – including its final beneficiaries, partners, and donors, define their role, involvement in the intervention and how this is expected to impact on them;
- **other available information** – such as a SWOT analysis, specific Risk Analysis, Context Analysis, previous monitoring or evaluation reports, contribution to Sustainable Development Goals (SDG).

Description of the Evaluation Assignment

The type of evaluation has a direct impact on the methodological approach and on the issues to be studied. Define following aspects:

- **type of evaluation** – midterm, final or ex post evaluation;
- **objectives of the evaluation** - describe in a few words why this evaluation is needed and who will be the main user of the evaluation;
- **purpose** – specify what you would like to get out of the evaluation, what you would like to learn from it and why you do the evaluation now (for example, you plan a subsequent project on a

bigger scale, or you would like to apply the approach elsewhere, or you would like to find out why your approach did not work in a certain context);

- **evaluation criteria** e.g., standard OECD/DAC or EU evaluation criteria, issues to be addressed e.g., gender, environment, and climate change, etc. and evaluation questions (check the evaluation questions in this Guide and add yours). Try your utmost to limit the issues to be addressed to a maximum of 7. The more questions you add, the less time the evaluators will have to properly address them. There are three main types of evaluation questions: descriptive, normative, and cause-and-effect. Be careful to choose the appropriate evaluation design as per the evaluation question! (check presentation below);
- **evaluation phases** – define key activities and required outputs for each of four phases (inception, field, synthesis, and dissemination). Here you can specify the methodology and tools you want the evaluators to use, with whom and if the meetings will be held, judgement criteria, data sources, etc.);
- **methodology** – define how the evaluation criteria would be answered. In an external evaluation, you may ask an evaluator or an evaluation team to propose this. Nevertheless, it is a good exercise to think of the indicators for each question, sources of information (documents, stakeholders), data collection methods (quantitative like surveys or qualitative like interviews) and data analysis / reporting. It gives you an idea of the evaluation timeline, budget, and other aspects;
- **management and steering of the evaluation** – consider establishing a Reference Group to discuss the validity of findings, conclusions, and recommendations of the evaluation team;
- **human resources** – specification of internal capacities (expertise, money, time), key requirements, team coordinator, contact person, etc.

Expertise Required

Define the expertise (such as sector-specific expertise, team management skills, gender expertise, communication, and language skills, etc.) required within the team, not in terms of profile of the individual evaluators, number of evaluators and of working days per category. Gender balance in the proposed team, at all levels, is highly recommended.

Location and duration

Specify location(s) of assignment, foreseen duration of the assignment in calendar months and starting period and planning.

Reporting

The text of the reports must match quality standards and should contain maps, graphs, and tables. Specify content, timing, and submission for each of four phases of evaluation, possibility to send consolidated comments on the outputs, working language, and formatting of reports and number of report copies.

Content of the offers and other details

The offers to be submitted for the execution of this contract should include the technical offer (proposed methodology, timetable, competencies, etc.), financial offer, deadline for the submission of questions and for the offers, modalities for the submission, assessment and details about invoicing and payments.

Budget of the present evaluation

Specify what the estimated evaluation budget is and to what extent the evaluation is realistic within the budget available.

Based on the above, you would develop an Evaluation Terms of Reference (ToR).

Tips for more resources:

- Guidance for the Terms of Reference for Impact Evaluations by the EC in the Programming Period 2014 - 2020 (2013)
- UNDP Evaluation guidelines on pages 11 to 17 and evaluation ToR template on page 38
- How to draft the Terms of Reference by EvalPartners with other learning resources
- Writing terms of Reference for an Evaluation: a how-to guide by the IEG and the World Bank
- UNEG Quality Checklist for Evaluation ToR and Inception Reports – an example of a quality checklist

B.10 Inception report template[30]

The suggested content for an evaluation inception report is as follows:

- Objective and scope of the evaluation
    - Origin of the evaluation
    - Delineation of the evaluation's scope
    - Objectives, priorities, and stakes
    - Expectations expressed in the terms of reference
    - Evaluation process, principles, and ethics.
- Project Intervention Logic
    - Translation of objectives into expected theory of change/intervention logic
    - Analysis of the intervention logic and of its internal coherence, proposal for bridging gaps in the cause-and-effect assumptions, proposal for indicator revision.
- Methodological design of the evaluation
    - Evaluation criteria and questions, explanatory comments as relevant
    - Design, approach, methods, and tools for collecting and analysing data (desk and field work)
    - Link between the two above bullet points to be outlined in an evaluation matrix in annex.
- Proposed work plan for the evaluation process
    - Updated workplan
    - Updated list of persons/institutions to be met.

Annexes should include (indicative list)

- Evaluation matrix
- Workplan / Gantt diagram/ Itinerary
- Documents used
- Interviews / group discussions conducted
- Terms of reference
- Acronyms and abbreviations
- Others.

[30] Source: EC Evaluation Methodology references, adapted

B.11 Project evaluation report template[31]

The structure of an evaluation report should include:

- **executive summary**: tightly drafted, and usable as a free-standing document, max. 5 pages long, with a focus on the main analytical points, conclusions, lessons learned and specific recommendations. Cross-references should be made to the corresponding page or paragraph numbers in the main text that follows;
- **introduction:** describing the context, the project to be evaluated, the evaluation objectives, questions, methodology and its limitations (with detailed methodological notes in annexes);
- **findings**: describing and analysing key (evidence-based) facts in accordance with the evaluation questions, along with key influencing factors;
- **conclusions and recommendations**: conclusions of the evaluators need to be separated from the findings. Recommendations should be as realistic, operational, and acceptable by stakeholders as possible. They should link to specific conclusions. Each recommendation should be targeted at a specific audience (project staff, donor, etc.);
- **annexes:**
  - Terms of Reference of the evaluation
  - Names of the evaluators and their companies
  - Evaluation methodology (phases, methods of data collection and data analysis, sampling. Checklists, survey results, etc.)
  - Logical Framework matrices (original and improved/updated with latest/final values of indicators)
  - Evaluation matrix
  - Map of project areas, if relevant
  - List of persons and organisations consulted
  - Literature and documentation reviewed
  - Other technical annexes e.g., statistical analyses
  - Others as deemed useful e.g., photos.

Total length is recommended at 25 – 35 pages excluding annexes

TIPS FOR **EVALUATION REPORTS**

- ✪ Use quotes, examples, images, graphs, or tables (put long ones in Annex).
- ✪ Consult preliminary findings and conclusions, co-design recommendations with your stakeholders. This helps in developing correct data interpretations, realistic recommendations, and commitment to act upon them.
- ✪ See project evaluation quality assessment grid below for further tips.

[31] Source: Aid Delivery Methods, adjusted

B.12 Project evaluation quality assessment grid

The quality of an evaluation may be checked at different levels:

- the Terms of Reference (see suggested template above)
- the Inception report
- the evaluation process (see national and European evaluation standards)
- the Evaluation report
- the dissemination and follow-up of the evaluation (see Chapter 7).

Implementers may use the following **checklist for the inception report quality** during the inception stage of the evaluation.

1. Meeting needs: does the report adequately address the information needs of the project consortium and fit the Terms of Reference? Are the evaluation questions and criteria clearly linked to the evaluation purpose and use? Are key terms accurately defined?

2. Relevant scope: does the report describe the evaluation scope, and does it justify the choices made to delineate it? Is the rationale of the project and its results planned to be examined fully, including both intended and unexpected outcomes and impacts?

3. Defensible design: is the evaluation design appropriate and adequate to ensure that the full set of findings, along with methodological limitations, is made accessible for answering the main evaluation questions? Are choices for the design, approach, and methodology for data collection and analysis discussed and defended against other options?

Implementers may use the following **checklist for the project evaluation report quality** during the final stage of the evaluation.

1. Meeting needs: does the report adequately address the information needs of the project consortium and fit the Terms of Reference?

2. Relevant scope: is the rationale of the project (background) and its results examined fully, including both intended and unexpected outcomes and impacts?

3. Defensible design: is the evaluation design appropriate and adequate to ensure that the full set of findings, along with methodological limitations, is made accessible for answering the main evaluation questions?

4. Reliable data: are the primary and secondary data selected adequately? Are they sufficiently reliable for their intended use? When statistical data are missing, are qualitative data meaningful? When only weak data are available, the evaluators have explained their weaknesses and the limit of use.

5. Sound data analysis: is the analysis of quantitative and qualitative data appropriately and systematically done so that evaluation questions and criteria are informed in a valid way? Are cause and effect links between the projects and its results explained? Are external factors (including alternative explanations) correctly taken into consideration? Are comparisons made explicit?

6. Credible findings: are findings justified and do they logically from the and are justified by the data analysis? Are findings based on careful described assumptions and rationale? Are they clearly linked to evaluation questions?

7. Valid conclusions: are conclusions linked to the findings? Are conclusions based on the evaluation criteria and questions? Are conclusions clear, clustered, and prioritised?

8. Useful recommendations: are the recommendations linked to the conclusions? Are they fair, unbiased by personal or stakeholders' views, and sufficiently detailed to be operationally applicable? Are they clustered and prioritised? Are they acceptable to those targeted?

9. Clear structure and content of the report: does the report describe the intervention being evaluated, including its context and purpose together with the process and findings of the evaluation? Is the report easy to read and has a short but comprehensive summary? Does the report contain images, graphs, and tables?

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B.13 Information and communications technologies (ICT)

Information and communications technologies (ICT) are indispensable in MEAL. The list of ICT tools below is meant to inspire DEAR implementers to explore different opportunities. At the same time, projects need to be aware of risks related to the use of ICT, including different biases e.g., self-selection, exclusion of people with limited access or ability to use the ICT) and look for ways to address these e.g., use simple, well-known ICT).[32]

TIPS FOR **ICT tools in MEAL**[33]

Project data management and reporting

- Set up an integrated online reporting system to be used by all project partners who can access and input their data.
- Among the existing systems used by DEAR projects, one is based on the platform IRIS that, via Cognito forms, automatically selects indicators corresponding to single activities. Data is then consolidated into a database, which is translated into a PowerBI Dashboard, integrated in MS Teams.
- Connected to it, a shared repository system is used by all project partners for storing information and materials.
- Other projects rely on G-Drive, combining different tools (forms, storage, collaborative documents) to collect, organise, and store information.

Remote group facilitation

- Zoom and Microsoft Teams (ADD) are the most frequent tools used for any group discussions, Focus Groups, etc. They now enable complex meeting settings, including breakout rooms and interpreting.
- Miro, Mural or EasyRetro are remote whiteboards useful for steering group or other stakeholder meetings, evaluation workshops, focus groups, outcome harvesting, etc.
- Welphi, Mesydel or eDelphi specifically support the Delphi method.

Surveys

- SurveyMonkey, SurveyHero, GoogleForms (with Google Studio for data analysis) and MS Forms are examples of online survey solutions. The first two enable simple multilingual surveys with automated data analysis in a primary language.
- KoBoToolbox, SurveyCTO, Zonka, SurveySparrow or SurveyMonkey's Anywhere offer offline data collection and online processing.

Remote collection of stories or scenario planning

[32] Based on EvalCrises Lessons Learnt (upcoming publication)
[33] Idem

- Sprockler supports story-based inquiries, collect stories face-to-face, via mobiles or web as text or audio, analyse stories and report them in an automated visualiser. It can be used e.g., for Outcome Harvesting.
- Parevo is an online platform for participatory development of scenarios and is being explored as a possible alternative to Delphi method. Collecting stories of change e.g., The Most Significant Change is yet to be piloted here.
- SenseMaker enables crowdsourcing, i.e., collecting and synthesising stories from a big population, including 'what' happened and 'why' to understand complex contexts and changes.
- MassSense enables crowdsourcing, i.e., reaching a large population to gain insights into their attitudes, to test a scenario or a campaign message.)

Data analysis and visualisation

- Quantitative data analyses may be performed in Excel, Google Studio, or statistical packages such as SPSS, Atlas.ti, MAXQDA and other software that may help with qualitative data analyses.
- Tableau is used for data visualisation as well as Outcome Mapping.

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“Establishing systematic M&E is about establishing a culture, a way of thinking where reflection and learning become part of the everyday way you work.”
[Anne Garbutt]

The main rationale behind a shared MEAL framework (Monitoring, Evaluation, Accountability and Learning) is to ensure a common understanding of the DEAR Programme achievements.

This document provides guidance to anyone involved in the implementation of a DEAR-funded project or direct grant.

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