

Values-Based Learning Toolkits

Measuring What Matters

Values-Based Indicators



A Methods Sourcebook

MEASURING WHAT MATTERS: Values-Based Indicators

TOOLKITS OF VALUES-BASED ACTIVITIES AND INDICATORS
FOR EDUCATION FOR RESPONSIBLE LIVING AND SUSTAINABILITY

Methods Toolkit : *Measuring What Matters - Values-based indicators*

Student Toolkit: *Discovering What Matters - A journey of thinking and feeling*

Staff Toolkit: *Growing a Shared Vision - A toolkit for schools*

Prepared for the Partnership for Education and Research about Responsible Living (PERL) with financial support from the European Union.

Based on the **WE VALUE** methodology derived from the ESDinds Project, an international research project funded in 2009-2011 by the European Union's Seventh Framework Programme and conducted by a project consortium consisting of the following partners:

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Charles University Environment Center, Charles University, Czech Republic

Civil Society Organisations:

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Earth Charter Initiative (ECI)
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COVER: "True Colours" © Gemma Burford, 2014

First edition September 2014

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DISCLAIMER: With the support of the Erasmus Academic Networks of the European Union. This project has been funded with support from the European Commission. This publication reflects the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



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Foreword

The world today is facing enormous challenges, including an economic system that is increasingly unstable, favouring the extremely rich while failing to meet the material needs or to provide employment for a major part of the world population, especially the youth. The social system suffers from rising social exclusion, inequality, corruption, insecurity and violence, threatening social instability. At the same time, a complex set of environmental crises ranging from climate change to resource depletion, food insecurity, and the health impacts of pollution show that there are planetary limits that we exceed at our peril.

To the individual, and most particularly to today's students, these problems seem overwhelming large and beyond reach. It does not seem that individual efforts to address these problems can make any difference. Yet they are the cumulative result of the individual choices and decisions of over seven billion (thousand million) human beings. If enough people make changes in their lifestyles and consumption patterns, the impact can be significant.

There are three possible reactions to such challenges: denial, depression, or action. It is easiest to deny the science and pretend the problems do not exist. But if the reality is too evident and there is no outlet for the emotional tension, the result can be hopelessness and living only for today, ignoring tomorrow. As teachers trying to help young people to discover and fulfil their potential, neither of these is a desirable outcome.

The Challenge for Education

The challenge for education is to overcome the knowledge/action gap. People know that something they do is bad, and threatens their future, but this does not usually lead to action. Education also has to work at the level of emotions and values to build motivation for change. With the help of inspirational teachers and their own inner values, students can choose to contribute to the 'Great Transition'. Little by little, one day at a time, they can learn to build communities that are fairer, more caring, more peaceful, more respectful of the Earth and its limits, more creative, more values-led... more *sustainable*.

The generation we are teaching today will eventually be tasked with getting humanity through these crises. We need to train them for jobs that don't yet exist. We need to equip them with skills that we might never have been taught – like the ability to understand complex systems, see situations from different viewpoints, resolve conflicts without violence, or relate mindfully and joyfully to the natural world.

What is Values-Based Learning?

The Values-Based Learning toolkits result from an international project which aims to inspire people to understand 'achievement' and 'success' in new ways - not just in terms of exam grades, but in terms of **acquiring the skills and values needed to survive and thrive in the 21st century**.

The Partnership for Education and Research about Responsible Living (PERL) is a group of educators and researchers who have spent more than a decade learning about the **values** at the heart of sustainable schools and societies. These values include, among others, *trust, compassion, creativity, empowerment, and care and respect for the community of life*.

This research has been used to create a set of Values-Based Learning activities and assessment toolkits for secondary school (high school) teachers and students. There are three toolkits that are complementary in their uses:

Measuring What Matters - Values-Based Indicators: While values underlie much of human behaviour, they have long been considered intangible and unmeasurable. New methods and indicators pioneered by a European Union-funded research project show how

values are expressed and can be measured. This module explains the background and approach for those who want to create their own indicators adapted to their needs.

Discovering What Matters: A journey of thinking and feeling: To what extent have students already acquired the **values**, as well as the skills, knowledge, attitudes and personal qualities, which will enable them to survive and thrive in the 21st century? Can they understand more clearly what their own values are, and learn to live by them? In which areas do they need more help? This toolkit includes both a menu of indicators and examples of activities ready to use. It can be used directly by student groups.

Growing a Shared Vision - A toolkit for schools: Are we 'walking our talk' as educators? Is our school a living example of a vibrant, sustainable community? Do we provide a supportive learning environment for staff and students, and empower them as agents of positive change? This toolkit provides tools to assess whether the educational environment we create for our students facilitates acquiring responsible values.

How does it work?

The toolkits include different levels of **values-based indicators**, one for individual students or teachers, and the other for school evaluation. Participating teachers, students, parents and/or administrators work together to choose a few useful and relevant indicators. The wording of the indicators can be changed if necessary, and suitable measurement methods are then identified.

One important aspect of Values-Based Learning is that it is not about being judged by outsiders, or trying to meet criteria that have been set by other people. Instead, it is a learning journey where teachers, students and friends of the school work together to take stock of what has already been achieved – in terms of those **intangible, values-related 'achievements'** often missed by national exams and inspections – and what is still needed.

This toolkit provides an introduction to values-based learning as revealed through the design and use of values-based indicators and activities. It shows how values, which have long seemed intangible and unmeasurable, are reflection in actions that make them visible. They can become an assessable outcome of the educational process. It will be particularly useful for those who want to understand the approaches behind values-based learning, and who may want to design their own indicators and activities to respond to a specific need.

1. Introduction

The ultimate purpose of education for responsible living and sustainability is to help people to become responsible consumer-citizens, respectful of society, the planet and its boundaries. In particular, the pre-adolescent and adolescent years are a critically-important time when young people are discovering their potential and forming their own values and purpose in life. The skills they need to acquire include the ability to think critically about world problems and the self-motivation to adopt responsible lifestyles and consumption patterns.

Educational activities in support of this aim generally include **scientific information** on the state of the planet and its resources, the challenges of climate change, biodiversity conservation, food and water security, pollution control, and other environmental problems, and need for our civilization to remain within planetary environmental boundaries. They should also cover **social science perspectives** on the human population, its consumption patterns and social and economic disparities, and the need for social justice with an equitable and sustainable distribution of the limited resources available to the world population. The techniques for evaluating this scientific knowledge are well established, and are not covered here.

However **scientific knowledge in itself is usually not sufficient to change behaviour**. This is sometimes referred to as the **knowledge-action gap**. People often **know** what they should do, but they **still do not do it!**

Motivation and commitment are generally rooted at a deeper level of **emotions and values**, and formal education has always had a responsibility to inculcate the fundamental values of a nation and culture in each new generation of citizens.

Today the emerging global challenges of sustainability mean that every student, in becoming a citizen of the world, needs to learn the values, rights and responsibilities necessary to live in harmony with other people and with the natural endowments of our planet - and to ensure that the planet's capacity to support human life comfortably is preserved for future generations. The recent development of **values-based indicators** now provides the possibility to measure the effectiveness of education at this deeper level of values and thus to raise its visibility in the curriculum.

This values-based indicators toolkit was derived from multiple data collection and analysis activities over a period of several years. The initial methodology, indicator set and handbook that provided the inspiration for this project were created through the 2009-2011 ESDinds project (Annex 1), which focused on non-formal education for sustainable development (ESD) within civil society organizations, and was funded by the European Union's Seventh Framework Programme (FP7). Subsequently, in a follow-up study at the University of Brighton, further interviews and surveys were conducted with educators in the UK, Ireland and Tanzania to identify additional proto-indicators that might be suited to formal as well as non-formal education contexts. The first drafts of the toolkit drew on both of these projects, as well as a survey of PERL workgroup members and a content analysis of text from *Nature and the Human Soul* by Bill Plotkin (New World Library, CA, 2008). The 63 proto-indicators in this draft toolkit are comprised of 52 which were prioritised by members of the workgroup, and a further 11 which were rated highly in a survey of four secondary school teachers in the UK and France. Initial trials in secondary schools have followed, and are on-going.

This set of PERL toolkits is a first attempt to make these new tools available to teachers in the formal education system and similar informal learning/educational situations. This toolkit has been designed to make it possible for teachers to develop

their values-based indicators and use them independently, without the assistance of an adviser, but if you need limited help, you can contact the Sustainable Development Coordination Unit at the University of Brighton: sdecu@brighton.ac.uk.

It is important to note that these indicators do not impose any particular set of predetermined sustainability values, but should help a school or a teacher to select the assessment tools most relevant to their own curriculum, and their own environmental, social, economic and cultural context.

This toolkit offers a systematic way of working to select or design relevant indicators. You will adapt the process to your own needs and opportunities, but the basic workflow suggested is:

- Select and adapt the most relevant indicators for your situation
- Decide how to measure
- Plan and carry out the first measurements
- Link indicators with values

Indicators are much more than a tool for measurement. They provide a vocabulary for communicating about values, and by making values more visible, they can crystallize new understanding and trigger transformational learning. These functions of values-based indicators are discussed in more detail in the toolkit *Growing a Shared Vision*.

What are Indicators?

An 'indicator' is anything that shows us (indicates to us) what is happening in a certain situation. For example, an alarm clock can indicate it is time to get out of bed. Observing how people outside are dressed indicates that the weather is cold and rainy, which means warm clothes and an umbrella are needed.

We use many different indicators every day: they help us to perform everyday actions, make important decisions, and avoid danger. They are often taken for granted - when water is boiling, we do not have to *think* about keeping our fingers away. But in some situations, choosing suitable indicators and finding appropriate ways to measure them can provide us with very useful information.

Indicators are used in a wide range of fields and activities, from environmental sciences to international development. They can be simple – for example, the number of trees planted, or the amount of money spent – or more complex, such as a project's 'carbon footprint', or the well-being of a community. The indicators in this toolkit have been designed to help you to measure the presence of *values*.

2. Values-based indicators

Indicators can help you **measure...**

...values-based things which you think are important.

Many people think that 'intangibles' cannot be assessed, like 'empowerment', or 'self-esteem', or 'emotional connection with nature'.

But these values-based indicators provide starting points and step-by-step guidance to help you assess those intangible, values-based things that are important to **your** educational activities.

The process of selecting indicators can help you **crystallize...**

... what your teaching really aims to achieve.

While learning to 'measure' values, most teachers realize that new things are important to them. They can consciously aim for educational outcomes that previously seemed intangible and beyond reach.

Values-based indicators can help you **communicate...**

to staff, pupils, parents and the wider society, about what your school or educational project hopes to achieve and what it can offer the world.

Civil Society Organizations* with educational activities can also use these indicators to show the rest of the world what they really think is important, and to demonstrate their effectiveness to supporters and donors.

Values-based indicators can help you **capture...**

...important skills & capabilities that are seldom seen as important in conventional assessment approaches, such as:

- how effectively students **work together** in groups
- how they **relate emotionally** to local and global environments
- the extent to which they **feel empowered** to effect positive change.

* We use the term 'Civil Society Organizations' (CSOs) in this toolkit to represent groups that are outside the public sector, e.g. local environmental and social groups, charities, non-profit organizations and social enterprises.

Perhaps even more importantly, values-based indicators can help you to **create ‘transformational learning’ situations...**

where participants internalize concepts of Sustainable Development in the broadest sense. It is generally acknowledged that achieving sustainability will require radical changes in human society to preserve and begin to restore the natural capital on which we depend. This in turn requires that each individual make the transition to a new relationship with ourselves, with other species, and with the planet that is our home, involving learning with head, heart and spirit (Mehlmann et al. 2010).

Values and indicators in education

Education is already strongly values-driven. Many schools and universities, and most civil society organizations that provide educational activities, already have a formal Mission Statement that refers explicitly to a list of specific values that they want to promote.

Most faith-based educational institutions also have very clear values, although they might express them in different ways - perhaps in relation to a Holy Book.

If your school already has a strong values focus, you might like to use the indicators to compare the values of the school as a whole with the personal values of staff and/or students, to see how much they overlap.

The indicators might also help you to evaluate the extent to which your school's values are really translated into action.

Schools in secular educational systems may never have thought much about values before. This does not mean that values are not there, only that they are invisible and people may not be conscious of them. The indicators can help to make these values visible, and in the process, to clarify your vision, mission, goals and priorities.

If your school does not yet have a clear values focus, you might like to start discussions or even formal workshops with other teachers with the aim of trying to reach a consensus about the school's values, before working with the indicators.

Alternatively, you could start with the indicators and let the 'values statement' emerge naturally as a result of that process.

3. Measuring with indicators

This toolkit presents a system of indicators that you can use to measure values (or things related to values) in your school or educational activities. It originated in a European research project to develop values-based indicators of education for sustainable development for use in civil society organizations (ESDinds). Information about the research project is included in ANNEX 2

This toolkit developed by the PERL project combines some of the original 166 indicators with others more specifically addressing the content of educational activities and the educational processes that can encourage values-based learning. This list has been designed to help you identify 'values in action' in your educational programme – using evidence based on what students and teachers think, feel, do and say, as well as things that can be observed directly – and to reflect on what they mean.

These are only suggestions. You are expected to end up with indicators and assessment tools that you consider your own. The toolkit will give you ideas to get you started; you will adapt them to your local context, or develop your own.

This toolkit is one of three, each of which can be used independently or in combination:

Measuring What Matters - Values-based Indicators: this introduction to values-based measurement and indicators, describing the origin and background of the approach and its use in schools.

Discovering What Matters: A journey of thinking and feeling: with values-based activities for students, providing tools for students (and teachers) to become aware of and cultivate sustainability attitudes, capacities and values.

Growing a Shared Vision - A toolkit for schools: with indicators for evaluating your school (or other educational organization), and the environment created by administrators and teachers to foster values-based learning in the students, or simply suggesting the kind of teaching environment you may want to create.

There are more indicators in the lists in ANNEX 1 than you can work with in any practical way. **You will need to select a limited number of indicators that are most relevant to your particular situation and the content of your educational activities.** After you've chosen the most relevant indicators, you can adapt them to suit your specific context, and choose which assessment methods work best for you.

The indicators can also help you and your colleagues to build a common language around values. By articulating attitudes or behaviours that you feel are important, they help you to identify learning outcomes that may not have previously been so apparent. You can then choose the term or value-label that is most relevant to your own context: engagement, participation, entrepreneurship, courage, etc. This gives you a clearer idea of what you want to achieve, and what educational success might look like.

4. What are values?

Values are enduring beliefs about which kinds of behaviour (and situations) are good, and which ones are bad; which aren't important at all, and which ones are essential for our own well-being and that of others.

Values don't change every day, or even every year. On the other hand, they can still evolve. They can be influenced, for example, by our friends and families; the cultures and environments of the places where we live; the religious or spiritual paths we follow; the jobs we do; the advertisements and commercial messages we see; and the lessons that we learn in life. Schools are one place with a formal mission to transmit values from one generation to the next, and teachers are often some of the most important role models for young people outside of the family.

Our values relate to whatever is *valuable* to us, individually or collectively – the things that give our lives their meaning. Some people value material wealth and 'things', which happen to be easy to measure. Others may value things that are less tangible like honesty, integrity, justice, courage, respect, or community spirit, which are often called *moral, spiritual, higher or ethical* values.



People who value material things generally do not have much of a problem deciding whether they're doing well or badly. It is easy to find out how much money you have in your bank account, and how much your property or business is worth. You can easily compare yourself with your neighbours or competitors, to see how you are doing. The same thing happens on a national and global scale: countries are ranked on the basis of the total market value of all the goods and services produced in a year: their Gross Domestic Product (GDP).

People who value intangible things face more of a challenge, though – and the fact that you are reading this toolkit suggests that you are one of them.

All over the world, individuals, communities, organisations and governments are deciding that money-based things are not the only things that count in life (which does not mean, of course, that they are not important). Governments and academics are finding ways to measure happiness and well-being. But if you value intangible things and want to teach them to your students, how do you know when you are doing well? How do you measure trustworthiness, love, self-discipline, friendliness

or patience? If your goal is to empower youth, increase social cohesion or promote democratic decision-making, how do you know if you've achieved it – or whether you've made a tiny bit of progress, or none at all?

That is where this toolkit can be helpful. We know that values-based Indicators can be really useful for different types of organisations, and can find a place in school programmes. The toolkit will show you how to use indicators to strengthen your educational activities, create shared understanding, boost morale, and learn new ways of learning and teaching.

5. A few questions that might have been worrying you...

Will our results be valid?

Yes, as much as you want them to be.

No measurement is considered rigorous if it is the only one that is made, so one thing you can do to validate the result is measure the indicators with more than one method.

For example:

- You might give a large group of youth a questionnaire to ask, “Do you think women and girls have equal access to information and decision-making in this organisation?” - and that would give you a pile of papers, with some answers on them.
- But a second method might be to observe how the youth interact with each other during an activity, specifically looking at how seriously the girls' contributions are taken during decision-making processes.
- A third method might be to speak with three or four of the girls on their own, or in a small group, and ask them for examples.

By having three different methods to measure this indicator, the final result would be considered rigorous.

But not everybody needs scientifically-rigorous results; you may just want a rough idea. It's your choice. It could depend on what you want the result for – the school board might be more impressed with several different measurements – but it also depends on time, and how many helpers you have.

Does it matter if we do not use questionnaires?

No, you can use any measurement method. Different measurement methods are described below, with examples. Whichever approach you take, you still need to make sure:

- (a) that everyone *really* understands the questions in the same way. Could a slightly different emphasis change the meaning of a question? Do you need to pre-test the questions with a small group first?
- (b) that students are not just giving the answers that they think you want to hear. Do they feel comfortable enough to tell the truth? Are there any indicators that are so sensitive that you need to keep students' answers confidential?

- (c) that students do not just 'follow the crowd' because they are afraid to show their real feelings in front of the group.
- (d) that pupils with the greatest difficulty making their voices heard, especially from marginalized groups, participate equally. Is anyone reluctant to speak in public, within a diverse group? Are there cultural barriers?

How do we know this is a legitimate system of indicators?

The values-based indicators were developed in a formal research project called ESDinds, which was funded by the European Union's Seventh Framework Programme (www.esdinds.eu). It involved academics in social sciences, environmental sciences, indicators and sustainable development, in partnership with four CSOs.

The method used to develop the indicators was rigorous, and can be found formally written up for academic journals. An initial set of relevant values and indicators was collected from several CSOs, and analysed using discourse analysis and coding (social science methods) (Podger et al., 2010). The indicators were tested in the field using action research methods (Podger et al., 2013). After several stages of analysis and consultations between CSOs and university researchers, 177 indicators were trialled in real CSO projects on the ground. Following further modifications, the current set was agreed. It will continue to be developed; see ANNEX 3 of this document for further details.

6. Getting Started with the Toolkit

Planning your Participatory Approach

You need to decide *who* to involve in selecting the indicators. You might like to bear in mind that, according to recent research, the people who benefit most from project evaluations are those who participate most extensively in designing, planning and making decisions (Jacob, Ouvrard and Belanger, 2010).

Think about everyone connected with your school – the **administrators**, the **teachers**, **parents** and **volunteers** outside the school, **governors**, and the **students** who benefit most directly from it. How can you involve them in choosing and using values-based indicators, so that they can share in the benefits?

In particular, think about students who often find it difficult to get their voices heard, whether because of their gender, ethnicity, disability, behavioural challenges or personality traits. If you make the extra effort needed to involve these students, it could lead to very valuable learning for everyone.

Then you need to decide *how far* you want them to be involved. For an assessment of students' learning, you will obviously start with the teachers, but the students themselves could be involved in selecting indicators relevant to them, or could even organize their own indicator activity as described in the toolkit *Discovering What Matters*. In some contexts, a wider circle including administrators, parents and volunteers could be included (Naylor et al, 2002).

You can choose the level that works best for you, taking into account the structure of your school (or equivalent), how many helpers you have, and how much time you have available.

Short-listing Indicators

The next step is for the people you have decided to involve to look at the relevant list of indicators and shortlist the ones that you think would be relevant for your school or educational activity. They can be ranked 3: essential, 2: desirable, 1: possibly useful or 0: not relevant. You can do this in a group, or give everyone a copy of the list and come together after everyone has made an initial selection.

Checklists of values-based indicators for use with students and for school evaluation are given in ANNEX 1.

Then go through the list of relevant indicators a second time and choose a few that are 'very relevant'. Do this by thinking about what's important for the success of your school or organisation, *not* about how comprehensive the list is or what might be missing. Do not worry, at this stage, about how you will measure the indicators – that will come later. Take your time with the short-listing step.

Adapting your Indicators to your situation

It might be helpful to think of the indicators in the lists as templates, rather than a finished product. Values-based indicators become more powerful if you adapt them to your own specific context.

After you've shortlisted the Indicators that look relevant, we strongly encourage you to adapt them to your specific educational activity. Here are some ways you can do this:

- Applying them at different levels (e.g. 'school', 'group', 'class' or 'project')
- Making them more specific, e.g. referring to a specific level or age group
- Changing words and phrases that are not quite right for you.

Be aware, though, that if you change the meaning of an Indicator too much, it might be difficult to link it to Measurement Methods.

Reflecting on your Indicator Shortlist

Once you have a shortlist of indicators that interest you and have personalised them to suit your educational activity, think about which of them you want to measure, and which Measurement Methods you can use.

Reflect on the following questions, first individually, and with the group of people that chose the Indicators:

- Why did we choose these particular Indicators?
- What makes them so relevant or important to us?
- Can we measure them all (bearing in mind our resources and time)?
- If not, which would we most like to measure, and why?

Remember that you are not committed to anything at this stage – it is no problem if you change your mind later, after looking at Measurement Methods.

If your school or educational activity already has well-defined values, you might already be able to see some links between your values and the indicators that you have chosen. Otherwise there will be another opportunity to think about it later, after measuring the indicators.

7. Measurement Methods

Values-based indicators can be measured in many different ways, from simple questionnaires and interviews to creative arts-based methods. You need to think about what each indicator means in your context, and how you can gather evidence that will enable you to say something meaningful about your school and your students.

Measurement is always a balance between the effort required to collect data and the usefulness of the results.

The more methods you use to measure each indicator, the more confident you can be about your results.

You might decide that for some Indicators, one or two methods are enough, while for others, you would like to try three or more. It depends what you want to use the results for.

Look at the indicators presented in this example from the toolkit *Growing a Shared Vision*:

Indicator
1. Students want to bring about change in their school and the wider community
2. Students have a sense of power that they <u>can</u> effect change in their school and in the wider community
3. Students understand mistakes as opportunities to learn and improve
4. Students explore issues that are slightly uncomfortable for them
5. Students participate actively in discussions about issues that affect their lifestyles

There are two different types of indicators here.

1. *How students feel* about themselves and their activities (indicators 1-3)
2. *What students actually do*, during their normal day-to-day activities within the school as a whole or within a specific educational activity (indicators 4-5)

Each type of indicator is associated with different measurement methods. Collecting evidence about how people feel is often an easier starting point than looking at what they do, although it will depend on your own particular context and the homogeneity of the group. Different cultures may have different ways of responding. Methods may also be different for students and teachers.

The following is an index of measurement methods to show you the wide range of methods available that can be adapted to almost any context. We also provide a hypothetical example of selecting measurement methods in ANNEX 2, to illustrate in some detail how the process can work in practice.

8. Descriptions of Measurement Methods

The Measurement Methods are organised as follows:

- 8.1 Guided Visualization
- 8.2 Document analysis
- 8.3 Focus groups
- 8.4 Indirect measures
- 8.5 Interviews
- 8.6 Key informants
- 8.7 Observation-based methods
- 8.8 Surveys:
 - Questionnaire
 - Secret ballot
 - Spatial and corporal survey
- 8.9 Theatrical comprehension test
- 8.10 Word elicitation

8.1 Guided Visualization

This method may be particularly effective if the script is read aloud by one individual to a group, which could include the Senior Management Team, other teachers, non-teaching staff, governors, parents and/or students. Each member of the group should be provided with paper and pens (ideally in a variety of colours) to make their own notes, mind-maps or sketches, while the script is being read out and/or immediately afterwards. The facilitator needs to read slowly and clearly, pausing for around 30 seconds at the end of each line. About 5-10 minutes can be allowed after the script reading for group members to finish capturing their reflections on paper, before a facilitated group discussion in which each person is encouraged to share their ideas in whatever way feels comfortable to them. The facilitator's role is crucial in seeking areas of consensus and drawing out shared values.

If people feel uncomfortable with the guided visualisation method, the text can also be used as a prompt for other activities, e.g. individual reflections expressed in writing or in any art form, non-competitive games, creation of collective art works (e.g. a group 'dreamboard' made through collage), or performance arts such as dance, drama and mime. It's important to remember, though, that the aim of this exercise is to stimulate right-brain (intuitive and creative) thinking, rather than the left-brain (logical and analytical) thinking that usually dominates school contexts. It shouldn't be allowed to turn into a debate in which people feel pressured to explain or justify their ideas. The text can be modified to suit your local context, e.g. by replacing 'school' with 'organisation'. See also section 9 below about linking indicators and values.

Sample 'Best-Case Scenario' script for guided visualisation

This is an exercise designed to stimulate creative thinking. Please feel free to write, draw or doodle anything that comes into your mind at any time while the script is being read out. If you prefer, you can just listen to the text with your eyes closed and then make notes after it's finished. Either way is fine – it's your choice. After I finish reading the script, I'll give you about [5-10] more minutes to capture your ideas, thoughts and dreams on the paper. The notes or sketches that you make are for your personal use, and you can choose what to share during the group discussion –you won't have to show your paper to anyone unless you want to, and nothing is going to be judged or marked.

Please start by picturing this school as you experience it now – think about the people, the places, the interactions, the learning experiences, and the feelings you associate with it.

Now picture the school in a 'best case' scenario, where things are happening in the way that you would ideally like them to be. Please feel free to be imaginative in your thinking and disregard any current constraints – this is your dream situation.

We will now take a few moments to explore your 'best case' scenario in more detail. Here are some prompts:

- *What is communication like?*
- *How do people relate to one another?*
- *How do people relate to the natural environment?*
- *How are decisions, plans and changes made?*
- *How are parents, governors and the wider community engaged in what the school is doing?*

Finally, please think about the values that come to mind when you envisage this scenario.

A Best-Case Scenario form is provided in ANNEX 4.

8.2 Document Analysis

Document Analysis is the systematic search for evidence about an indicator in documents related to, and/or produced by, the people or organization you want to learn about. Some examples of documents that might be useful for measuring certain values-based indicators are:

- The school's educational mandate, core curriculum and local curriculum
- Textbooks, Internet resources and other teaching materials
- Statements of individual or shared educational goals, e.g. those prepared during workshops
- Strategic plans or action plans
- The Teachers' Handbook and instructions
- Project reports, or the school's annual reports
- Promotional materials, such as brochures and web pages

8.3 Focus Groups

A **Focus Group Discussion** is a conversation involving a small group of people (ideally between six and twelve, although there are no strict rules) that focuses on selected topics of interest, in either an informal or a formal setting. Telephone conferencing, instant messaging or Skype can also be used. Usually, there is a facilitator who guides the discussion to obtain the group's opinions about specific

themes or issues. If the discussion isn't recorded for later analysis, you'll need a good note-taker as well as the facilitator.

Focus group discussions can be an excellent way of learning more about an issue that you've identified through another measurement method, such as a Survey or Structured Observation. They can provide insights into the reasons behind people's feelings and actions, or the reasons why they answered a question in the way that they did, as well as real-life examples of 'values in action'.

Focus groups can be made more interesting by including **Role-Play** exercises alongside the discussion. In one of our real-life case studies, for example, participants were asked to role-play examples of discriminatory and non-discriminatory situations, and how the former could be changed.

8.4 Indirect Measures

Using Indirect Measures to measure an indicator means gathering information in a systematic way that doesn't involve interacting directly with the people concerned. For example, absenteeism and staff turnover records could be used as Indirect Measures of people's morale at work, *if it were agreed that they reflected it*. Indirect measures were effectively used at Echeri Consultores (the Mexican school case study described in Annex 5). Having encouraged schools to establish tree nurseries, project coordinators looked at how well kept the nurseries were a few months later, and used that as an indirect measure of schools' adherence to long-term commitments to protect the environment.

Important: you need to be sure that the thing you're measuring is related to the Indicator that interests you. You will probably need to ask a number of people for their opinion, before you can *really* be sure about that. With indirect measures, it is often easy to jump to the wrong conclusion. You might look at the attendance records for an educational activity with a high drop-out rate, for example, and conclude that many students did not find the activity engaging – when, in fact, there was an outbreak of food poisoning and twenty students were ill in bed.

8.5 Interviews

An interview is a focused conversation between two people, in which one (the interviewer) asks questions in a systematic way and the other (the interviewee) answers them. Most people are familiar with interviews in the context of applying for jobs, but they can also be very useful for collecting information about Values-Based Indicators.

Interviews can be conducted face to face, over the telephone, through instant messaging, or via Internet. You may want to record them to be transcribed later, and/or take detailed notes. A **transcript** is a full written record of an interview.

Interviews can be very time-consuming, especially when there are a lot of people to talk to. If you only have a short time available, it's often helpful to pick a small number of Key Informants – people with special knowledge or personal experience of the subject being discussed, such as project coordinators or senior teachers.

An important issue is **confidentiality and anonymity**. If the interviewer is someone familiar, and especially if they're in a senior position, students or even teachers may be afraid to talk about what they *really* think and feel. For sensitive topics, it may work better if the interviewer is someone from outside the school who does not know the interviewees, provided that they can gain their trust and make them feel at ease. They might need to reassure interviewees that the school will only be given an overall summary of the results, not people's individual answers. If the subject matter is less

sensitive, the interviews could be done by a staff member who does not actually teach the students in question.

All interviews should be done on the basis of **prior informed consent**: telling the interviewee, before you start, what you are doing and why. In formal research projects, interviewing people under the age of 18 requires the informed consent of a parent or legal guardian as well as the permission of the interviewee. However, exceptions may be made in a school environment, provided that the interview is used only as part of an internal assessment for a learning activity (i.e. the data will not be shared with external researchers). At least two adults should be present in the interview, and any other relevant child protection policies issued by the school and / or national authorities should be carefully adhered to.

There are three different types of interviews:

1. Structured Interview – the interviewer asks a specific set of questions, in the same words and in the same order, to everyone that s/he interviews.
2. Semi-Structured Interview – specific questions are used as prompts for a broader discussion, but the interviewer can change the questions, omit some of them or add new ones, depending on who is being interviewed.
3. Unstructured Interview – the questions are not pre-planned at all, but emerge naturally during the conversation.

Some Indicators are very easy to convert to questions, but others require more thought, with ideally a group of people working together to come up with suitable questions.

If you have plenty of time and want to collect more interesting information, questions can be worded in an open-ended way. For example, instead of asking “Do you feel encouraged to express your opinions in class?” (to which many students would just say ‘yes’ or ‘no’), you could ask, “Can you give me any examples of situations in which you’ve felt encouraged to express your opinions in class?”

8.6 Key Informants

A Key Informant is an individual with unique knowledge or personal experience of the issues under investigation. This is often the most senior person available within a particular context, e.g. the Chair of Governors, Principal / Head Teacher, caretaker, bursar, activity coordinator, or student leader. However, not all key informants are leaders. A staff member or student belonging to an ethnic minority might have more insight into organizational attitudes toward minorities than other colleagues, while a teaching assistant or student prefect may know more about what really happens in the class than the teacher does; and a caretaker (janitor) may know most about how staff and students take responsibility for material resources.

For some indicators, all you need to do is ask the Key Informant whether the school has a particular policy or works in a certain way. Usually, though, an Interview or Survey Questionnaire will be needed to collect more detailed information from him or her about the topics that interest you.

8.7 Observation-based methods

Observation means watching out for something, usually a certain type of behaviour, in a systematic way. To be a valid and unbiased measurement method, observation should ideally be done by three independent people, who meet up afterwards to discuss their notes (then if there are differences of opinion, the ‘majority’ vote of 2/3

is taken as valid). You might decide, though, that an observation confirmed by two independent people is good enough for your purposes.

There are three different kinds of observation:

1. Structured Observation – looking out for specific, named behaviours
2. Semi-Structured Observation – looking out for a broad set of themes, although observers might also notice other relevant things at the same time
3. Unstructured Observation - observers have no preconceived ideas about what to watch for, but just ‘keep their eyes and ears open’.

Structured Observation

The word ‘structured’ means that the observers are very clear about what they are looking for. It usually means looking at a list of possible behaviours, watching people interact normally with one another, and ticking boxes on an **Observation Sheet** to record whether they behaved in those ways.

Sometimes it’s enough just to tick the box if you spot a particular behaviour, and leave it blank if you don’t. At other times, you might need to use scales (see the Surveys section 8.8 below). We wouldn’t recommend using a scale with more than three points, unless you’re observing a very small number of people.

To use Structured Observation effectively, you’ll need to think carefully in advance about which behaviours to watch for. The examples might give you some ideas, but a lot will depend on your school’s values and priorities. The understanding of what constitutes ‘following group norms’ or ‘making decisions in a transparent way’ in a class, for example, might be very different from that in a student association.

It’s often very interesting to compare the observers’ perception of a person with their own perception of themselves. This method is called **Structured Observation with Self-Assessment**. In one of our real-life case studies, for example, two staff members and an external observer completed the Observation Sheet; gave the same sheet to the youth for them to fill out by themselves; and then discussed the answers with individual youth in turn. The staff members and youth found these discussions very useful.

8.8 Surveys

Surveys are very similar to structured interviews, but instead of speaking their replies, people answer in a non-verbal way. This could be in writing, or by doing an action.

Sometimes, it’s enough for people just to answer YES or NO to a question. At other times, you might want to know how strongly they feel about something. To do that, you can use Scales (see below). Written surveys (questionnaires) can also include ‘open-ended’ questions, which people can answer in their own words.

There are several kinds of surveys, suitable for different situations. Issues relating to people’s values and behaviour are often very sensitive, so in some settings it might be important to make sure that the survey is anonymous and confidential, by using a questionnaire or secret ballot. In other organisations, spatial and corporal surveys (where students respond to questions by moving into different physical spaces or adopting different body postures) might be more appropriate because they fit in well with existing activities, e.g. youth workshops or arts-based activities.

The following table summarises the features of four different types of survey:

	Can it be kept anonymous and confidential?	Is it suitable for people who have difficulty with reading and writing?	Can it be used with large groups of people?
Questionnaire	Yes	No	Yes
Spatial Survey	No	Yes	No
Corporal Survey	No	Yes	Yes
Secret Ballot	Yes	Yes	Yes

Whichever type of survey you decide to use, it is essential to make sure that the questions are easy to understand before starting a large-scale survey. You might like to 'pre-test' the survey with a few students first, and then ask them about what they thought each question meant. If different students understand the survey questions in very different ways, the questions need to be reworded.

Questionnaire

A questionnaire is just a list of questions, to which people can fill in their responses – either by marking one of 2-5 possible answers ('closed-ended' or 'multiple choice' questions'), or by answering in their own words ('open-ended questions').

You might want to include a mixture of both types of questions. Closed-ended questions are quick and easy to answer, which might improve your response rate, as well as easy and quick to aggregate and analyze - but open-ended questions can often provide more interesting information, such as real-life examples.

Questionnaires can be kept entirely anonymous and confidential if the questions are very sensitive. If the survey is being conducted to assess learning outcomes, however, students will probably be required to give their names. You may need to reassure them that only the person collecting the data will see their individual answers (not their fellow students, other staff members, or their family).

If you need help with creating your Survey Questionnaire, or want students to be able to answer it online, you might find online tools very useful, such as Survey Monkey (www.surveymonkey.com) or Google Forms. These free external sites enable you to design secure online Survey Questionnaires and link them to e-mails, websites, Facebook pages, blogs, Twitter feeds, etc. They can also help you to invite people to do the survey; send reminders; view the results in real time; create tables and graphs; download a summary report; and/or share results with others.

When measuring Values-Based Indicators, it's often useful to follow up a Survey Questionnaire with a Focus Group Discussion or private Semi-Structured Interviews. These methods can provide valuable feedback on why people answered as they did, and help you to explore issues in more depth. You may decide that you'd like to do this when you see your first results – they often generate further questions that you would like to ask.

Secret Ballot

Secret Ballot is a way of adapting the survey method when you have the dual challenge of working with very young or non-literate students and needing to keep the answers confidential.

In this method, each person is given different coloured pieces of paper representing the possible answers (YES and NO, or a scale of different responses). When the question is read out, they choose the paper that best represents their answer, go into a different room to put it in a bag or hat, and put the rejected paper(s) in the bin. The 'votes' for each answer are counted.

It's sometimes useful to follow up a Secret Ballot with a Focus Group Discussion. Even if people don't want to talk about their individual answers, you may get some useful feedback on how they understood the questions and what they thought about them.

Spatial and Corporal Surveys

A spatial survey can be thought of as 'voting with your feet', e.g. 'Step to the left to answer YES, stay still to answer PARTLY, or step to the right to answer NO'. **To avoid confusion, we recommend a maximum of 3 possible answers.**

A corporal survey is a variation that is often easier to do in a confined space, or with a large group of people. Instead of being linked to a place, each possible answer is linked to a body posture or position, e.g. "Sit on the floor to answer A LITTLE, sit on your chair to answer MORE OR LESS, or raise your hands in the air to answer VERY MUCH."

In these surveys, everyone can see everyone else's responses - so they need to be used with care if you want to avoid 'conformity effects', which is when students just follow the herd instead of thinking about the answers. But in a small group with a lot of trust, it might be a useful way for the teacher to find out about the views of each individual. Spatial and corporal surveys can also provide more subtle information on how strongly people feel about a question. If everyone moves into their space or puts their hand up very quickly, this might indicate stronger feelings than if they hesitate for a long time.

Often it is really useful to follow up a spatial or corporal survey with a Focus Group Discussion or private Semi-structured Interviews, because these methods can provide valuable feedback on why people answered as they did, and help you to explore different issues and understand the group dynamics better. We recommend follow-up.

Examples of scales that can be used with different types of survey

3-point scales:

YES / PARTLY / NO
YES / NO / DON'T KNOW
VERY MUCH / SOMETIMES / NOT AT ALL
A LOT / MORE OR LESS / A LITTLE
ALL THE TIME / SOME OF THE TIME / NEVER
ALWAYS / SOMETIMES / NEVER
AGREE / NO OPINION / DISAGREE

4-point scales:

YES / PARTLY / NO / DON'T KNOW
VERY MUCH / SOMETIMES / NOT AT ALL / DON'T KNOW
NEVER / SOME OF THE TIME / MOST OF THE TIME / ALL THE TIME
A LOT / MORE OR LESS / A LITTLE / NOT AT ALL
ALL THE TIME / MOST OF THE TIME / SOME OF THE TIME / NEVER
ALWAYS / OFTEN / SOMETIMES / NEVER
STRONGLY AGREE / AGREE / NO OPINION / DISAGREE

5-point scales:

VERY MUCH / SOMETIMES / NOT MUCH / NOT AT ALL / DON'T KNOW
A LOT / MORE OR LESS / A LITTLE / NOT AT ALL / DON'T KNOW
ALWAYS / OFTEN / SOMETIMES / RARELY / NEVER
NEVER / RARELY / SOMETIMES / OFTEN / ALWAYS
SELDOM / LESS THAN HALF / ABOUT HALF / MORE THAN HALF / ALWAYS
STRONGLY AGREE / AGREE / NO OPINION / DISAGREE / STRONGLY DISAGREE

There are many other kinds of scales. You might like to ask people to rate something on a numerical scale of 0 to 5, or 0 to 10. You could even draw (or print) a line, with answers at opposite ends (e.g. “STRONGLY AGREE” at one end and “STRONGLY DISAGREE” at the other), and ask them to draw an arrow at the point on the line that best represents their response.

8.9 Theatrical Comprehension Test

Theatre can be used in place of a written comprehension test, as a way of finding out what people have understood about a given topic. In the Mexican case study (Annex 5), for example, this method was used in evaluating a schools program - with the facilitators either role-playing multiple choice answers and letting the school children choose the one they felt was accurate, or role-playing a process (e.g. tree planting) with errors, and asking children to spot and explain all the errors. Groups of students can also roll-play and invite interventions from the others.



8.10 Word Elicitation

Word elicitation is a way of encouraging people to talk openly about their feelings, emotions and ideas. You could just ask them to write down a few words about how they feel (or felt) in a particular situation, but it can be made more fun and interesting if they first use visual media (e.g. painting, collage, drawings, graffiti or murals) or performance arts (e.g. dance or drama) to express the feelings, and then talk about what they did and why. At Echeri Consultores (Annex 5), for example, word elicitation

was used in the context of a hand-painting circle to express feelings about a reforestation project.

9. Linking Indicators and Values

Some teachers have already made up their minds about the values that are important: they want to measure Respect, Justice, Integrity, and Trustworthiness, for example.

It is normally possible to use the toolkit by starting with specific values, but you will need an extra discussion step to link your values to the indicators. We recommend that you involve as many people as possible in this step, as values are very subjective. If you can build a consensus within your group (even if it takes a lot of compromise!) about which indicators are relevant to each of your values, you can then measure each of the indicators in turn, and draw conclusions about values by putting them all together. The indicators can help you to define and label your own values as understood in your group.

The words and phrases that we use in everyday language to represent values (which we will call *value-labels*) are symbols for abstract concepts that exist in people's minds. When we hear somebody talk about “respect”, we can easily assume that we understand what they mean - but do we really?

The challenge of working with value-labels is that people understand them differently,

depending on their own cultural background, education, life experiences and current contexts. Abstract value-labels like *respect* or *justice* may mean very different things to a school principal, a parent, a religious leader, and a Year 10 student who belongs to an urban gang. In order to assess a value in a school context, a **shared understanding needs to be created** – linking the value-label to specific, measurable indicators, and then to assessment tools.

The ‘Best Case Scenario’ approach (as described in **8.1 Guided Visualization** above) is designed to stimulate this process by encouraging people (administrators, staff, and/or students) to reflect on what values might look like in their school when they are ‘lived out’ in the best way possible. The approach may be most effective when it is used first for deep individual reflection, and then for collective reflection within a group, about what a specific value (e.g. ‘justice’ or ‘truthfulness’) might look like in practice.

In order for shared understanding to be created, the context needs to be clearly pre-defined. You might, for example, ask participants to think about how the value could be lived out in a particular sustainability activity; within a specific class or year group; across the school as a whole; or in a partnership between the school and a community group.

Step 1: individual reflection

In stimulating individual reflection about what values mean to people, it may be helpful to consider the role of intuition and emotion, rather than relying only on logical analysis. You might like to try using one or more of the following strategies to assist staff and students to connect to the school’s espoused ‘value-labels’ at an intuitive / emotional level:

- **The power of place:** taking people out of the everyday classroom or staff room setting and into a place that feels more conducive to deep reflection. This might be a tranquil outdoor setting, or a room that has been enhanced to provide a comfortable and uplifting atmosphere (e.g. through the use of flowers and/or living plants, soft furnishings, music, fragrance, lighting, and/or carefully chosen visual images).
- **Visualization:** allowing people to bring the Best Case Scenario to life in their minds, by closing their eyes and imagining that they are already in a future situation where the values are fully enacted (e.g. when ‘respect’ or ‘justice’ has become a lived reality). They can picture themselves **observing** what students and/or staff members are doing, **listening** to what is being said about the situation, and looking out for other evidence to show that the values are present.
- **Using creative arts:** focusing on self-expression rather than artistic ability, i.e. encouraging people to mind-map, doodle, paint or write freely about what the ‘best case scenario’ might look like, without judging or censoring any ideas. It might be helpful to reassure them that they will not be asked to share the artistic outputs themselves, but only the insights gained in the process of creating them.

After the individual reflection stage, the ‘Best Case Scenario’ form provided in ANNEX 4 can be used to record each participant’s insights.

Step 2: group reflection

The completed 'Best Case Scenario' forms can serve as a starting point for group reflection. **Attitude** and **atmosphere** are crucial to a successful outcome at this stage: if the discussion is characterised by a clash of personalities, nothing will be achieved. For this reason, we recommend physically 'separating' each written contribution from its authors, aggregating them in one place, and try to look at them as interconnected parts of a bigger picture.

To facilitate this, you may want to cut the completed forms into pieces, collect all the sections relating to a specific value (e.g. Respect) together, use sticky tack or tape to stick them on a large sheet of flip chart paper, and then draw lines between similar ideas.

An experienced facilitator, Ismael Velasco, explains that this type of group reflection process works most effectively when it is not based on *negotiating consensus* but on *allowing consensus to emerge*. It is a process of seeking words to articulate the unspoken agreement that is already expressed implicitly in collective action: "You are not voting on the truth, you are listening out for it... It is not about seeking a synthesis of diverse opinions or propositions, whether by vote, expertise or authority. It is about discovering the order inherent in the group." In the most successful cases, Velasco notes, the members of the group are often very comfortable with silence – treating it not as a warning sign that people are not participating enough, but as a space in which the 'inner voice' can be heard.

Step 3: Identifying Relevant Indicators

Once some kind of consensus has been reached about what the values might look like in practice, we recommend that you compare these ideas to the reference list of indicators in ANNEX 1 to identify any existing indicators that might meet your needs.

The indicators in the list have been linked with many different values, although the list is not intended to be universal. It is inevitably a work in progress. You can use it as a 'template' for designing new indicators that meet your specific needs, by modifying some of the key words.

Some activities to use these indicators in school contexts are described in the student toolkit *Discovering What Matters* and the toolkit for schools *Growing a Shared Vision*. Some other possibilities for the use of the indicators and assessment methods are:

- (a) Surveys designed by students or teachers, using questionnaires or creative methods
- (b) A co-enquiry group of teachers, support staff and students who meet in a lunch break or after school, e.g. discussing one question per week in depth
- (c) Teacher-designed activities within relevant subject lessons, e.g. Personal and Social Education, Religious Studies, Geography or Sociology
- (d) Art clubs or classes that respond to the questions, e.g. through painting, sculpture, graffiti art, photography, participatory video, drama, dance, music, or digital arts
- (e) Observation of teaching and learning by 'critical friends' of the school (e.g. members of the Board of Governors or the Parent-Teacher Association)

An example of the selection and use of values-based learning and indicators in a real school situation in rural Mexico is given in Annex 5.

ANNEX 1

Checklist of Indicators

INDICATORS FOR STUDENTS

For a shorter list of indicators developed with students, see the student toolkit *Discovering What Matters*.

General Indicators	Score
We respect, appreciate, and find ways to understand the differences between people	
We have self-respect	
We acknowledge and incorporate different points of view (e.g. in our thinking, writing, research, etc)	
We resolve conflicts through dialogue	
We listen to other people and try to understand what they really mean	
We walk our talk	
We take responsibility for our learning and use our own initiative	
We think critically about the ideas and information that are given to us	
We find the courage to be ourselves	
We are able to act as 'critical friends', giving honest and helpful feedback to each other	

Specific Indicators A: Knowledge and Understanding	Score
We apply our subject knowledge and skills to understanding problems in our local communities (school/family/neighbourhood)	
We understand how we relate to other-than-human creatures, and with the natural environment of our local area	
We have an insight into possible consequences of what we say and do	
We understand how to be in relationship to, and care for, particular species of plants and animals	
We think about what we buy and what we throw away, remembering that future generations will depend on the same natural resources as we do now	

Specific Indicators B: Self-Knowledge	Score
We learn to be comfortable with who we are	
We develop our own personal style by getting to know our interests, attitudes and sensitivities	
We recognize ourselves as co-creators of our social world	
We use mindfulness as a way of coping with problems	
We discover meaning and purpose for ourselves	
We see new meanings that change or deepen our understanding of what we're doing now, what we hope to do, and why	

Specific Indicators C: A Culture of Change	Score
We feel that we have the power to create change and solve problems in our local communities	
We ask 'big questions' and look for answers in the wider community	
We use mistakes as starting points for learning and growth	
We have the courage to take a step beyond our 'comfort zone'	

Specific Indicators D: Emotional Connection	Score
We find or create safe spaces to express our emotions (e.g. nature, art, music, friendship groups)	
We feel connected to other people and the world around us	
We show empathy and care towards humans and other-than-human creatures	
We celebrate, and show gratitude for, the generosity of nature	
We have a deep-rooted sense of belonging in nature	
We find a space of peace and healing in nature	
We are absorbed in the wild world with joyful mindfulness, offering our attention fully and reverently	
We experience nature as a source of personal fulfilment	

Specific Indicators E: Skills	Score
We feel we are acquiring practical skills for real life, not just theoretical knowledge	
We can proactively care for endangered species and ecosystems, abandoned pets and damaged habitats	
We help people to solve conflicts, by listening to both sides and trying to find acceptable solutions	
We remember to use non-violent communication in tense situations (e.g. using 'I feel' statements rather than blaming others)	
We make discoveries through feeling, imagination and sensing, not only through thinking	
We learn decision-making that takes into account the social, economic and environmental needs of future generations	
We resist the pressure (e.g. from advertisers) to buy things we don't really need	
We learn curiosity, conjecture, prediction and exploration	
We are able to synthesize information, not only to analyze it	
We connect knowledge from different subjects, as a way of thinking about solutions to difficult problems	
We develop the skill of recognizing systems and patterns	

Specific Indicators F: Cultural Competence	Score
We enjoy and employ our deep imagination (dreams, intuition and visions)	
We immerse ourselves deeply in the arts, using art to reflect impulses and feelings that arise within us	

INDICATORS FOR SCHOOLS

For more details on using these indicators, see the toolkit *Growing a Shared Vision*.

Policies	Score
The school makes every effort to understand and plan for students' diverse needs, and to provide a suitable education for each individual student	
The school acts in a manner that is impartial and non-discriminatory (not discriminating on any basis, including nationality, ethnic origin, colour, gender, sexual orientation, creed or religion)	
The school does not tolerate back-biting or bullying	
The school implements a policy of: purchasing environmentally sustainable products, e.g. recycled paper, even if cheaper alternatives exist; procuring some or all of its energy from renewable sources; reducing carbon emissions; sustainable waste management, e.g. recycling or reducing waste; ethical investment	
The school offers appropriate, multi-tiered support and guidance to students with problems	
The school is integrated with the local community	
The school makes every effort to understand and plan for students' diverse needs, and to provide a suitable education for each individual student	

Teaching and Learning Strategies	Score
Teachers develop lessons that are based on the memorable rather than memorization	
Teachers open [(a) each other's, (b) students'] hearts and minds to new ideas	
A wide variety of teaching and learning styles are used	
Teachers find creative ways to increase engagement with students	
Knowledge is increased through hands-on activities	
Teachers discuss with students what they think education is all about	
Teachers give students time to interact and process their learning	

Cross-Cutting Theme 1: Compassion, Caring, Respect, Student-Centredness	Score
Teachers listen with sensitivity and empathy to students	
[(a) Teachers, (b) students and (c) parents] feel that the school has a caring ethos	
The school has an embedded culture of respect for students' abilities	
Teachers see every student as a unique spirit to be cherished	

Cross-Cutting Theme 2: Engagement, Initiative, Responsibility	Score
Students [(a) feel that they are encouraged, (b) are taking the opportunity] to develop their own visions and goals for projects, and/or for the whole school	
Students [(a) feel that they are encouraged, (b) are taking the opportunity] to identify problems and develop solutions, on their own or as groups	
Teachers take conscious action [(a) to give every student an equal opportunity, (b) to encourage students] to express their opinions	

Cross-Cutting Theme 3: Learning Environment, Positivity, Happiness	Score
Staff morale and commitment levels are high	
[(a) Teachers, (b) students, and (c) parents] generally feel upbeat, positive and happy about the school	
The school is a vibrant community where teachers and students are stimulated with new ideas, thoughts, directions and possibilities	

Cross-Cutting Theme 4: Reflection, Criticality, Openness, Creativity, Risk-Taking	Score
Teachers and students help each other to reach out and take risks in their teaching and learning	
Teachers build [(a) their own, (b) each other's, (c) students'] capacity for deep reflection out of moments where things go wrong	
Teachers see themselves as 'learners' rather than 'knowers'	
Students, teachers and parents see themselves as part of a learning community with shared reference points	
Teachers and students challenge each other to rethink what they do	
Teachers are open to learning from students	

Cross-Cutting Theme 5: Transformation	Score
[(a) Teachers, (b) students, (c) parents] feel the school provides a space in which students can flourish	
[(a) Teachers, (b) students] feel that they are provided with opportunities for personal growth	

ANNEX 2

Learning about Measurement Methods: a hypothetical example

To think about how you can explore the different types of measurement methods in your own educational activity, we have created a hypothetical example of the initial dialogue between a values-based indicators adviser, the teacher of a class activity on responsible lifestyles, a volunteer helping with the activity, and participating students.

Deciding how to collect evidence about people's feelings

- Teacher** If we want to know how the students feel, can't we just ask them?
- Adviser** Well, yes, but there are different ways of asking. If you had 150 students in your classes, you wouldn't want to sit down and do a half-hour **interview** with every single one of them. You'd be spending a week and a half doing nothing but interviews!
- Teacher** Well, we don't have 150... there are 65 altogether, across all three classes. Bad enough, though, if we had to interview them all individually.
- Adviser** So you might like to start with some kind of **survey** first, that gives you an idea of the 'big picture'. It shows you how all 65 of them feel, but in a very rough way. Then after that, you can focus on just a few of the students and try to get more detailed information.
- Volunteer** A survey, so you mean we have to sit them all down and make them fill in a **questionnaire**? That will be a challenge - we've got lots of students with special needs. One is partially sighted and about six of them have dyslexia, and then there are the two who can't sit still, they'll probably run around and disrupt the others...
- Adviser** OK, so a questionnaire might not be the best approach, but there are other surveys you can use instead, like **spatial and corporal surveys**. If we knew a little bit more about the types of project activities that the students really like, we could come up with some ideas on how to create a survey that works well for you. Let's get some of the students in, and we can hear it from them directly!

The teacher goes off to look for some of her students, and while she's gone, the Adviser suggests that the volunteer should be the one to introduce values-based indicators to them. They have a quick practice, before the teacher arrives back with five of the older students - Sunita, Tim, Maria, Alex and Adeway. The volunteer welcomes the students, introduces the Adviser, explains a little about the indicators, and invites the students to talk about what they enjoy doing within their sustainability activity.

- Maria** I like art best, they let us do a mural and we all had to paint a bit of it, but we could do any style we liked, so I did mine like graffiti.
- Tim** Yeah, that was great, but the drama classes are fun too, because we get to act out stuff that might actually happen in real life, like a climate change disaster and a pollution accident and so on. Then when the scenarios start to get really bad, we can think up ways to change the story and start over again.
- Alex** And when we did that play where we could only speak in rap, if we got asked a question we had to make up a rap song about it, I really enjoyed that.
- Sunita** That was hard to do, though.

Adewayo But it was great when we finally did it, and then we got to perform it in front of everyone. Music is the best thing ever!

Teacher: What about you, Sunita? What do you enjoy doing at school?

Sunita Oh...well, I like games best.

Adviser Great, so we've got a lot of different possibilities already. Based on these different things you like, we can come up with some creative ways of reflecting on how far you've met the learning outcomes!



Measuring the indicators

Two weeks later. 59 of the students are gathered together in the hall. Adewayo and Tim introduce values-based indicators, and Sunita gets started with the first exercise. The volunteer is recording it all on video...

Sunita OK, so what we're going to do is this, listen. It's called a **corporal survey**, you use body language to answer the questions. You have to shut your eyes first and I'm going to read out a question. Think about it for a minute until you're ready. Then if you want to answer 'Yes, totally', you have to stand up and put your thumbs up, right up in the air, like this. If you want to answer 'Sort of', you have to sit cross-legged with your arms folded. And if you want to answer 'No, not at all', you have to lie down on the floor. But you mustn't open your eyes until I say so, because nobody's allowed to see what anybody else is doing. We want you to answer for yourself, not copy your best friend, OK?

All right, let's start. Everyone shut your eyes. Now, think about the way you feel when you make mistakes at school. Do you see those mistakes as opportunities to learn and improve? Don't forget, you've got to stand up and put your thumbs up if you want to answer 'Yes, totally', sit with your arms folded to answer 'Yes, sort of', and lie on the floor to answer 'Not at all'.

45 students stand with their thumbs up, 9 sit with their arms folded, and 5 lie down. The coordinator writes down the names of all the students sitting down or lying down.

Sunita OK, don't open your eyes yet! Next question. When you do make mistakes at school, do you feel that the teachers help you to learn from them?

This time, there are 35 youth standing with thumbs up, 22 sitting with arms folded, and 2 lying on the floor. The coordinator writes all this down and the volunteer keeps the video running.

Sunita That's great, thanks everyone. In tomorrow's English class we're going to be doing some creative writing about what we've learnt from our mistakes, if we learnt anything at all! But for now you can all stand up and open your eyes, and Tim and Alex will tell you what we're doing next.

- Tim** This part is all about change. There are two questions. The first one is “Are there any positive changes you would like to bring about in this school or your local community?” and the second one is “Do you have a sense of power that you can actually effect positive changes?” That means, like, do you think that you’ve got the power to change something, make something better? So we’re going to act that out, it’s called a **role-play focus group**
- Alex** Here’s our idea, right? We get into six groups, that’s about ten in each group, and then one person in each group talks about whether there are any changes they’d like to make and whether they feel they’ve got a sense of power to effect change and gives an example. They become the director of the film and they get their group to act out that scene, and when you’re ready we’ll come and video it. And after the role-plays we’ll have a snack break, then talk in the groups about whether you feel the same way as the director, or different, and *why* you feel that way.
- Tim** Your movie could be about something really positive, something you want to do and you think you’ve actually got the power to do it, and you direct the group to show it happening. But it doesn’t have to be. It might be about why you feel it’s all hopeless and you can’t change anything, or maybe you don’t even want to. The point is, it’s got to be real, your real feelings. So if you don’t want to show your real feelings, don’t be the director.
- Adewayo** Maybe people could write stuff down if they’re shy about talking in front of the whole group, you know, write down how they feel.
- Alex** That’s a good idea. I forgot to say, you can rap in the films as well if you want to, but you don’t have to do that if you find it hard.
- Maria** Can I tell them my idea now?
- Alex** OK, but we aren’t doing that until next week
- Maria** I know that! Well, I really wanted to do another mural, but we wouldn’t be allowed. So instead, the teachers are going to get us a great big roll of paper, a really huge one, and then everyone can draw something that shows how they feel about their power to change things. Then we can write words all round the picture to describe our feelings, or if you don’t want to write them, you can record them on video, but the key thing is to get a list of words about your feelings. It’s called **word elicitation**...



Word elicitation with Juatarhu youth in Mexico



Corporal survey with Red Cross youth in Sierra Leone

Reflecting on the first phase of measurement

One week later, the adviser has come to meet with the teacher and volunteer:

Adviser How did it all go?

Teacher It was great! The youth loved doing the role-play focus groups, and I think we all learned a lot from the follow-up discussions. They had some really creative ideas about the changes they can make, but beyond that, we got some of them talking about *why* they're feeling a sense of power to effect change, or why they aren't. So it was good feedback for us - it helped us understand what we're doing right, but also how we can improve.

Volunteer 1 And the art exercise worked well too, it helped them find more words to express their feelings. The atmosphere wouldn't have been the same if we'd just sat them down and asked questions.

Adviser How was the corporal survey?

Volunteer 2 Not bad, except I saw a few of them opening their eyes and peeking to see what their friends were doing, when they thought I wasn't looking. Maybe next time we should blindfold them all?

Adviser Well, if you're only talking about three or four students out of 60, it doesn't matter that much. The overall results are still more or less reliable. But if you're really worried about that, you could do a **secret ballot survey** next time. You give them three little cards with different answers written on them, or you can use different coloured cards if literacy is a problem. Then they go in one at a time to put their chosen answer in a closed box, and the other two in the recycling bin.

Volunteer I thought the follow-up interviews were really interesting

Adviser You did **individual interviews** as well, in the end?

Volunteer Yes, but only with six of the students, the ones who said they were interested in answering some more questions. We did those interviews where you just make a list of general themes to discuss, rather than a fixed list of questions - what was it you called them?

Adviser **Semi-structured interviews**. What were your general themes?

Volunteer The first one was about how they understood the questions that we asked. One or two of them just didn't know what 'opportunities' meant. When we explained that it was just another word for 'chances', they laughed and said that if they'd known that, they'd have put their thumbs up!

Adviser Yes, I think next time you'll need to pay a bit more attention to making sure everyone understands the questions. Sunita does speak quite fast, and I know English isn't everyone's first language. Perhaps you need to explain things in simpler words.

Volunteer Then the other themes were the reasons why they feel the way they do, and how we can work together to make things better.

Teacher One of them was Josef, well, you know he has a speech problem, he stammers. Apparently he said he felt that some of us don't take time to explain where he's going wrong, and help him to learn from his mistakes - we get frustrated and give up too easily - and that we need to be a bit more patient with him. You know, I never realised that before.

Volunteer Michelle was the one who made me smile. She started out with all her usual lines about "nobody ever respects me and it's just cos I'm black", and then when we tried to get her to give some examples, she couldn't think of any. Then she actually started thinking of times when the teachers had listened to her and helped her to learn from mistakes that she'd made, and by the time we finished the interview, she had a huge grin on her face!

- Teacher** Oh, is that what happened? She never told me that, but her attitude has been so much better this week!
- Adviser** Did you get a sense that any of the youth were afraid to talk about their real feelings in the interviews?
- Volunteer** No, I think they were really comfortable because it was only the two of us, me and one of the Year 11 form teachers. She doesn't take that class but they're always seeing her around. It's not like having a scary interview with strangers.
- Teacher** But what if they had something *really* negative to say about you - or about us, as their teachers? Could they have said it to your faces?
- Volunteer 1** Some of them would, for sure! But others might have actually preferred to be able to give comments anonymously.
- Teacher** Maybe next time, we should offer them a confidential interview with someone from outside, who doesn't know anything about our school. That way, if they have an issue with the volunteers or the staff, or even with the Principal, they can tell it straight.
- Adviser** Yes, confidential interviews can be very useful when you're talking about sensitive topics! And of course, anonymous questionnaires are another tool that you can use, if you're working with students who can express themselves well in writing.

Discussing how to collect evidence about what people do

- Adviser** OK, let's move on. To measure some indicators effectively, you need to do more than just collecting evidence about people's feelings. Let's take this one: "All the youth participate actively in discussions about issues that affect their lifestyles". You could ask the students whether they *feel* they participate actively, but that doesn't tell you anything about whether they really *do*, or not. How could you find out?
- Volunteer** Well, we see them every week, so we get quite a good idea of who participates a lot, and which ones are more passive.
- Adviser** That's true, so someone could interview you about that, because you know a lot already. When you interview a person with a lot of knowledge about the subject that interests you, it's called a **key informant interview**. Can you think of any other ways to do it?
- Teacher** How about a CCTV-type approach, you know, video them while they're discussing some issues, but not with the camera right in their faces, and then watch the film back to see who it is that's actually participating in the discussions?
- Adviser** Yes, that's a very good strategy, and it usually works well as long as the groups aren't too big. You can design special forms to help the people who are watching the film, so they know what they're looking out for. We call that **structured observation**.
- Teacher** Can you show us an example?
- Adviser** Well, I could give you one that was used in a different school, but it would be much better if we all designed it together. What exactly do you want to see the students doing?
- Teacher** Speaking up, I guess, not just sitting there passively. But then again, you don't want one student to dominate the conversation either, there has to be some kind of balance.
- Adviser** OK, that's a good start. Silent and passive, versus speaking up, versus dominating the conversation. If someone was dominating the conversation, what exactly would they be doing?
- Teacher** Well, they wouldn't give anyone else a chance to speak, they'd keep interrupting them...
- Volunteer** And they'd want to be the one talking all the time, you know, there are some of the students, I don't want to name names, but they just *love* the sound of their own voices.
- Adviser** That's great, so now we have two more specific things to look out for. Interrupting others, and talking too much. What would you think of as too much?
- Volunteer** Maybe talking for more than half the time
- Teacher** I don't think anybody would talk for more than half the time! But maybe we could look at how often they speak - something like 'more than 5 times in an hour-long discussion'...
- Adviser** Good idea. Why don't you try it out, and see if it works? Also, are there any students who try and encourage others to speak, you know, prompt them if they're sitting there in total silence?
- Teacher** Not the students, well, not normally, anyway, but *we* do. In a real-life situation, we wouldn't leave them completely alone in their discussions, we'd be there with them, so of course we try and encourage the quieter ones.

Adviser Great, well, we can do it the same way for whatever discussion process we decide to observe - there's nothing wrong with that. So we've got lots of different columns for our form now. It should be simple to watch the video and tick these boxes...

The Adviser sketches this table on a piece of paper:

Name	Passive (didn't speak at all)	Spoke only when prompted by teacher	Spoke without prompting	Spoke more than 5 times in hour-long discussion	Interrupted others

Teacher Great, I'm looking forward to giving this a try!

Adviser All right, we've covered most of the indicators now. There's just one left. Does anyone have an idea how to measure the fourth one?

Teacher "*Students explore issues that are slightly uncomfortable for them.*" Well, I guess we could bring someone in to do **interviews** with some of the students and ask them to give examples of when they did that...

Volunteer Couldn't we start with a **corporal survey** again, so that first we ask all the students what they think, and then just interview a chosen few to get specific examples? Are we still allowed to use those methods when we're trying to find out what people do?

Adviser Of course – and you could also ask the teachers, through a survey or through interviews. But if you really need to be able to prove it, you might want to back that up with some more solid evidence as well, like having an expert evaluator come in and do **semi-structured observation** of the class doing the activity. It's like the semi-structured interview, in that they have a general list of things that they're looking out for, but they don't use a specific form.

Teacher I don't think we need that level of proof, at this stage!

Adviser Then why not try a survey? There's another type that you could use, if you want a bit of variety – it's called a **spatial survey**. They answer by moving to different places. You could ask them to take two steps to the left if their answer is 'No', stand still to answer 'Don't know', and take two steps to the right if their answer is 'Yes'. Well, that's one way of doing it, but there are plenty more. I'm sure the students could think of creative ideas!

Teacher I really enjoyed the focus groups, too. But could we do it without role-play this time? I'm not sure how the role-play would work for this indicator.

Adviser Yes, you could have a straightforward **focus group discussion**, without any role-play.

Volunteer Oh, I have another idea! We have a folder on the office computer where we keep all our notes on the sustainability activity, feedback on how things are going, case reports on problems with individual students and how we solved them, that sort of thing. There must be stories in there about students who have felt a bit uncomfortable with a particular issue, but then in the end they've pushed ahead and explored it anyway.

Adviser Excellent idea! You've just identified another different measurement method – it's what we call **document analysis**. When you've got the values-based indicators firmly in your mind, you can find evidence in all kinds of places. Activity reports can be a great source of evidence, and for some indicators, you can find clues in your curriculum, schemes of work, term reports, student essays and class notes. For others, **indirect measures** – like student attendance records or activity outputs – can be helpful too.

Reflecting on the results

Three months later. Adewayo and Maria have been invited to give a talk at a national student conference, organised by a large environmental organization, about their experiences with values-based indicators. Here they describe what they did with the data that they collected:

Adewayo So after we finished doing all the exercises, the staff talked to us a bit about values – how values are the things that matter to us, the things that we think are good and important – and they gave us some examples. Then they wrote the indicators up on flip chart paper, all five of the indicators that we measured, and asked us to think about whether there were any words that came into our minds when we looked at them... any common themes.

Maria And that involved everyone - the teacher and volunteer too.

Adewayo We had to think about whether any of the themes that we had found were values - we felt that all of them were – and then we had a discussion about which of the five indicators related to which values. Finally, at the end, we discussed what we'd learned about the values. Maria, do you have the form?

Maria opens a file on a laptop linked to a projector, and presents this table:

Value	Relevant Indicators	Results and Conclusions (what the results told us)
Proactive Learning	All the youth participate actively in discussions about issues that affect their lifestyles	We're doing quite well here, but we still have some work to do. Most youth do participate, but about a sixth (10 out of 59) are very passive.
	Students see mistakes as opportunities to learn and improve	More than three quarters of the youth said 'yes, totally'. We found out later that several of the others hadn't understood the question properly.
	Students feel that their teachers help them to learn from their mistakes	There were only two who felt strongly that staff didn't listen to them enough and that they had trouble getting their opinions across. One said it was due to his speech problems and the other felt (at first!) that she was being discriminated against – although during the focus group she changed her mind and came up with lots of examples!
	Students explore issues that are slightly uncomfortable for them	This is definitely true! 62 students did the spatial survey and of those, 58 said 'yes', they had explored issues that they initially found slightly uncomfortable. They gave some great examples, like the environmental impacts of buying a new mobile phone every year. Only 4 said they didn't know, and nobody said 'no'. We also found evidence in the computer files to support these results.

- Adewayo We learned a lot from our first attempts at measurement. The second time around, when we did the spatial survey, we talked about the questions first with all the youth to make sure everybody understood them. We also talked about how important it is to keep your eyes shut and not look at what other students are doing. I don't think anyone opened their eyes that time!
- Maria So those were our findings for the value that we decided, in the end, to call 'Proactive Learning'. And here are our findings for what we're calling 'Empowerment'. We added an extra indicator, the one about the teachers, because we thought it would be interesting to find out what they thought too. We asked the Principal and she let us make up a questionnaire, and then gave it out in the staff room. Only five of them actually answered it but they wrote down some really interesting examples.

Value	Relevant Indicators	Results and Conclusions (what we learned)
Empowerment	Students want to bring about change in the school or the local community Students have a sense of power that they can effect change	This was amazing! The students made some great movies about the types of positive changes that they feel they can make (and, in some cases, have already made) in the school and in the wider community. In focus groups, they also explained what it was about the project that had empowered them. Many of them talked about having a safe space to try things out, feeling comfortable with the teacher and volunteer, and being able to share ideas with one another before taking action.
	Teachers have a sense of power that they can effect change in the school and in the local community	All five of them said a big YES! Our form teacher said that working with the values-based indicators had actually increased her feeling of empowerment, because she could see some real evidence of the changes in our class that had resulted from the project. Two of them also said that hearing about the sustainability project in assembly had given them new ideas for things they can do to clean up the village and stop the pollution of the stream.

A note about choosing and using indicators in your own school...

Please remember, this example of possible ways to measure different indicators is just that – an *example*.

You do not have to use the approaches described above. As the example showed, one of the things that makes the values-based indicators so special is the fact that they can be used in different ways, according to the specific situation.

We believe that if you

...**involve lots of people** (*broad* participation), give them at least some...

...**control over decision-making** (*deep* participation) and encourage them to work through the exercises in a ...

...**sincere and thoughtful way** (*quality* participation), the outcome will be a list of Indicators that are deeply relevant and a set of creative Measurement Methods that really work in your specific context.

But in this toolkit, there are no 'rules' as such. You could still choose Indicators and Measurement Methods by yourself, if that is the way you like to work.

ANNEX 3: The ESDinds Project

These values-based indicators were developed in a rigorous manner. The ESDinds project looked at many ways of defining and describing values, and worked with a number of organizations to define their own values. It then searched for indicators that might measure those values. After 15 months it had derived a master list of 166 indicators for pilot testing, from which each project could choose indicators to edit, add to, modify and update. Assessment methods were then developed to collect information on the chosen indicators, supported by assessment tools. An overview of the process is given below, but for those who would like more detail, the process has been described in academic journals (see bibliography) and on the ESDinds project website www.ESDinds.eu.

The work was undertaken in a European Commission funded research project under the Framework 7, Environment theme. The EU has recently started providing novel mechanisms in research grant processes which allow Civil Society to be involved in research. In this case, the mechanism was called Benefit for Specific Groups: Civil Society Organisations. The idea was that researchers would work *for the benefit of the CSOs* – not the other way around.

A consortium led by the University of Brighton was formed for a project called “The Development of Indicators and Assessment Tools for CSO Projects Promoting Values-based Education for Sustainable Development”, or ESDinds for short, for the purpose of developing values-based indicators (<http://www.esdinds.eu>). There were two academic partners with teams of researchers: University of Brighton (UK), and the Charles University Environment Center (Prague). Four diverse civil society organizations were also partners: Alliance of Religions and Conservation (ARC, UK), Earth Charter Initiative (Sweden/Costa Rica), European Bahá’í Business Forum (EBBF), and People’s Theatre (Germany). In addition, the International Federation of Red Cross/Red Crescent Societies (IFRC) made some of its activities available for case studies.

What is unique about the ESDinds project is that the CSOs were given complete control over the research decisions.

The researchers from the two universities did most of the work, but had to constantly work to learn and communicate with CSOs in their own language, to prepare them to be able to make those research decisions. This made the partnership very deep, and very special. This is different to most other EU research projects, where the CSOs become the subjects of the research, not dominant partners.

An important consequence was that the researchers started the development of their values-based indicators in the field, not from theory alone. They visited several CSO groups and businesses on the ground: listened, observed and questioned. It was decided to collect information from 4-6 CSOs about what values and related concepts were important to them, through interviews, document analyses, surveys and key informants. This information was coded by the researchers, and analyzed using a software package called AtlasTi for classification into values types, indicator types, levels they applied at, measurement methods already used, etc.

From this analysis, 125 values were identified. As the number of 125 was far too many to use, they were clustered and grouped, and discussions took place with the ESDinds four own CSOs to determine which ‘clusters’ were the most important to them. Five were chosen: Justice, Integrity, Unity in Diversity, Empowerment and Trust. The researchers then carried out literature reviews of these five Values; returned to the collected data and drew out related

concepts and indicators. They then presented 'themes' of 364 indicators to the ESDinds CSOs for short listing. This was done on the basis of prioritized importance to these four CSOs. The CSOs were also asked to consider if there were gaps in the values/indicators of things that they thought were too important to miss out, and at this stage a sixth value was added: Care & Respect for the Community of Life. After appropriate development of indicators for this new value, the final list of 6 Values with 177 Indicators was taken forward into field studies.

In the field studies with CSOs and businesses that followed, the indicators were refined considerably. It was unexpectedly found that the Indicators were a much more useful starting point than the Values, so this aspect was developed. It was also found that the quality of interactions that took place between people in the CSO on the ground was a very important contributor to the benefit received. It was also unexpectedly found that the List of Indicators was almost universally useful for any type of values-based entity, and that very few were felt to be 'missing'.

At the end of the two-year ESDinds project, a conference was held to present its results to many interested organizations. Reports are available at <http://www.brighton.ac.uk/sdecu/research/esdinds/conference/index.html> and <http://iefworld.org/conf14.html>.

The project results and case studies are fully documented on the project web site: <http://www.esdinds.eu>. An additional web site called WE VALUE was created to help other organizations adapt the indicators for their own purposes (<http://www.wevalue.org>). The partner organizations are continuing to develop and use the indicators for their own activities.

Other sectors such as faith groups, universities, etc. are encouraged to explore how values-based indicators can be used in their own contexts. The Partnership for Education and Research about Responsible Living (PERL) saw the potential in this approach to support the educational activities it is encouraging in schools, and undertook to prepare this toolkit in collaboration with the University of Brighton and other partners in the ESDinds project. While some of the indicators in this toolkit are drawn directly from the ESDinds project, others have been developed specifically for PERL using a similar research process.

ANNEX 4: 'best case scenario' form

Staff, governors and/or students can be asked to complete this form for each of your school's espoused values. Completed forms can be cut into pieces along the grey lines, if wished, to facilitate aggregation of all the responses relating to each of the values.

Our Values	What would this look like in a 'best case' scenario? What would people do? What might they say?

ANNEX 5

An example from Mexico

By Cardiel Amezcu-Luna, Founder and Director, Echeri Consultores, Mexico



Echeri Consultores is a non-profit organisation based in Michoacan, Mexico. We work with children and youth at the local level - reconnecting them to their environment, promoting values education based on the Earth Charter, and reforesting degraded areas.

School children preparing tree seedlings

“Values are intangible! But I got curious about whether it might be possible...”

OK, so when I first heard about the project, I was sceptical. I thought it was highly unlikely that we could arrive at indicators for values. Values are intangible! But I still got curious about whether it might be possible. It resonated a lot with me because our program has always been about values, but we didn't have a way of showing that to our funders. All we were able to tell them was how many trees we were planting, and how many children were in the workshops.

I felt a bit nervous because at first, I really thought some researcher was going to come in with a rating scale and judge us, saying something like, “Oh, you only have 50% love!” But then I found out that the project provides tools for us to judge, according to our own internal criteria.



We decided to use values-based indicators to evaluate two strands of our project. The first was *Juatarhu* (“Forest” in P'urepecha), a multi-cultural group of 19 youth aged between 12 and 21 who meet every week. The second was our programme of workshops for 9-13 year old children in fifteen schools within Purepecha indigenous communities. Both project strands use visual arts, dance and other participatory methods to raise awareness of environmental conservation and values, and include guided reflection on the local ecosystem,

technical workshops on tree planting, and practical reforestation activities.

When the project first began, all the indicators were organised under six different value headings, so we had to choose the values first and then the indicators within those. We

did a workshop with the Juatarhu youth, looking at different values to see which they'd be interested in knowing about. It focused on defining those concepts based on the young people's actual experience.

Very beautiful things happened during that workshop. We spent two hours discussing what the values meant and how they related to one another, and in the end we decided that we wanted to focus on two values - Collaboration in Diversity, and Care and Respect for the Community of Life - because those are at the heart of everything we do. For us, respect is the basis for all the other values: love arises from respect, and integrity from love, and so on. But diversity is also very important to us because our project encompasses different ages, different communities, some of them indigenous, some in transition from rural to urban settings.



Discussions in workshop with Juatarhu youth

The next step was choosing which indicators we were going to measure within each value cluster, and how we would do it.



Discussing measurement methods and assessment tools

With the help of a visiting researcher from the project, we translated the list of indicators into Spanish - well, it wasn't just translating. We were expressing them better, so that they fitted our project. When it came to choosing the measurement methods, we really worked closely together.

The researcher brought the initial tools - for example, he said that he thought a survey would be a good method for some of the indicators. But we wanted to do it in a participatory way, because of the nature of the group: it had to be fun and stimulating.

“We wanted to do the survey in a participatory way... it had to be fun and stimulating.”

My idea was to use a spiral. That's a symbol used ancestrally over time by indigenous communities in Mexico, and at Echeri we include it in most of our exercises. So my idea was to make a big spiral on the ground out of different coloured scarves, and have each colour mean a different answer. When we asked the survey question, the youth had to go and stand on the colour that best represented their answer to the question.

This method was really valuable because we could assess how the group as a whole was doing, and at the same time, how each individual was positioned within the group.

After noting where everybody stood, we had a focus group discussion. We asked them questions like “why do you feel this?” which went beyond the numbers and gave us

all the invisible information. But the numbers were just as important because they provided a vision of the whole, and strategies for the whole group.



Juatarhu youth showing word elicitation paintings

“They’ve always felt very united, but now they know why...”

I’ll give you an example of how values-based indicators transformed the group relationship. We had a question that we translated as “Do you respect the norms that Juatarhu has set?” The original indicator was “Group norms exist and they are followed.” For that question, everybody went into the part of the spiral that meant ‘More or less’. We asked them, “Why? You make your own rules,

and there is no pressure or imposition of these norms, why don’t you respect them?” And as a result of that process the youth made a commitment, without me putting any pressure on them. They promised to follow the norms like arriving on time and keeping the blog updated. It has worked, I was away for a month and they kept on doing everything!

Here’s another one. The indicator was ‘Women/girls feel that they are valued, and have equal access to information and decision-making’. And everybody went immediately, without thinking about it, to ‘A lot’. There was no hesitation. It was a question they’d never asked themselves, because it was always there.

But in a country, in a region full of sexism, where women do not have that access generally, the youth realised that the project has generated a space of equity. As a project team, and myself as director, we had generated this space consciously, but at that moment the youth really became aware of it.

The youth said it in public, that after this process they understand one another better and they value much more what they’re doing. They’ve always felt very united, but now they know *why* they’re united.

“Thanks to our evaluation with VALUES-BASED INDICATORS, our funder has reconceptualised our work as something of international relevance.”

Our major funder, Reforestamos Mexico, got involved with the assessments too. Their representative was the one who suggested getting the youth to do a hand painting circle, and that was turned into a word elicitation task.

Painting each other’s hands gives the youth a starting point to talk about the emotions that they felt after finishing a reforestation project.

They could name emotions, like happy, joyful, but they also said some beautiful things. A 12-year-old boy said he felt that he had left a positive footprint on the world. After doing the reforestation, he was helping to “prevent the world from falling sick”. Then a small six-year-old boy painted the entire hand green and when asked to talk about it, he just said “I feel green!”



Cardiela Amezcua-Luna

Values-based indicators have allowed me to measure the *human* results, beyond the concrete results of the action. I thought you couldn’t do that, but now I see that you can. Our earlier evaluation was all based on the action: it didn’t evaluate the individual processes of each group member, in relation to the broader vision.

“I could see the values there, just through my own intuition as a teacher, but I couldn’t see how it was possible to measure them.”

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