

# **Measuring the Intangibles**

## **Values-based Indicators**

### **Workshop**

**ABS/IEF Conference**  
Washington, D.C., 13 August 2009

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# Civil Society Organizations

- Need to be practical and effective
- Work to put values into practice
- Need to show measurable progress
- Must convince donors to support what they are doing

# BUT

- They are pushing "values"
- a misnomer, the hardest thing to put a value on



# The Challenge of Values-Based Indicators

- How do we measure what the CSOs are trying to do?
- Are there indicators that can measure the changes they are trying to bring to their target audience?
- Can we make value-based change more tangible?

**Opportunity to make real progress**

## **ESDinds Project**

**The Development of Indicators & Assessment  
Tools for CSO (Civil Society Organizations)  
Projects Promoting Values-based Education  
for Sustainable Development**

**(funded by the EU 2009-2011)**

# Civil Society Organizations

## all values based

- Alliance of Religions and Conservation(ARC)
- Earth Charter Initiative
- European Bahá'í Business Forum (EBBF)
- People's Theater
- possible addition: International Federation of Red Cross and Red Crescent Societies

# Academic Partners

**University of Brighton, UK**

**Charles University, Czech Republic**

The academic research partners help the CSOs to develop indicators that measure what they are trying to do, i.e. implementing values or spiritual principles

# The first step: What values?

- Each CSO needs to be clear about what it is trying to do
- in a way that might make it measurable
- Are values expressed in a vision, a mission statement, or other well-defined objectives?
- Are there clear project goals that reflect values?
- How do staff/members express values?

# An Example

# European Bahá'í Business Forum

## EBBF Vision

- **to enhance the well-being and prosperity of humankind**
- What indicators?
- GIWP – Gross International Well-being and Prosperity
- *Perhaps this is reaching too high*

# EBBF Mission

- **to promote ethical values, personal virtues, and moral leadership in business as well as in organizations of social change**
- Are there indicators of ethical values or personal virtues?
- Can these be measured at the individual level?
- (How ethical or virtuous are you?)
- or at the business/organization level?
- (How ethical or virtuous is the business?)
- Can we break this down to something more measurable?
- How would you assess moral leadership?

# EBBF Core Values

- **1. Business ethics (Ethical business practices)**
- What are these?
- Can we develop a classification to be more specific?
- Can they be measured?

# EBBF Core Values

- **2. Corporate Social Responsibility (Business has a social responsibility as well as an economic mission)**
- The economic mission is measured through wealth creation: sales, turnover, cash flow, capital value, stock market valuation, profit, etc.
- How can social responsibility be measured? (new ISO series)

# EBBF Core Values

- **3. Sustainable development  
(Stewardship of the earth's  
resources)**
- What is the business role?
- What indicators would apply?

# EBBF Core Values

- **4. Partnership of women and men**
- Are there indicators that go beyond the usual gender measures?
- What does partnership mean?
- How is it expressed in business?
- What indicators might measure this?

# EBBF Core Values

- **5. A new work ethic (Redefining the meaning of work)**
- What are existing measures of work? (hours worked, wage earned, energy expended, productivity (products, services, etc.))
- What should be included in a new definition of work?
- How do we measure this?

# EBBF Core Values

- **6. Consultation in decision-making (Non-adversarial decision making through consultation)**
- Are there ways of measuring such processes in a business?

# EBBF Core Values

- **7. Values-based leadership**
- What makes this different from any other kind of leadership?
- How would you judge good leadership?
- Based on what values?

# EBBF Core Values

- **7bis. Application of spiritual principles, or human values, to the solution of economic problems**
- First, can we define, and perhaps classify, the "economic problems"?
- For each problem, what are the spiritual principles/values that apply?
- Can we measure their application?
- Are their indicators of the solutions to the problems identified?

# Preparing a starting point

- What is the present state of the art?
- Who is doing creative work in this area?
- Are there already some indicators we can use?
- What more needs to be done (beyond the cutting edge)?
- What specific indicators would we like to have?

# Implementing the project

- Researchers are interviewing key people in each organization to identify values
- CSO projects are being identified to develop and test a first set of indicators
- Partners meeting in November will decide on first projects and possible indicators

# Comparative advantage of Bahá'í input

- Cross-disciplinary perspectives
- Clearer vision of the well-being and prosperity of humankind
- Inspiration from the Bahá'í writings and other scriptures
- Practical experience of members in their own lives and professional activities

# The hard part

- How do we go from the abstract (core value) to the practical (measurable result)?
- Diagnosis of a problem
- The immediate symptoms, the probable causes
- What is the underlying ethical/value/spiritual deficit behind the problem? What is missing?
- Can we measure this directly, through questionnaires, by proxy measures?

Some possible conceptual  
ways forward



# An important assumption

Just as darkness is the absence of light, so a problem reflects the absence of some value or spiritual quality.

We are therefore trying to measure the amount of something positive and its increase over time.



# Values:

behaviour that benefits society

- The individual operates on a spectrum from egotistical to altruistic, infantile to mature, base impulses to cooperative
- In society this is expressed as power-hungry, seeking status and social dominance, versus conscientious, egalitarian, communitarian
- The latter generally contribute to greater social good

# What might we measure?

Can we identify values/spiritual qualities as dimensions of presence/absence?

- Attraction to others: love <----> hate
- Statements: truthful <---> lying
- Possessions: honest <---> stealing
- Concept of self: humility <---> pride
- Response to challenges: patient <---> impatient
- Reflectiveness: thoughtful <---> impulsive
- Advantages of others; appreciative <---> jealous
- Priority: altruist <---> egoist

# Possible spiritual dimensions

- Response to needs of others: solidarity <---> selfishness
- Material reality: detached <---> attached
- Speaking of others: praising <---> backbiting, calumny
- Faults of others: forgiving, tolerant <---> blaming, intolerant
- Role in community: service <---> master (expecting service)
- Attitude to environment: love of nature <---> indifference

# Possible spiritual dimensions

- Aesthetic: beauty <---> ugliness
- Attitude to future: optimist <---> pessimist
- Response to unknown: attracted <---> prejudiced
- Reaction to provocation: calm <---> aggressive
- Use of reason: rational <---> irrational
- Concept of human purpose: spiritual <---> material
- Sense of social responsibility: collective <---> individualist
- Source of pleasure: happiness of others <---> hedonist

# Possible spiritual dimensions

(directly relating to religion)

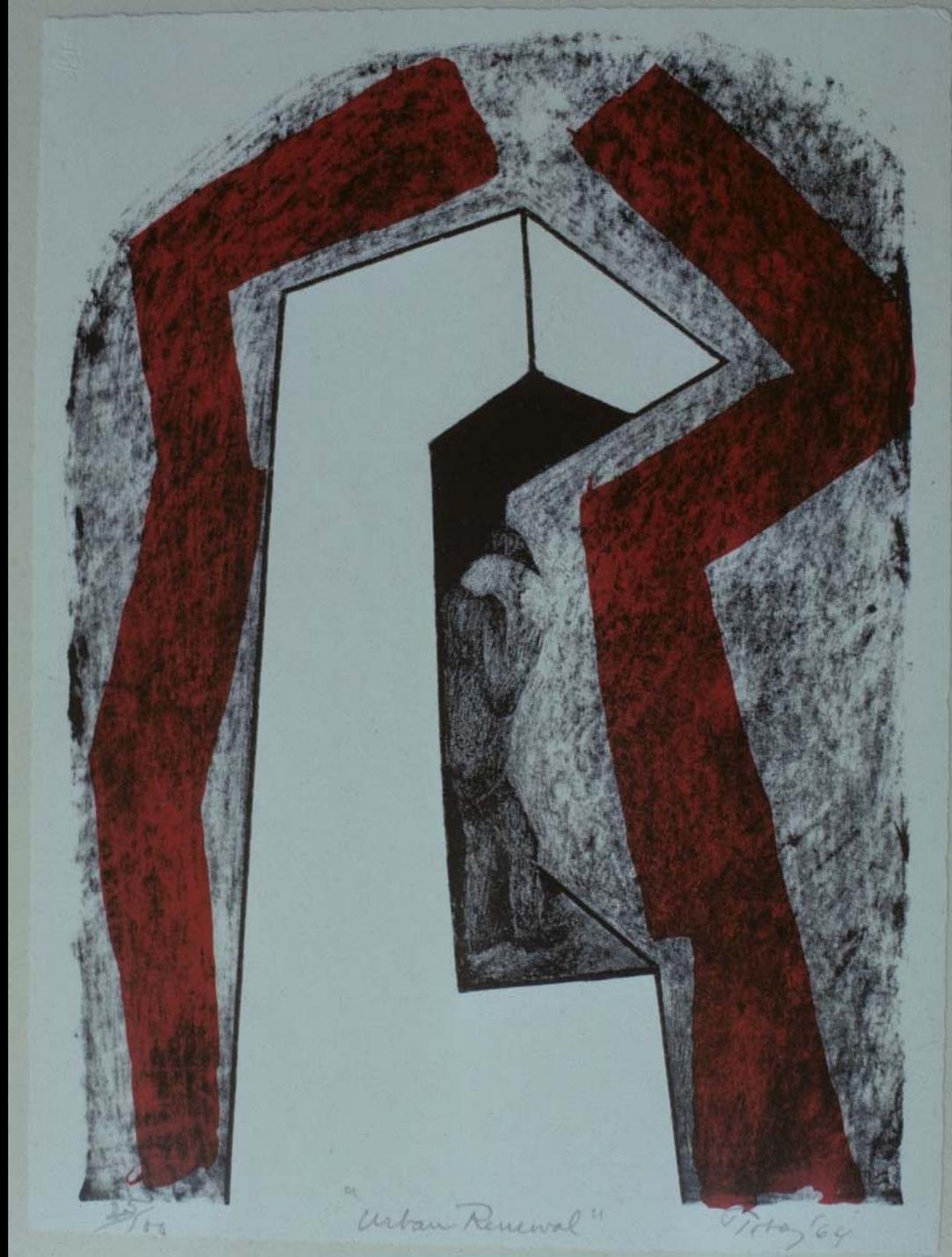
- Belief: in God <---> nothingness
- Daily attitude: prayerful <---> forgetful of God
- Ultimate authority: submission to the will of God <---> primacy to own will

# Possible spiritual dimensions

both individual and collective

- Confidence: trustworthy <---> untrustworthy
- Decision-making: consulting <---> deciding alone
- Treatment of people: justice <---> oppression, injustice
- Vision of time: long-term <---> short-term
- Gender attitude: balanced <---> macho/feminist

Can we find indicators for these spiritual dimensions?



# What is an indicator?

- An indicator is a sign that stands for or represents something, or more specifically a variable that summarizes or simplifies relevant information, makes a phenomenon visible or perceptible, or quantifies, measures and communicates relevant information (Gallopín, in Moldan et al., 1997).
- Indicators can be quantitative or qualitative, as long as the methodology gives them some coherence and reliability (i.e. questionnaire based, responses on a scale)

# LEVELS OF APPLICATION

Individual

Work group, team,  
study circle, class

Organization

Community



# A research challenge

Can we develop a taxonomy of values that is relevant across organizations and target groups?

This would help to cross-link and generalize efforts

# Possible tools

- Is there existing information, perhaps collected for other purposes?
- Qualitative or quantitative?
- Use of questionnaires or surveys
- Can we adapt things that already exist?

# *Global Ecovillage Network. Community Sustainability Assessment.*

<http://gen.ecovillage.org/activities/csa/English/index.php>

## CSA Social Checklist 4

4. Social Sustainability - diversity & tolerance; decision-making; conflict resolution

A. An estimate of how many community members value **diversity** and practice **tolerance**: Within the community? Outside of the community?

B. The extent to which the community has the power of **self-governance** regarding community issues

C. Is a non-discriminatory method agreeable to the community used for important community **decisions** and directions?

D. Decision-making is **transparent**: Information about decision topics is available to all - Any member of the community can attend decision making meetings

E. Decision-making processes are **inclusive**: There is a system by which any adult member of the community can have input in the decision making process - There is a system by which the **children** of the community can have input in the decision making process, as appropriate

## CSA Social Checklist 4, cont.

F. Estimate how many community members regularly **participate** in community governance and decision-making

G. Information/**training** is available in decision-making and mutual empowerment skills: For adult community members? For children in the community?

H. Estimate how many community members would agree that the decision-making system is successful in **difficult decisions**/situations

I. Are social difficulties and **disputes** successfully managed by an agreed upon system that is supportive, not punitive?

J. Do community members have easy access to this **conflict resolution** system?

K. Information/**training** is available in **non-violent conflict resolution** skills: For adult community members?

For children in the community?

L. Estimate how many community members would agree that their conflict resolution system: - is successful in dealing with difficult people/situations? safeguards **human rights**? promotes equality and **social justice**?

## CSA Spiritual Checklist 4

### 4. Community Glue

- A. How would most community members describe the **quality of life** in the community?
- B. How often does **sharing** occur among community members about beliefs, values and experiences?
- C. To what extent are **moral principles** (such as respect for oneself and others, responsibility for personal mastery and personal integrity) part of the community's philosophy and activities?
- D. To what extent does a **common vision** or purpose align and unite the community?
- E. Does community review and **renewal** of a shared vision and purpose occur?
- F. How often does the community **laugh, play, relax** and generally enjoy life together?

## CSA Spiritual Checklist 4, cont.

G. What is the level of **harmony, caring and support**:

- Between the women of the community?
- Between the men of the community?
- Between men and women of the community?
- Between the children of the community?
- Between the various age groups within the community?

H. **Sexual relationships** within the community are best described as:

- appropriate (for this community) and contributing to the overall well-being of the community?
- a source of social difficulties and unrest or problems within the community?

I. Does the community endeavour to strengthen its **internal bonds**(community glue)?

## CSA Spiritual Checklist 6

### 6. A New Holistic, Integrated World View

- A. To what extent does the community value **conscious living** (personal responsibility, personal growth and caring interaction with others)?
- B. Is human **diversity valued** and encouraged as important to the overall health and success of the community?
- C. Is there a shared sense of the community's place in and **contribution to the world**?
- D. How much has the concept of **sustainability** gained acceptance and use in the community?
- E. To what extent is there a shared commitment within the community to a **greater purpose** - "we are doing this for something greater than us" - for the greater good?

## CSA Spiritual Checklist 7

### 7. Peace and Global Consciousness

- A. To what extent is there **harmony** within the diversity, that is, the dynamic tension of people's differences is put to creative uses that benefit the community?
- B. How often does the community engage in activities that open the hearts and minds of community members to an experience of being **part of a greater whole**?
- C. When making important community decisions, does the community engage in activities that open the heart to deeper truths and **balance mind, body and spirit**?
- D. To what extent are community members aware of and take responsibility for the effects of projecting their emotional and/or mental energy into the **collective energy-field** of the community?
- E. How often do community members offer **selfless service**: within the community? outside the community?
- F. What value does the community place on **cultivating inner peace**?

# Possible uses

- For **individuals**: self-tests, employee ethical screening, evaluation of training activities (before/after)
- For **work groups/teams**: self-evaluation; management tools
- For **organizations**: internal review, external evaluation/certification

# Possible outputs

- Indicators of the impact of CSO activities
- Sets of indicators that can be offered to others to measure their progress
- Assessment tools (questionnaires, surveys, checklists, self-tests) from which indicators can be generated

# The ESDinds Project

- The Development of Indicators & Assessment Tools for CSO (Civil Society Organizations) Projects Promoting Values-based Education for Sustainable Development
- Partners: University of Brighton (UK) and Charles University (Prague);
- Alliance of Religions and Conservation (ARC, UK), European Bahá'í Business Forum (EBBF, France), Earth Charter Initiative (Sweden/Costa Rica), People's Theatre (Germany)

# The ESDinds Project

- CSOs define what they want to measure; academics help to define assessment methodologies and indicators; CSOs trial indicators in their projects; evaluation and sharing of experience. After the indicators are developed and tested, they will be shared more widely
- Duration: 2 years (January 2009-January 2011)

# ESDinds work plan

- research officers work with CSOs to identify values and projects
- detailed understanding of the CSO projects, aims and values summarised.
- university partners summarise for CSOs the state of the art in academic work on indicators relevant to projects.
- project website produced and maintained

# ESDinds work plan

- All parties meet and discuss ways to bridge the gap:
- between specific project aims and generic potential indicators
- between different generic indicators.
  
- Intensive consultation
- researchers understand the difficulties of the abstract indicators
- relationship to project realities
  
- researchers visit some projects on the ground
- obtain contextual knowledge

# ESDinds work plan

- researchers consult, discuss and learn from the CSOs
  - develop new possible indicators and assessment tools
  - possibly in various layers
  - all parties agree on new draft indicators
  - potential to be generically useful
- 
- researchers will visit some projects
  - consider in detail how they can be implemented
  - consult with project managers
  - determine and understand practical difficulties

# ESDinds work plan

- field experimentation
- follow draft indicators and tools through parts of projects
- iterative process
- analysis of results
- all parties sent reports
- invited to consult further
- second generation of proposed indicators
- learn from problems with draft indicators
- agreeing on improved indicators
- consider again at the project level
- Goal: set of relevant indicators produced with practical research at the project level

# ESDinds work plan

- Parallel activity to second iteration
- disseminate first-stage results
- actively seek other CSO groups
- by second-stage results
- invite 50-80 other CSOs to respond to the ideas developed.
- given indicator methodology sheets from first iteration of testing new indicators
- asked to test them and/or give feedback
- invited to engage in active discussion at series of workshops over three days in last month

# ESDinds work plan

- Workshops over three days in last month
- collect and summarise views of many more CSOs
- conclusions of workshops published and shared internationally
- new community of CSOs involved in developing and using common indicators for spiritual values-based education for sustainable development

## FOR FURTHER REFERENCE

ESDinds project: <http://www.esdinds.eu/>

International Environment Forum page on Indicators:

<http://www.bcca.org/ief/el/elind.htm>

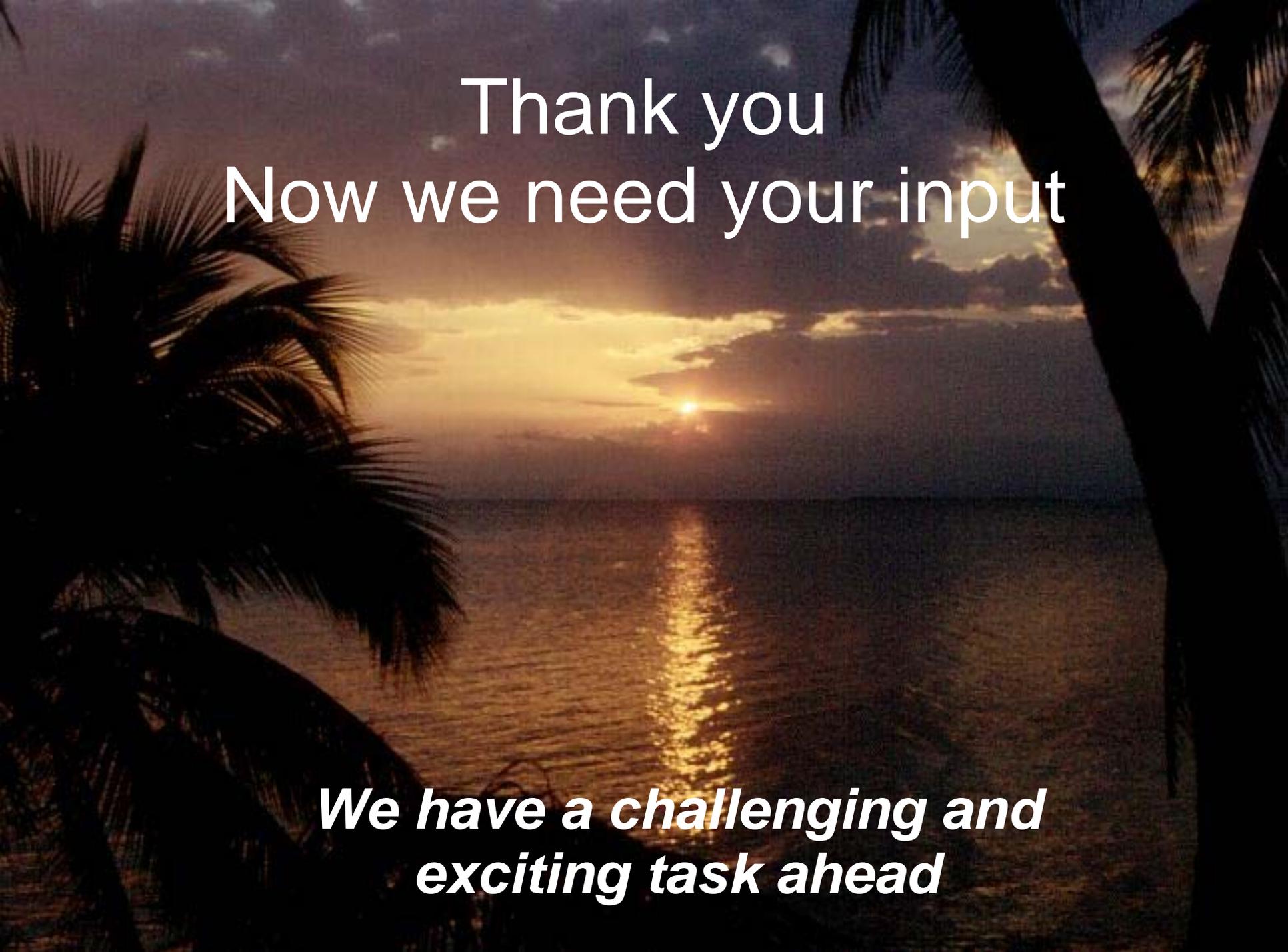
Bahá'í International Community (1998). *Valuing Spirituality in Development: Initial Considerations Regarding the Creation of Spiritually Based Indicators for Development*

<http://www.bcca.org/ief/bicvsid.htm>



**International Environment Forum** A Baha'i inspired organization addressing  
the environment and sustainable development

<http://www.bcca.org/ief>

A sunset over the ocean with palm trees in the foreground. The sun is low on the horizon, casting a golden glow across the sky and reflecting on the water. The palm trees are silhouetted against the bright sky.

Thank you  
Now we need your input

***We have a challenging and  
exciting task ahead***

# Workshop tasks

- Identify additional inputs for state of the art
- Possible collaboration with other activities
- Potential organizations to invite to trial indicators in second stage
- Brainstorming on potential indicators