

**Deliverable Number 15:**

Minutes of Core Group Meeting (CGM) 4

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**Project Funding**



**RTD Partners**



**University of Brighton**



Univerzita Karlova v Praze  
Charles University in Prague

**CSO Partners**



### CONSORTIUM GENERAL MEETING (CGM) 4

**Present:** Arthur Dahl (Meeting Chair);

Alliance of Religions for Conservation (ARC): John Smith;

Earth Charter Initiative (ECI): Alicia Jimenez;

People's Theater: Curtis Volk;

European Bahá'í Business Forum (EBBF): Daniel Truran; Serge Thill

Charles University (CUEC): Tomáš Hák, Martin Zahradnik, Svatava Janoušková;

University of Brighton (UoB): Marie Harder, Gemma Burford, Elona Hoover, Ismael Velasco, Julie Carter (only Tuesday)

**Date:** 9-10 November 2010

**Where:** University of Brighton, United Kingdom

**Meeting Start:** 9am Tuesday 9<sup>th</sup> November

**Meeting Close:** 6pm Wednesday 10<sup>th</sup> November



## **Minutes of Core Group Meeting (CGM) 4:**

### **1. Introduction and project envisioning**

Prof. Arthur Dahl welcomed the Consortium to the last Core Group Meeting for the ESDinds project at Brighton.

In light of questions and comments from the CSO partners prior to CGM4, Prof. Marie Harder presented, to the group, an interpretation of how to describe the unique and exciting features of ESDinds: first, the project outputs provide CSOs with a new vocabulary to say what is important to them, and second, they can tell this to funders, who might be interested but will then acquire this new vocabulary as well.

### **2. Overview of main ESDinds research questions**

The researchers were asked to briefly present the headline responses to the main research questions identified at CGM3. This helped to distil essential points from the research and identify where more clarification is needed in order to communicate project findings to a wider audience.

Values control: The field visit to Farad Investment Advisor was designed as a control to determine whether the indicators developed are truly expressions of values. Although much of the values vocabulary was new to the company, the indicators triggered discussions about values in an openly non values-driven context.

Relevance to different cultural contexts: Presentation of the results from the field visit to the IFRC Youth Summit in Jordan led to a short discussion on the importance of the cultural relevance of the ESDinds indicators. Although the indicators appear to be widely relevant across the 35 countries represented in the field visit sample, the group noted that this is only just scratching the surface, as the ESDinds project is based on a narrow 'sample' of CSO types. The group also highlighted the potential relevance of ESDinds indicators for marginalised groups and indigenous communities in helping to get their voices heard. While ensuring the widest possible relevance and usefulness of the ESDinds evaluation process is not in the scope of the ESDinds project, the group agreed that these questions must be raised and noted.

Scaling up and mainstreaming: With insight from the second field visit to the University of Guanajuato, the group discussed key factors in scaling up the evaluation process in larger organisations, including commitment from those involved and a suitable point of entry within the organisation's hierarchy. The group noted overlaps with behaviour and cultural change practices and theories, and the challenges of using an instrument like WeValue, especially in an institutional setting. For instance, EBBF noted that WeValue would not necessarily be suitable for all businesses in their organisation.

Relevance to Faith-based organizations: The relevance to Faith organisations will be addressed in a final field visit after CGM4, with a Muslim community in the UK. In collaboration with ARC, UoB will engage with a Mosque (East London Mosque) rather than an Islamic CSO, and work in tandem with other Muslim communities across the country to contextualise the research.

It was noted that the ESDinds project partners should recognise the limitations of the initial Phase 1 sample in terms of input from Faith communities. These limitations might lead to the need to develop new indicators altogether; however, it was agreed this was beyond the scope of the field visit. One key research question in the field visit would be language, understanding how the indicators take meaning in different contexts and thus how their description might have to change accordingly.

Two-way mapping: Results from the field visit in Jordan, combined with information gathered during other field visits, suggest a very complex relationship between values and indicators. Values appear to be extremely varied when defined at a personal level, but gain different meanings and importance when examined and defined within a group or community. This topic underlines important issues of vocabulary, shared values and communication which lie beyond the scope of the ESDinds project itself but could be addressed in any follow-up work.

The Phase 1 Development of ESDinds Indicators: Marie Harder gave a brief presentation about the research process in the first phase of the ESDinds project. This was important for the CSO partners to have a good understanding of the soundness and validity of the research and to be able to communicate this to colleagues, partners and the wider public.

Issues of Validity in the social sciences: The research team has established the scientific validity of a number of indicators developed in the ESDinds project, acting as a proof of concept. A brief presentation was given to

the CSO partners to further reflect on the importance of checking validity in any further applications of WeValue.

Contextualising the ESDinds values: The Consortium briefly discussed different values models, exploring how the ESDinds project is distinct from most existing strategies for measuring values because we did not seek to define a conceptual framework for values but created indicators based on real-life experiences from CSOs. It was noted that there is a wealth of models for measuring or evaluating values, and it is important that the research team is helping to position the project within these frameworks.

Positioning the ESDinds indicators: The group discussed the paper prepared by CUEC presenting the link between ESDinds indicators and (i) Sustainable Development Indicators (SDIs) (ii) Quality of Life and wellbeing indicators, and (iii) indicators for education generally, and for Education for Sustainable Development (ESD).

Main themes emerging from the discussion include:

- Recognising that one of WeValue's distinctive features is that it is an interactive process from which data can be derived (qualitative and quantitative)
- There is a clear link to Education and ESD as WeValue triggers a process of transformational learning
- ESDinds indicators work at the level of the community. The term 'community' must be defined, but this could be a local community or a governmental body, drawing out different ways of scaling-up WeValue
- ESDinds indicators give us information about local dynamics, which are crucial, especially in the changing contexts of Civil Society Organisations in the UK and Europe
- Most SDIs (on an international level) focus on quantitative aspects of human life; national and local level SDIs also focus on qualitative aspects of human life but systematic qualitative approaches are still underdeveloped. A small number of values-based indicators in SD combined metrics (aggregate indicators and indicator sets) can also be found, but WeValue could pioneer rigorous and systematic qualitative values-based SDI measurements.

Processes: The research team explained that the term 'processes', broadly defined at CGM3 as the interactions between groups and individuals at different stages of the ESDinds project and field visits, has been more clearly defined and divided into two distinct concepts.

(1) Processes in project monitoring and evaluation: studying what was done, how, by whom and to what effect (presented using a logical diagram developed by CUEC).

(2) Participation: looking at who participates, the extent of participation, and how well it is done.

Both concepts have links with emerging fields in academic research, but are not a priority for the project's research outputs as we only have anecdotal evidence from our experience. However, examining these areas will be crucial in future, in order to understand the success of WeValue and link to current discourse and practice in public sector and non-governmental organisations.

### **3. CSO partner activities**

The Consortium discussed main activities carried out by the CSO partners during the last phase of the project.

#### ***a) Alliance for Religions and Conservation (ARC)***

Research: ARC approached the World Council of Churches and the Taoist community in China, the latter through an established Chinese academic based in the UK. Both attempts proved to be limited by different operational timescales and the bureaucratic nature of the World Council of Churches. The Consortium agreed there would be scope to explore these opportunities in the longer term. In a final attempt to engage with a faith-based community, ARC is working with researchers to carry out fieldwork with a Muslim Community in the UK.

Dissemination: ARC will also provide expertise and support for developing a more user-friendly version of the WeValue toolkit.

#### ***b) Earth Charter Initiative (ECI)***

Research: ECI is continuing to use the indicators to evaluate the online e-GLO course, and results from the first evaluation were used to make positive changes in the course structure and delivery. ECI staff participated in field visits held with ECI partners in Mexico, and are following up with those CSOs (among the 50-80 involved with WeValue) that are ECI affiliates.

Dissemination: Creation of a mini website about ESDinds and WeValue on the ECI website, global newsletter publications, presenting the ESDinds project at the ECI +10 conferences in India and Jordan, and the UNESCO meeting in Panama, translation of key documents for Spanish-speaking ECI affiliates.

### **c) European Bahá'í Business Forum (EBBF)**

**Research:** EBBF, through Serge Thill, has been engaging with five organisations in the last phase: Moulton College (UK), Farad Investment Advisor (Luxembourg), Alexander Pavlov, Public Notary (Bulgaria), Epoch International (Dalian, China) and AIESEC (France). The work with Epoch International is being done remotely, and Serge has not received a response from AIESEC yet.

The work carried out by EBBF highlights the difficulty and importance of the process of indicator selection, which can be problematic in a business environment where there might not be as much participation due to time pressures and hierarchical dynamics. Furthermore, indicators are often selected according to what an organisation would like to find out, rather than what it already does; for instance, in Farad, those indicators linked to the regulatory environment were discounted.

**Dissemination:** Disseminating information about the conference through various channels, facilitating the link with Anderton & Boyd, and identifying key marketing and communications strategies to engage businesses in WeValue.

### **d) People's Theater (PT)**

**Research:** PT has started to internalise the ESDinds process within the organisation by collectively defining a value and deriving indicators from the exercise. PT plans to start the evaluation in early 2011 and then do the same work with all of the organisation's values in the coming year.

The work carried out by PT shows the process of going from values to indicators, and later from indicators to assessment, in a small organisation. It will be crucial to document all the steps involved and create a narrative of how a small CSO went about doing this.

**Dissemination:** In collaboration with CUEC, PT developed a questionnaire to ask their alumni about the values they consider important in the organisation, which is now an additional tool on WeValue.

#### **Actions for CSO partners:**

- All CSO partners are to submit a brief summary of their activities by December 2010.
- PT to carefully document all procedures and processes undertaken in developing indicators and testing them
- ARC to continue collaboration with UoB on fieldwork with Muslim Community in UK.
- EBBF to extract insights gained from research experience, identify any outstanding questions and help formulate how WeValue applies to the business context.
- ECI to think about how affiliates can share experience with local Red Cross and Red Crescent Societies, especially when in Jordan. Follow-up with UoB.

## **4. Engaging 50 to 80 CSOs**

A total of 71 organisations were sent information about wevalue.org, in addition to the international press release and information sent to local organisations. To date, 40 organisations have created profiles on WeValue. The group noted that several technical problems with the website have been limiting and possibly discouraged several organisations from signing up. Most have now been resolved, and a draft offline handbook has been put together based on the website content for those who have difficulty using the online platform.

The research team asked CSO partners to continue giving input for the content of the website and toolkit. It was agreed that any translations would be carried out after the final versions were completed, possibly funded separately.

Note on terminology: all project members to use WeValue for communicating and disseminating the ESDinds project outputs (Values, indicators and assessment tools).

#### **Agreed priorities for WeValue**

- Make sure the platform works – all partners to sign in and send detailed information on faults to Gemma
- Gather feedback from people for whom it has not worked
- Follow-up with all organisations contacted in the first instance
- Produce a well designed hard copy toolkit by the end of the project – this could include one complete version and a simplified version for small organisations
- All CSO partners to contribute to improving the toolkit content, both online and hard copy and send suggestions to Gemma
- ARC to lead on creating a visually appealing toolkit for publication

## 5. Conference - Making the Invisible Visible

### a) Objectives

In addition to building a community of practice around values, indicators and sustainability, the Consortium felt that the conference should also have more space for presenting both the outcomes of the ESDinds project and the way in which it was created.

### b) Structure

The Consortium agreed that more down-time and creative activities needed to be scheduled into the conference, albeit structured. In this line, People's Theater agreed to prepare a performance with their youth, which would be included in the programme. The group also discussed having Anderton & Boyd present WeValue.

The group then discussed contributions from all project partners more detail:

- EBBF: two presentations, Daniel and Serge to liaise with Ismael for delivery
- ARC: Martin Palmer (Values and faith groups); John Smith to lead workshop on project quality
- PT: theatre performance(s).
- ECI: Jeffrey Newman (more detailed about ECI), Alicia (experience of the project; incorporating indicators into an international CSO), Alide Roerink (ECI overview), Shafia Sucar (application of WeValue to a university, ESD, transformational learning, monitoring and evaluation)
- CUEC: Bedřich Moldan (SD indicators and values), Martin Zahradnik (validity in specialist session), Tomáš Hák (positioning from WeValue to indicators – sub-plenary 2<sup>nd</sup> day?)
- UoB: Gemma Burford (participatory evaluation), Ismael Velasco (generating participation), Marie Harder (headlines, ESDinds), Elona Hoover (WeValue taster session)
- Arthur Dahl (umbrella why the world needs values; wrap up)

### c) Logistics

It was discussed that all delegates should receive a small 'WeValue' introduction toolkit, including sample indicators and all CSO partners, at the least, should have a display in the foyer area.

Multimedia: the Consortium felt that it should be a priority to ensure the conference is adequately captured for online viewing. It was agreed that a small amount of funds (<£200) could go towards making this happen if necessary.

The group also agreed that adequate refreshments would be a priority.

### d) Budget

The group discussed which aspects of the conference could be covered by the remaining BASED-UK funds. Agreement was reached for the following:

- Accommodation and travel costs for Katrien Beekman from IFRC Values & Principles Unit
- Travel funds (£500 to £1,000) for a CSO member who participated in the field visit phases: proposed for Shafia Sucar, University of Guanajuato
- Catering costs
- Additional funds to be used for publications (book or handbook)

### Decisions:

- All CSO partners to have a stand/display
- All project partners to prepare contributions to the conference and liaise with UoB for delivery
- UoB to contact A&B with regards to potential participation
- Amend conference programme to include suggestions from CGM4, Marie Harder to lead
- Explore multimedia possibilities, priority to record and put the conference online
- Remaining BASED-UK funds to cover selected conference costs (travel, catering, publications)

## 6. Discussion on the future of ESDinds

This being the last Core Group Meeting, the Consortium discussed issues of communication, distribution, control and ownership with regards to the project's outcomes and outputs. The group discussed each partner's respective desires and vision in order to establish the best way forward. The Consortium also clarified that any further collaborations would be open to all those who have taken part in the project.

CSO partners: EBBF would like to continue sharing WeValue by offering a service which would be delivered by a member of EBBF (Serge Thill). ECI expressed a desire to continue using WeValue with their affiliates, but need more clear guidelines to do so. ARC is likely to be involved as and when possible. PT will continue to develop WeValue within their organisation but do not have capacity to spread the word more widely at the moment.

Research institutions: UoB are willing to put time towards sustaining WeValue, in view of future funding opportunities. Certain members of the research team will continue to be part of developments independently. CUEC would like to explore the link with education in future, but all work is project-based, so continued involvement will be largely dependent on funding.

The following points were agreed:

- All EU deliverables are public domain – but clarification is needed as to which elements are public, who will be able to access information gathered through the project, and how it might be used.
- WeValue cannot function as it stands: some sort of control is necessary in order to avoid abuse or misuse. An open Consortium is to be formed; formal responsibilities will be established and the group would be responsible for the future of the WeValue website and future legal status decisions.
- Some funds must be generated (through delivery or further funding) even if not immediately; but a pro-bono element must also be conserved for those less able to pay for such services
- Must establish the scientific rigour behind the process, including publishing key academic papers, and ensure this continues for any further developments beyond the end of the project

### **Decisions on the future of ESDinds**

- All partners to use the conference as a platform to explore future strands of work
- Research institutions to clarify exactly which elements of ESDinds are accessible, and to whom
- UoB to clarify ownership of WeValue with Anderton & Boyd.
- Draft two Memoranda of Understanding by December 15<sup>th</sup>, to be finalised in January 2011 (i) for ESDinds as a project, (ii) For the new WeValue consortium
- Research group to prioritise academic publications at researchers' meeting and report back to consortium. Keystone papers to be written by January 2011.

## **7. Project review and management**

### ***a) Review of work progress, achievements and project management***

The group agreed that the main project deliverable, to create values-based project level indicators and assessment tools, has been successfully achieved.

The Consortium agreed on project partner budget changes, and discussed the proposal to extend the project for an additional three months without additional funds. This would allow any remaining funds to be spent more effectively, and allow for wider dissemination, but would result in final project partner payments arriving at a later date. The group agreed to the extension.

### **Project management decisions:**

- EBBF: transfer budget for staff time to travel expenses. Expenses will include activities related to Epoch, Moulton College in addition to other field visits.
- PT: budget for staff time will contribute to travel for the conference. Consortium agrees for PT to cover conference travel expenses for PT youth involved in the performance.
- ECI: A portion of staff time has been transferred to travel expenses, c.f. last agreed budget.
- UoB: BASED-UK first phase funds contributed to first Guanajuato field visits, Echeri, ECI remote project contributions and field visit to Jordan. Total costs of c. £20,000 amount to phase 1 and 2 BASED-UK funds. Third portion of BASED-UK funds will contribute towards agreed conference expenses (£10,000): Shafia £500 to £1,000; tea and coffee; possible additional conference attendee to £1,000; additional web development if needed; leftover may contribute to book or booklet production. Additional amendments have been noted to pay additional travel for research teams between Prague and Brighton. Amendments have been sent to the EU and accepted.
- CUEC: noted amendments were also made to cover travel for research teams between Brighton and Prague.
- All CSO partners to bring draft claim form to the conference, for review before finalising in January.
- Project to be extended for an additional three months if possible

### ***b) Reflection on collaboration between CSOs and research institutions***

The project's independent advisor, Arthur Dahl, noted that all partners seem happy with the collaboration. Discussions and remarks on collaboration emerged through other discussions within the Core Group Meeting.

CUEC noted the excellent experience of working with CSOs, an unusual experience for their group, and the importance of experiencing different types of collaboration with different types of organisations over diverse periods of time.

ECl felt that the project was a very good example of collaborative research, both in terms of the solidity of the research and participation of CSO partners, and hoped for some collaboration to extend beyond January.

John Smith noted that this was an extremely successful collaborative research project between Universities and CSOs, and the project design and management was important in order to achieve this. The importance of developing more successful partnership projects between Universities and CSOs in the future was also noted, and the importance of learning from our experience.

The group discussed the possibility of documenting how the collaborative work developed, if only to capture this experience for the EU. The group also noted that this issue is of particular interest to Gemma Burford, and would contribute towards work for her PhD. It was agreed that partners would arrange time with Gemma in December to document this where possible.

## **8. Summary of decisions made at CGM4:**

### ***a) Agreement on project priorities until January 2011***

- Research partners to define priority academic publications and ensure all research outputs are clearly documented
- CSO partners to continue dissemination activities
- Consortium to draft two Memoranda of Understanding, (i) for the ESDinds project beyond January 2011 and (ii) for a newly formed WeValue Consortium. Marie Harder and UoB to lead
- UoB to confirm whether the project can be extended for an additional three months
- Complete administrative compliances, UoB to support CSO partners

### ***b) Project dissemination***

- All project partners to prepare contributions for the conference
- UoB to ensure conference presentations are made available remotely
- Ensure WeValue web platform is fully functional
- Complete hard copy toolkit with CSO-friendly design

### ***c) Report on Gender Issues and the Balance of Faiths (ECl and ARC)***

Statement on faith bias – The Consortium has made conscious efforts to include Faiths in the last project phase and much thought was given to these engagements with constant input from ARC members. This has included a 'Faith' pathway in the WeValue website, and will be pursued after CGM4. Researchers also showed sensitivity to the subject of faith when time allocated for preparation was not adequate, preferring not to gather faith-specific data in Jordan.

Statement on gender bias – For the first time during a field visit, researchers raised the question of gender issues during a field visit although no issues were identified by the organisation; the act of raising the issue during the field visit actually made some members of the organisation recognise the importance of addressing something they had perhaps taken for granted. The Consortium also noted that a large number of CSOs in the two field phases chose gender-related indicators for evaluation. This has also led to some of the project dissemination material referring explicitly to gender-related indicators. No gender bias has been reported in the research process.