



# SOUL & SOCIETY FRAMEWORK

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ecosystem  
restoration  
communities

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## WHY DO WE NEED TO MONITOR AND EVALUATE?

Besides helping the recovery of ecological functions, the ERC movement aims at the restoration of interrelated human systems, both at the individual (Soul) and the social/community level (Society). As we work together to restore degraded ecosystems, individuals and communities change too. Such multidimensional transformation is what we intend to monitor and evaluate using our *Soul* and *Society* indicators.

So, to understand what is happening, monitoring and evaluation is required. This way we can assess how the livelihoods, thoughts, views, attitudes, knowledge and skills of the people involved are affected by our work. This includes people living and/or working at ERCs, those volunteering, learning and/or living around ERCs.

For example, the goal to ‘empower ordinary people to take the lead in ecosystem restoration’ could be monitored by assessing whether ERC activities have so-called ripple effects, inspiring wider circles of people to work in restoration, or even start run their own local ERC projects.

By learning how people think and feel about our work, we will be able to adapt what we offer to something more in line with what people are looking for. We can learn from our mistakes, and improve our offerings and our practices.

## WHAT IS THE DIFFERENCE BETWEEN MONITORING AND EVALUATION?

In this context, monitoring is the regular collection of information to learn about the impact that our work is having on the individuals and their communities. For the Soul and Society indicators, which this guide is written to guide you through, our main method of monitoring is surveys. Additionally, semi-structured interviews might be used to follow-up with individuals or cases of increased interest (key-informants). Sending off these surveys to their targeted audience to collect regular information is key to successful monitoring of Souls and Societies undergoing restoration. Evaluation is gathering the responses from the surveys and analyzing them, to pull out patterns and trends to tell a story of how ERCs are impacting people and society.

## OUR HOLISTIC FRAMEWORK

We have designed a monitoring and evaluation framework that measures the impact ERCs are having according to three categories: Soil, covering the ecological transformation happening on the ground; Soul, reflecting changes in people’s attitudes and behavior; Society, relating to the positive impact on human societies and economies linked to the degraded nature of the ecosystems around them. We know that ecosystem restoration affects all three of these areas, hence our designing of a holistic framework that measures changes across all three.

### SOUL

Outcomes	Indicators	Means of Verification
Those interacting with the ERC as volunteers (visitors, students/interns, volunteers) are positively impacted by their experience	<p>ERC KPI: # people reporting positive personal changes (supported by stories of change)</p> <p>Other: #people reporting feelings of empowerment, after leaving the ERC and 1 year after</p> <p>#people feeling empowered to, e.g, apply restoration techniques</p> <p>#people reporting increased oneness with nature</p>	<p>ERC People Survey #1</p> <p>ERC People Survey #2</p> <p>Semi-structured people interviews</p>
High numbers of people are engaging with, and committing to, ecosystem restoration	<p>ERC KPI: # of people that participated in ERC activities</p> <p>Other # participants wanting to establish new ERCs</p> <p>#people returning to ERCs</p>	<p>ERC Leader Survey</p> <p>ERC Leader Interviews</p> <p>ERC People Survey #1</p> <p>ERC People Survey #2</p> <p>Community Survey</p>

SOCIETY

Outcomes	Indicators	Means of Verification
<p>A growing symbiotic community of actors working to restore degraded ecosystems and whole landscapes</p>	<p>ERC KPI: # 'beyond the fence' partnerships between ERC &amp; local/relevant stakeholders</p> <p>Other: #people reporting to have regular contact with the ERC</p>	<p>Community Survey ERC Leader Survey Interviews</p>
<p>The presence of the ERC is positively affecting the livelihoods of the people living within and around the ERC</p>	<p>ERC KPI: # of livelihoods created/impacted</p> <p>Other: #people reporting improved economic situation</p> <p>#people reporting benefits from skills/knowledge provided by ERC</p> <p>#people reporting that ERC benefits their community</p>	<p>Community Survey ERC Leader Survey Interviews</p>

## WHAT ARE WE MEASURING?

As you can see from the tables above, there are some targets or outcomes we hope to, (to a significant degree), see happening as a result of our work. The indicators mentioned are specific, observable, and measurable phenomena that we can use to show changes or progress towards achieving those desired outcomes. Through means of verification like digital surveys, interviews and log systems (e.g. spreadsheets, diaries and journals), we qualify and quantify those indicators.

At the global level of the global ERC network, Key Performance Indicators (KPI) have been identified as critical indicators of ecosystem restoration, thereby helping us to work towards shared goals and communicate progress. Besides the KPIs, other indicators can be defined and/or “extracted” from survey questions in line with project-specific targets. To do this, we need methods (surveys and semi-structured interviews) that enable us to collect data on *Soul* and *Society* indicators from our target/sample audience. These surveys (or means of verification), allow us to assess, quantitatively and qualitatively, our progress so far and whether we’ve achieved our stated outcomes or not. At a later stage, after the collection and preliminary analysis of survey data, semi-structured interviews might be useful to get a deeper understanding of how people are being impacted by ecosystem restoration projects, while capturing or sharing/voicing personal and societal shifts.

Our surveys were developed using KoBo Toolbox<sup>1</sup>, an open-source toolkit for data collection and management, widely used in humanitarian contexts. KoBo Toolbox allows users to not only design the surveys, but also to distribute them in different ways, store respondent data in the KoBo cloud, and access/analyze data easily.

This platform allows for 3 different means of survey distribution (the context of each ERC should be considered in determining which one to use):

1. Online via a link: each survey has a link associated to it that needs only to be shared, for example, via email, so that sampled individuals have access to it and can fill it in. The submissions will be automatically saved on the KoBo Toolbox website and available for analysis or download.
2. Online/Offline via KoBo Toolbox app: with the KoBoCollect app, it is possible to access and distribute the surveys, either online or offline, using a mobile phone or a tablet. The submissions will be saved on the KoBo Toolbox website and available for analysis or download.
3. Offline via printed forms: a printable version of the surveys is possible when the previous alternatives are not feasible. Collected data needs to be sent to

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<sup>1</sup> Check [this video](#) tutorial on how to utilize KoBo Toolbox app, KoBo Collect.

the Monitoring & Evaluation team via email, either as photographs or scanned documents.

## SAMPLING DESIGN AND TIME FRAME

In statistical language, samples are representative subpopulations of the whole population we are interested in surveying. In situations where the group of interest is very large, it would be too difficult and time consuming to survey every single individual. In such cases, sampling, i.e., selecting a smaller target group, is recommended.

As we are measuring progress and changes in time, a timeframe is necessary to define how often and when these surveys should be conducted. Below is what we suggest in terms of how to select your sample sizes and timeframes for each survey (hyperlinked), and for the interviews.

## ERC PEOPLE SURVEY #1

[VIEW SURVEY 1](#)

This first survey has been created to assess how Earth Restorers, i.e. people joining (or affected by) the work of ERC, feel about their experience and whether, and how, it has impacted their life. There are 28 questions in this survey, and it should take around 15 minutes to fill it in.

If possible, we recommend sending this survey to all campers<sup>2</sup> via email, on the last day of people's journey with an ERC project (e.g. volunteering and/or participating in actions, workshops and other offerings at ERCs). The best is to allocate time for campers to fill this survey at the end of such experience/program, while they are still on site and the effects of their work "fresh". If that is not possible, it is good to invite participants to fill this in as soon as possible. As we do not expect that everyone receiving it will fill it in, the sample size is not predefined and depends entirely on the number of responses obtained.

When it is not possible to send surveys via email (for example, due to limited digital devices or access to internet), consider having a tablet with the app installed on site to help people respond to the surveys, or to have printed versions available.

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<sup>2</sup> See Appendix 1 for a template email/message for this purpose

Good practice would be to have at least 50% of the participants of each experience respond to the evaluation survey.

## ERC PEOPLE SURVEY #2 / INTERVIEW

[VIEW SURVEY 2](#)

This survey was designed to investigate how the feelings and impacts reported in the first survey have changed or been sustained over time.

As a one year follow up, the ERC People Survey 2 should be sent via email one year after the first survey was completed. This way, your final sample is composed of people who filled in both surveys, which you can use to analyze your findings.

By surveying one year after the experience with ERC, we hope to be able to assess longer-term effects of restoration experiences on participants. Where more nuanced data is required or desirable, semi-structured interviews are strongly recommended (see Appendix 4).

## ERC LEADER SURVEY / INTERVIEW

[VIEW SURVEY 3](#)

This is the survey where you, as ERC leaders, can share your thoughts, feelings and interactions with your ERC and your role. It is also the moment we have to better understand how the ERC foundation can better support the work of ERC initiatives. Another important outcome assessed by this survey is, for example, the number of collaborations/partnerships established between the ERC and surrounding community (question 25).

We recommend that you do some stakeholder mapping<sup>3</sup> in preparation for this survey. This exercise should help you to get your head around the constellation of key allies, partners, people and entities impacted by your work.

For ERC leaders, it's as simple as filling it in once a year, at the same time each year. For example, you could fill it at the end of the year.

## COMMUNITY SURVEY / INTERVIEW

### VIEW SURVEY 4

The community survey has been designed to find out what members of the local/regional Ecosystem Restoration Community think and feel about the ERC projects.

We recommend that you do some stakeholder mapping<sup>3</sup> in preparation for this survey. Then, select 10 community members from your map that are representative of the different voices and positions within your community, and set up times to interview them. The survey questions can be used as an interview script.

In addition to the previous, in order to measure how well the ERC is integrated in the broader landscape, a randomized sampling is recommended. This can be achieved, for example, by randomly choosing individuals in the street to survey. Wor places where community members are likely to be found (e.g. local markets, associations, shops and/or coffee places).

It is important that a neutral person (e.g. s volunteer) carries out these surveys, and not the ERC leaders. This is because whoever is answering the survey may struggle to be completely honest and say what they really think and feel about the ERC to the people managing it (leading to a bias). They will feel more comfortable being unfiltered and truthful to a neutral interviewer. You could also send the survey to them electronically and allow them to fill it in themselves, particularly when time/human resources are limited.

It is likely that members that live around your ERC initiative will not be English speakers. Therefore, translation of the survey might be needed before it is conducted/sent out. Reach out to [mick@erc.earth](mailto:mick@erc.earth) if you need help with this.

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<sup>3,4</sup> See appendix 2 and 3 for examples of stakeholder mappings.

## WHAT WE'LL DO WITH THE RESULTS

Once the surveys have been filled in, our Monitoring & Evaluation team at the foundation will read through all the responses and pull out the findings. We will analyze the responses to discover how the ERC movement is impacting the people that interact with it, and we will create annual reports that tell the numbers and story of how the ERC is transforming individuals and communities. We will also learn, based on the feedback from the surveys, how to change, improve and adapt what we do to better suit the people engaging with the ERC movement.

The data collected will be accessible to its managing team either through ERC's open M&E database or through the ERC Knowledge & Impact team. Towards the end of each calendar year (or beginning of the next year), annual reports will be published on the ERC website, including infographics based on *Soul* and *Society* data. Quotes from surveys and interviews, when approved by the author, might also be included in such reports and/or shared through ERC's social media and communications channels.

## CONCLUSION

The best way to grow, develop and improve as a movement is to find out about the impact we are having on the ecosystems, the people doing the restoration work, and the people that live in/around those ecosystems.

By putting together these surveys, we hope that they will achieve this ambition of discovering the thoughts, feelings, improvements in knowledge, skills and livelihoods that the ERC movement exists to enhance and transform.

If you have any further questions or needs for clarification about the surveys, please email [mick@erc.earth](mailto:mick@erc.earth) for support.

Together, we are restoring the Earth and the human spirit!

## TEMPLATE EMAILS FOR (TEMPORARY) ERC MEMBERS

*(Send at the end or shortly after ERC program or activity)*

Dear ...,

We sincerely hope you had a meaningful time during our (*ERC program/experience/course name*). While the experience is “fresh”, we would love to hear your feedback via this survey (should take approx. 15 minutes of your precious time). Your input is invaluable as it helps us to monitor our objectives and essentially improve the quality of future ERC offerings for people like you.

Huge thanks on behalf of ERC ..., the Global Foundation and the whole planet,

(signature)

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*(send 1 year after “survey 1” was filled in)*

Dear ...,

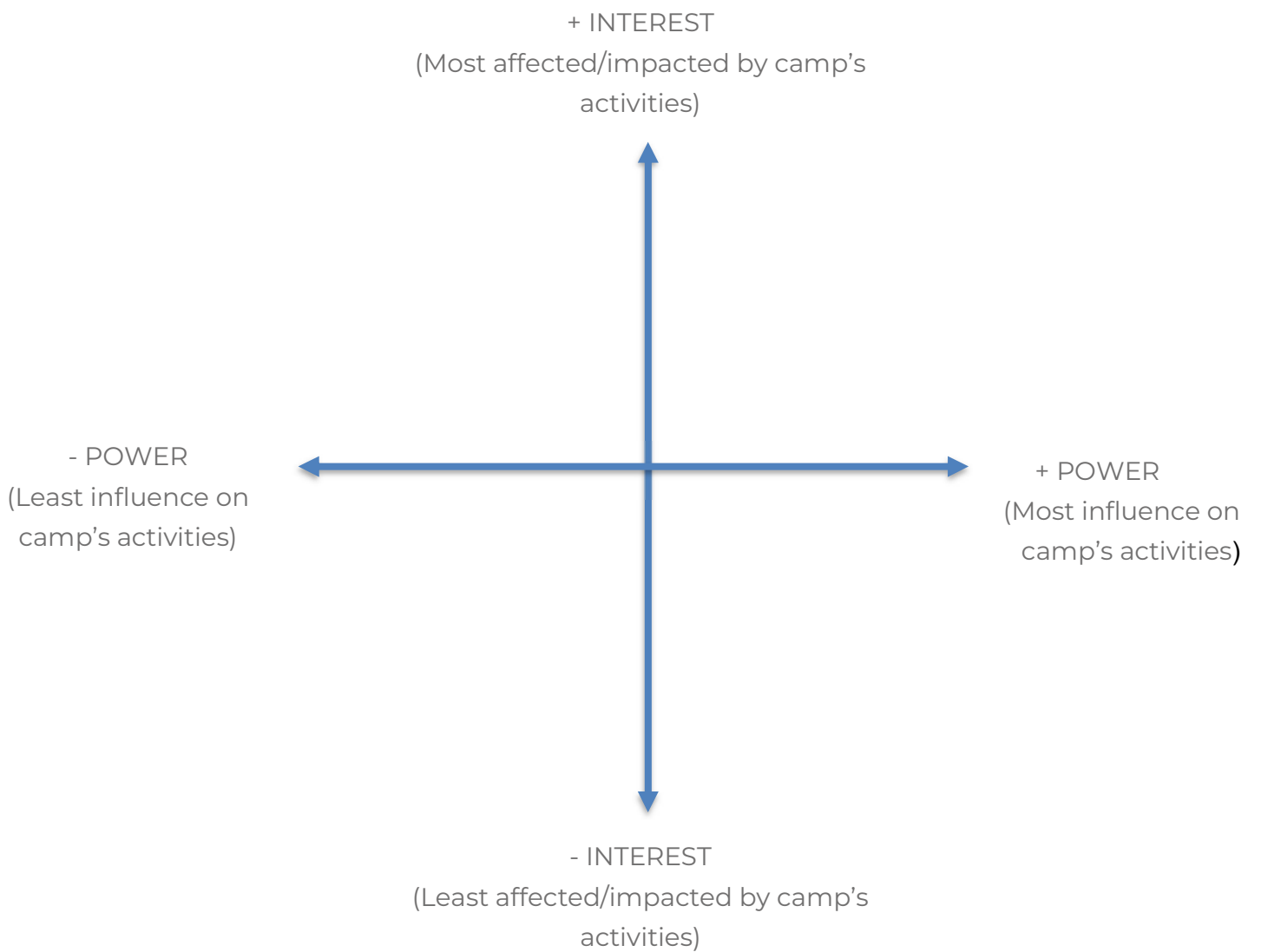
One year has passed since we received your important feedback on your experience at the (*ERC program/experience/course name*). Thank you for the useful input you offered!

We are curious to hear what still resonates and what might have gotten blurrier since you had that experience with us. Therefore, we invite you to fill in one other survey (takes approx. 15 mins).

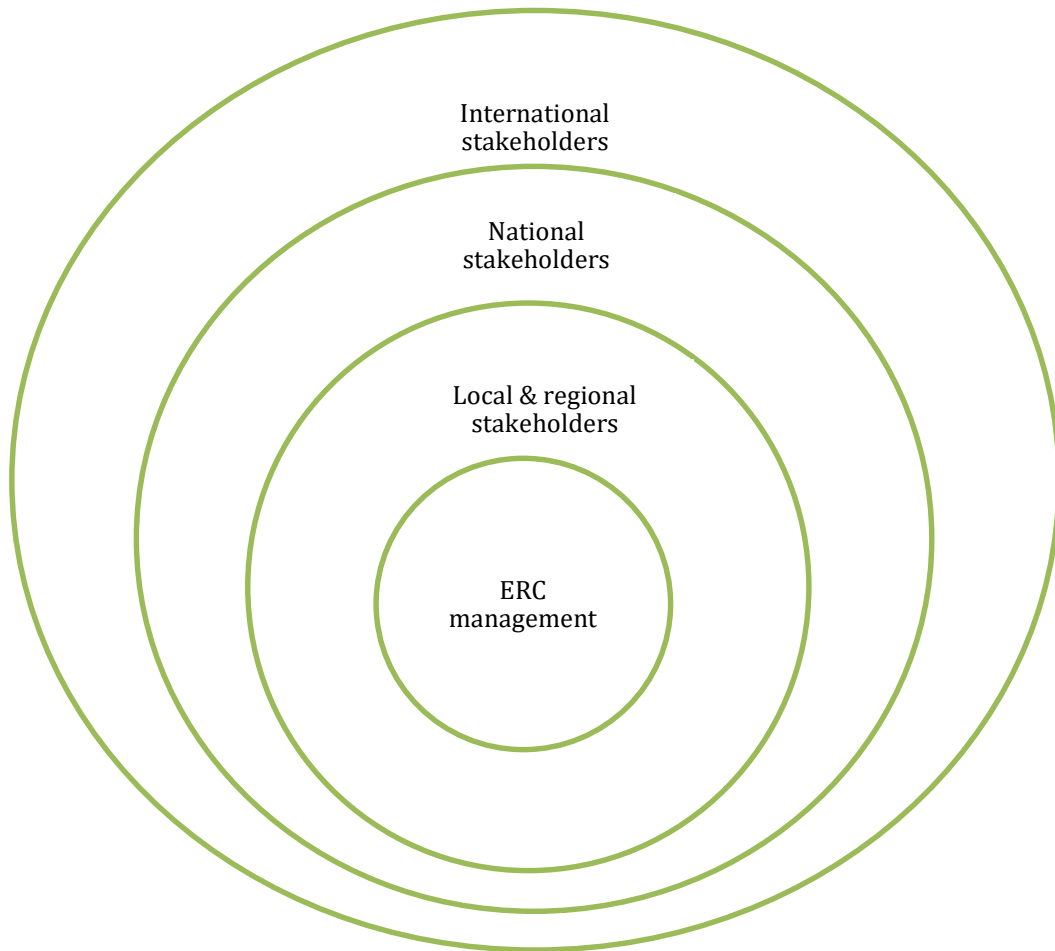
Huge thanks on behalf of (*ERCNAME*), the Global Foundation and the whole planet,

(signature)

## STAKEHOLDER MAPPING BY INTEREST & POWER



STAKEHOLDER MAPPING BY SPHERE OF INFLUENCE



## GUIDANCE FOR CONDUCTING SEMI-STRUCTURED INTERVIEWS

Semi-structured interviews can be a powerful tool to collect unbiased information and more nuanced insights. They allow the interviewer to adapt to the individual in front of them, while keeping a general common structure.

For the community members, we recommend using Survey 4 - Community Survey, as the general common structure to follow, i.e. these questions are posed to all the surveyed individuals, no exception. In addition to the question items on the survey, the interviewer can, and should, ask follow-up questions whenever pertinent.

Let's consider a few examples of how this may look like in practice: if someone affirms to be collaborating with the ERC initiatives (answering 'yes' to question 9), when asking them about the nature of their collaboration (question 10), the interviewer can follow up with questions regarding personal/professional motivations behind - or satisfaction/benefits perceived in - such collaborative efforts; whenever further clarification is required, the interviewer may ask "why" or "what is meant by" questions; topics of great interest to the ERC and/or interviewer can be explored via more in-depth conversations, though appropriate time management is essential to cover the main structure of the interview.

In sum, the interviewer has the freedom to go beyond predefined questions while adopting a systematic (semi-structured) approach, which is particularly useful when key information and knowledge could be left out by following scripts rigidly.

For the volunteers, there might also be situations when semi-structured interviews prove to be extremely useful. Namely, having a follow-up interview with someone whose survey response was especially interesting allows the ERC foundation to capture deeper stories, opinions or thoughts relating to our impact; these stories can be turned into blogs, videos, and other forms of (social) media content.

For these interviews, we recommend that you use responses to the previous surveys as a starting point, and further develop those you have a special interest in. For instance, one volunteer mentions having felt empowered and improved their feelings of hope towards the future, both on Survey 1 and Survey 2, and shows enthusiasm in the open questions; however, no answers were obtained when asked for specific examples. In the interview you could ask for such examples of personal change. It might also be true that someone had a very negative experience with ERC. In this case, semi-structured interviews can help to better understand what happened and how to improve ERC offerings in the future.