

**Deliverable Number 12:**

Minutes of Core Group Meeting (CGM) 3



<b>CONSORTIUM GENERAL MEETING (CGM) 3</b>
<p><b>Present:</b> Arthur Dahl (Meeting Chair);            Alliance of Religions for Conservation (ARC): John Smith;            Earth Charter Initiative (ECI): Alicia Jimenez;            People's Theater: Curtis Volk;            European Bahá'í Business Forum (EBBF): Daniel Truran; Serge Thill            Charles University (CUEC): Tomáš Hák, Martin Zahradnik, Svatava Janoušková;            University of Brighton (UoB): Marie Harder, Gemma Burford, Elona Hoover, Ismael Velasco</p>
<p><b>Apologies:</b> Julie Carter</p>
<p><b>Date:</b> 27-28 May 2010</p>
<p><b>Where:</b> Charles University Environment Centre, Prague CZ</p>
<p><b>Meeting Start:</b> 9am Wednesday 27<sup>th</sup> May</p>
<p><b>Meeting Close:</b> 6pm Thursday 28<sup>th</sup> May</p>



## **Minutes of Core Group Meeting (CGM) 3:**

### **1. Welcome and Consortium Business**

Prof. Bedřich Moldan, director of the Charles University Environment Centre, welcomed the team to Prague.

Prof. Arthur Dahl welcomed two new members of the team, Gemma Burford (University of Brighton) and Serge Thill (EBBF ESDinds project manager) who both add additional insight and knowledge to the project.

Statement on the membership of the International Federation of the Red Cross and Red Crescent Societies: Progress on being a project partner has been slow, and unlikely to happen before the project's term, although projects and involvement are welcome.

### **2. ESDinds Overview**

Prof. Marie Harder, project coordinator, stressed that this is an important meeting to re-ground the project's framework in the context of actual hands-on experience from field visits, and that doing so will inform what needs to be achieved in the last phase of the project.

The consortium went through a brief overview of the project to date, after confirming that the central question that the ESDinds project seeks to address is: 'can values be measured (usefully), when contextualised?'

First, researchers collected data to identify core values perceived by the CSO partners and then identified indicators relevant to five of the values selected as most relevant. A sixth value was added at the request of a CSO partner.

Second, field visits were carried out to test the identified and developed indicators, including their validity and usefulness. The field visits also enabled CSO projects to adapt and modify the indicators according to their local context and inform the next steps of the project.

#### ***Re-grounding the ESDinds conceptual framework:***

Point 1: The research group pointed out that we must articulate the effects of 'measuring' values separately to the effects of bringing people together to think about their values, calling these two strands 'measurement' and 'crystallisation' respectively. It was noted that identifying the different effects/impacts of these two strands were not conceptually separated in the field visits and must be incorporated into the research design from now on.

Point 2: While some of the original indicators were left virtually unchanged or just transformed into a question, many of the indicators were changed and adapted to suit the local context. This adaptation was often linked to finding an appropriate assessment tool and type of evidence that would enable an evaluation of the said indicator. This distinction is very important for the transferability of the measurement process to CSOs (see below), thus the group agreed on a working terminology of general indicators for those developed by the consortium partners and presented to CSOs, which are then developed into specific indicators at the local level.

Point 3: An important outcome of the field visits was to realise that the interactions that occur within organisations and between the CSOs and the researchers, both at a distance and in the field, have a profound impact on the applicability, usefulness and relevance of the ESDinds tools. For instance, important interactions contribute to developing useful locally specific indicators and relevant assessment tools; however these interactions are not obvious to those who have not taken part in the field visit and have not been described in the field visit reports. The consortium agreed to term processes the diverse interactions and events that take place.

Point 4: Projects must find the ESDinds tools useful and we must be able to show that this is a result of 'indicating' or 'measuring' the presence of values. The consortium discussed and agreed that we need to know exactly what information was gathered and measured, and how this was useful to the organisations.

In order to illustrate the points above, Gemma Burford talked the consortium through insights drawn from an interview with Cardiela Amezcua-Luna, director of Echeri Consultores, who hosted one of field visits.

The interview highlighted the importance of the processes that took place from the initial encounter with the ESDinds concept to the use of our tools during and after field visit. Adapting to the local context was crucial in

terms of the acceptance and incorporation of ESDinds beyond the field visit. Cardiela noted that indicators were “useful approximation of values” and that “thankfully there was still something mysterious and un-measurable”. Finally the benefits and outcomes of using the values-derived indicators were significant and important.

### 3. Discussions and Decisions on Priorities for the Next Phase

Re-grounding the ESDinds conceptual framework allowed the consortium to reflect on the priorities for the next phase and discuss which questions the project needs to answer before the end of the project. These included:

- Can values be measured? Can we really show this?
- Do we need to consider more values?
- Do we need to explore 2-way mapping\*? (Are the indicators the most universal element?)  
\*defining indicators from values and defining values from given indicators that are not attributed to specific values
- How crucial are the processes?
- Do we need to explore more assessment tools?
- Do we need to explore more cultures?
- Do we need to explore different age groups?
- Do we need to consider a non-values driven context? The work might be biased by the sample.
- How much should we draw out from the ‘crystallisation’?
- Do we need to ‘streamline’ the ESDinds system, i.e. go from defining values, to creating indicators and assessing them with one organisation in one field visit?
- How do we relate our findings to what is going on in other fields?

After discussion, the consortium agreed on the following priorities for the next phase as well as tasks that should be carried out as soon as possible:

#### a. *Priorities for the next phase:*

##### **High priorities:**

- Can values be measured? We must define what is measured as well as its use, identify and link specific indicators to values as well as to conclusions drawn and use to the organisation
- Focus on measuring and not crystallisation
- Documenting and understanding processes
- Investigating a non-values driven context (control)
- Concentrate on projects outside the youth context

##### **Lower priorities:**

- Explore different cultures and sectors, possibly Asian or Middle Eastern: when deciding on projects for the next phase.
- Diversity of size and hierarchy
- Understanding the crystallisation of values during the ESDinds processes: this will be partially covered in Serge Thill’s work as it is crucial for business context.
- Linking to other communities of practice and discourse: (i) funders (ii) project and ESD evaluation and monitoring (iii) policy (iv) business: to be considered for the conference.
- Streamlining (i.e. running through the whole process). This should only be done after the highest priorities are met

#### b. *Immediate tasks for researchers and CSO partners*

- Capture processes that took place in phase 2 (field visits)
- Researchers to document exactly what was measured and what the impact was
- Use the two tasks above to extract guidelines for streamlining
- Articulate and communicate what the project has done in the first and second phases – Dimity Podger to write what took place in phase 1 in terms of crystallising values (due mid June)
- Identify what is useful for the projects/organisations and communicate this to a wider public – CSO partners to actively participate in this process to help disseminate in the appropriate language.

## 4. Selection of work strands and field visits

### a) Decision on strands of work for the next project phase

The Consortium agreed to allocate some of the time originally committed to (four to six) field visits in the Description of Work (DOW) to other strands of work that would address the priorities highlighted above. The Consortium discussed the role that the CSO partners have to play in this next phase and agreed that five strands of work carried out by the research team would be supplemented by work carried out by the CSO partners, which will help them to build capacity and become experts in using the ESDinds tools by themselves.

Main strands of work for the research team agreed by the Consortium, equivalent to time spent on five field visits:

Time equivalent	Description
1x field visit	Work on eliciting processes
2x field visit	Additional support and information from 50-80 organisations in order to answer the key questions: <ul style="list-style-type: none"> <li>• can values be measured (usefully)?</li> <li>• two-way mapping</li> <li>• identify more values?</li> <li>• processes</li> </ul> Link with work done by ECI, EBBF, PT and ARC
1x field visit	Field visit
1x field visit	Field visit

### b) Overview of the projects identified as possible case studies - CSO selection of two projects to test research priorities and identification of own areas of work

The Consortium agreed that the criteria for selecting projects should reflect the priorities agreed for the next phase. It was suggested that the projects selected should:

- focus on groups other than youth
- be in different cultural context (to include Asia and/or the middle east if possible)
- cover a non-values driven context
- have different sizes and hierarchies (projects so far were small community groups)
- allow researchers to streamline the process
- not involve manipulation or coercion of participants or affected stakeholders
- have people in the projects available and willing to assist the researchers

Each project suggested for field testing was discussed in the context of the work that each partner CSO would engage to do in the next phase. Suggested projects were:

- People's Theater Alumni - Germany (PT)
- People's Theater, work in schools – Germany (PT)
- The Farad Group, life insurance and investment – Luxemburg and Milan (via EBBF)
- George Ronald Publisher Ltd – UK (EBBF)
- VTCT - Qualifications – UK (EBBF)
- Archibel SA – Belgium (EBBF)
- Epoch International – China (EBBF)
- AIESEC – France (EBBF)
- University of Guanajuato – Mexico (ECI)
- Fundación Valores, Madrid – Spain (ECI)
- Youth Development and Empowerment Initiative – Nigeria (ECI)
- Millennium Education for Sustainable Development Programme (MESDP) – India (via ECI)
- Clean India – India (ECI)

The Consortium made the following decisions on project selection and areas of work covered by partner CSOs:

- 1) Two projects will be used for testing priorities, including replicability for CSOs. These are:
  - One of the two possible projects in India (the other will be part of the 50 to 80) – prioritise Clean India over MESDP project – ECI
  - To be decided at the research meeting on 29<sup>th</sup> May 2010 – Consortium conferred decision power to Arthur Dahl.

**Post meeting comment: after discussion among researchers, Arthur Dahl decided on behalf of the CSO partners that the University of Guanajuato, ECI Mexico would be the second project for field visit.**
- 2) Input from CSO partners in the next phase:
  - ECI to further develop initial work that has been done in using indicators in their online course (work carried out by Alicia Jimenez) and support affiliates, and other organisations that have engaged with ESDinds through the ECI website, that are part of the 50-80 organisations.
  - EBBF (with Serge Thill) to take on the business dimension, including crystallisation and two-way mapping and link to streamlining. This would include some of the projects mentioned above, one of which could address the non-values context. UoB to support.
  - ARC to oversee any work with faith communities even if project is not found through ARC. ARC and Arthur Dahl to establish contact with the World Council of Churches. If this fails then Consortium to identify a faith project through UoB or ECI networks.
  - PT to develop their own capacity and trial indicators and assessment tools, recording 'processes' and challenges encountered. CUEC to support.
- 3) If the Federation of the Red Cross and Red Crescent Societies proposes a project, it will be included in the 50-80. If one of the field visits fails to take place, a Red Cross project could replace it.

## 5. Project Dissemination

### a) *Immediate information for the ESDinds (EU) website*

UoB team to publish field visit summaries and up-to-date project information on the website.

### b) *Starter package to engage 50-80 CSOs and recruitment process*

An evolving resource that will be developed in different 'languages' for different types of organisations that will be involved in the 50-80 CSOs (businesses, community groups, faith groups, umbrella organisations etc.). This will also be incorporated into the WeValue online platform being created by Anderton & Boyd.

#### **The Consortium agreed that the Starter package should include:**

- Story of a field visit
- What the project is about
- Understand what commitment is needed and manage expectation: the level of support is dependent on the project's capacity
- Understand the benefits
- Must convey the message that this is new and incomplete: 'join us in our experiment and feel free to make mistakes, your feedback is also extremely useful'.
- How to get involved – what are the different activities/tests. Two main entry points: values or indicators.
  - *Open a discussion about values* – guide them through the process. This is a longer route and once values have been identified, the organisation could then go on to indicators if appropriate.
  - *Present the indicators* (1) which ones do you want to use? (2) After consultation, which ones are relevant as a team/organisation? (3) Which of your values do these link to? (4) Try to measure – link to specific indicators and assessment tools. Give examples where we have some and ask to collect examples from their process. Also say which ones have worked so we have some robust easy examples. If interaction is not possible, must go through phases 1 to 3 before the process, and suggest using only a few indicators to test.

#### **Time frame for finalising material for the starter kit:**

General information: to be ready by the end of June

Values: information to be ready by the end of June  
Indicators steps 1 to 3: information to be ready by the end of June  
Indicators step 4: to be ready in early to mid July

**c) Project handbook – final version due in month 24**

It was agreed that the handbook would be written in one ‘target’ language – identified as the ECI audience – and then translated, with the help of CSO partners, to other languages (e.g. faith, business) The goal of the handbook was not decided and its scope, content, structure etc. have yet to be decided. These decisions will be informed by experiences with 50-80 CSOs and the starter package design.

**d) Anderton & Boyd – WeValue**

Tammara and Amdis from Anderton & Boyd (A&B) presented the WeValue brand strategy to the Consortium. The Consortium then had a chance to ask questions and discuss the strategy.

A&B confirmed that the hosting of the site is free for the moment and are in discussion with the UoB team about maintaining it after the ESDinds project finishes. This could be in the form of a partnership.

The Consortium members discussed appearance – the simple dual colour suits businesses very well, more pictures and colours would suit the international CSO context better. UoB team to take this into account when developing strategy with A&B.

CSO partners wanted to be sure that the branding exercise would be mutually reinforcing with their existing brand (e.g. ECI). Gemma and Alicia questioned whether ‘.org’ would be the most appropriate domain as it might confuse users. It was agreed that this would be considered but not as a priority as the domain has already been purchased.

Budget for the website will likely come out of the BASED-UK funds. Consortium agreed the investment was worthwhile and CSO members agreed to move forward with A&B.

**e) Conference**

Marie Harder briefly presented the aims of the conference as described in Description of Work: primarily for project dissemination but also to engage with different academic fields. The Consortium agreed to the following guidelines.

**Aims of the conference**

- Sharing results (both ESDinds as a whole and projects that took part in field visits or as 50-80)
- Creating a buzz around the project
- Attracting funders
- Bringing together stakeholders in a collaborative space – for instance, people involved with Values, Commission on Sustainable Development, indicators and Corporate Social Responsibility, project evaluators, large NGOs, the donor community and Universities.

**Budget**

- No conference fee, travel and accommodation will not be covered
- Possibility of using budget from CSO partner to fund travel
- To facilitate CSO participation if travel is not possible, we can project videos and use video conferencing facilities
- Ask organisations to think about sending people (e.g. Red Cross)

**Tasks for conference preparation**

- Develop a good media platform; use WeValue and update ESDinds.eu website
- Send early invitations to keynote speakers to attract other organisations and advertise
- Make conference arrangements as soon as possible – venue to be Brighton
- Have one to one discussions with funders one or two months prior to the conference
- Document and communicate the impacts the project has already had and usefulness to CSOs. Translate impacts and usefulness in order to relate to funding bodies
- Invite donors to present how this might be useful for the projects they fund, for instance in terms of the challenges of project evaluation (invite EU)

It was noted that the conference for the celebration of ECI's 10<sup>th</sup> anniversary is taking place in India, 1<sup>st</sup> to 3<sup>rd</sup> November 2010. It will be a conference on ESD and indicators. ESDinds partners to lead a workshop there and use it as an opportunity for project dissemination.

Arthur Dahl noted the possibility of organising the 14<sup>th</sup> annual conference of the International Environment Forum around the ESDinds conference in Brighton.

Provisional dates for conference: 16th to 18th of December with lunchtime finish on Saturday and arrival Wednesday evening.

#### **f) Research outputs**

Researchers to send draft report to CGM4 one month before the meeting. The final paper will be delivered two weeks before CGM4.

Marie Harder noted that it is common practice in the academic fields of Education and Community Engagement to publish books. Publication could be supported by funds from BASED-UK and ARC to be involved in 'creating stories' from experiences recorded during the ESDinds project. The book would be less than 1000 pages and the launch would take place during the conference. Marie Harder to lead.

## **6. Project Review**

### **a) Reflections on collaboration between CSOs and research institutions**

Project CSO partners were asked to share their experience of the last phase and reflect on collaboration to date between partners.

ECI gained important insight into the process while attending the field visits in Mexico, which inspired Alicia Jimenez to use the indicators with an online course delivered to 25 individuals across the globe. Collaboration with researchers remains important as the interpretation of results is still challenging for the CSO partner.

PT also learned from taking part in the research process and is hoping to take further ownership in the next phase and lead within their organisation and with their work with schools. Curtis Volk noted that collaboration with researchers would be important in terms of guiding the next steps.

EBBF are excited about the collaborative potential and have appointed a project manager for the ESDinds project in order to take this further. Serge Thill has already been collaborating closely with researchers in extracting information from the field reports and translating into the business context.

ARC presented a paper on the limitations of ESDinds within the faith context and the work ARC does. The lack of capacity from ARC's side has been a problem for more complete collaboration to take place. The lack of suitable projects might have also contributed to ARC feeling the limitations of ESDinds in the faith context. The group discussed the possibility of having an 'intern' post within ARC as well as engaging with faith groups outside of ARC's network.

The increased involvement from the CSO partners will also feed into the research in the next phase as we will learn from the challenges partner CSOs face when engaging with the measurement process of ESDinds. The next phase will be very important in terms of building capacity within partner CSOs for supporting other organisations and engaging more fully in the project's research.

Most information from field visits was fed back to projects at least in a minimal form, but researchers must tease out what conclusions were made and make sure all expectations were met. Researchers are to ask projects visited if they are happy with the feedback given and Martin Zahradnik to discuss full field report for Lush (EBBF) with Daniel Truran and send to Lush Italy.

### **b) Review of Work Progress and Achievements**

Marie Harder outlined the work progress to date, highlighting areas that need to be updated and addressed.

- 1) **EU deliverables:** All deliverables have been submitted, however, Deliverable 10 (Development of Traditional Environmental SD Impact) and Deliverable 11 (Findings from Set 1 SDIs Research) remain incomplete; an updated version should be sent to the Consortium partners and the EU by the end of June.  
Martin Zahradnik and Serge Thill to lead on gathering information on traditional environmental indicators for Red Cross and Lush projects respectively. Researchers to extract relevant information from field visits and incorporate into field reports by end of June
- 2) **Dissemination:** Marie Harder and Dimity Podger to lead on writing achievements from phase 1 for new communications materials (website, starter kit etc.)
- 3) **Significant results:** We are confident that we can show that values can be measured (usefully) when localised. All field visits were successful and showed that the indicators developed resonate strongly with diverse organisations. Collaboration remains positive; one field visit was carried out by members from both research teams and ECI took part in the field visits to their projects. CSOs are driving research decisions and becoming increasingly engaged in the research and dissemination process.

### **c) Project Management**

Marie Harder and Ismael Velasco noted that WeValue.org will be owned by UoB and not ESDinds and is working on a plan for intellectual property and ownership beyond ESDinds.

PP4SD conference successfully attended and some organisations were recruited for the 50-80 pool. Links have been made with scholar in the field of Ecopsychology at the University of Brighton and we are hoping that further connections within the University develop in the next phase.

### **d) Date for next CGM**

Dates for CGM4: Tuesday 9th and Wednesday 10<sup>th</sup> November 2010. Research meeting on Monday 8<sup>th</sup> and post meeting on the 11<sup>th</sup> (possibly also 12<sup>th</sup> for research outputs).

## **7. Summary of decisions made at CGM3:**

### **a) Agreement on project priorities and immediate tasks for next phase**

- Capture processes that took place in phase 2 (field visits)
- Researchers to document exactly what was measured in field visits and what the impact was, including usefulness and make sure projects were satisfied with feedback given
- Articulate and communicate what the project has done in the first and second phases to wider public
- Complete deliverables 10 and 11

### **b) CSOs to agree on five strands of work including two suitable projects**

1. Processes
2. } Work with 50-80 organisations
3. } and link with work done by ECI, EBBF, PT and ARC
4. MESDP or Clean-India, India (ECI)
5. Confer decision to Arthur Dahl at Research meeting.  
*Outcome:* University of Guanajuato, Mexico (ECI)

CSO partners will also carry out work and develop their own capacity with some support from research institutions.

### **c) Project dissemination**

- The Consortium agreed to work with Anderton & Boyd on the WeValue brand strategy, UoB to lead.
- Provisional dates for conference: 16th to 18th of December with lunchtime finish on Saturday and arrival Wednesday evening.
- Initial starter kit to be ready by the end of June to engage initial 50-80 organisations. Discussion on final handbook to happen at CGM4.
- Researchers to send draft report to CGM4 one month in advance and final report two weeks before.

**d) Report on Gender Issues and the Balance of Faiths (ECI and ARC)**

Statement on faith bias – no bias has been detected towards faith groups in the selection of projects in the second or third phases. It is important to try to include faith groups in the next phase. Difficulty of including faiths has not been due to bias but rather to the nature of faith groups. No overt Baha'i influence on the results of the project.

Statement on gender bias - gender was incorporated into the indicator process within the field visits and this allowed gender issues to surface in the process. Take note for the next phase field visits that female research assistants and/or interpreters might be important for extracting information. Otherwise no gender bias in research process to be reported.

**e) Dates arranged for CGM4**

**Next Meeting: 9<sup>th</sup> – 10<sup>th</sup> November 2010, University of Brighton.**