

Chapter 6

The Evaluation of the Holistic Development of Children and Adolescents

Challenges in Building a Participatory Evaluation based on the Work of CSOs in Brazil

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Abstract

This chapter analyses how Itaú Social, in partnership with Civil Society Organisations (CSOs), developed a Holistic Development Evaluation for children and adolescents in a participatory way. The aim of the evaluation was to raise awareness of the different dimensions of Holistic Development, to encourage reflection on experiences essential to such development, to support the training of educators, and to identify progress in the work of CSOs. CSOs are important agents in promoting holistic development, especially in vulnerable areas. Building the Holistic Development Evaluation involved the active participation of CSOs across six stages, including the definition of the dimensions and subdimensions of holistic development, the creation of data-collection instruments, and the validation of the methodology. The chapter describes the challenges and lessons learned from a participatory process, such as the need to balance power among participants and to ensure mutual understanding among the stakeholders involved. It concludes that the participatory evaluation of holistic development is a complex process that requires the participation of diverse stakeholders and the creation of spaces in which children and adolescents can be heard.

Keywords

Holistic Development, Participatory Evaluation, Civil Society Organisations, Holistic Education.

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Introduction

The Statute of the Child and Adolescent (*Estatuto da Criança e do Adolescente*, ECA), established in Brazil by Law No. 8,069 in 1990, guarantees that every child and adolescent has the right to life; the right to health; the right to freedom, respect and dignity; the right to family and community life; the right to education, culture, sport and leisure; and the right to vocational training and to protection at work. Guaranteeing these rights is the responsibility not only of the State and families but of society as a whole.

However, Brazil faces a major challenge in this area: there are structural inequalities that reduce opportunities for holistic development, especially for historically excluded groups such as Black children, children with disabilities, Indigenous children, children in rural areas, and children from low socioeconomic backgrounds. Transforming this situation means breaking with narrow conceptions of human development and education, as well as with the forms and uses of evaluations aimed at improving social programmes. In this context, the Covid19 pandemic has deepened the existing inequalities that reduce opportunities for holistic development, especially for historically excluded groups, making it even harder to guarantee the full development of children and young people.

At present, our educational framework prioritises only certain dimensions, such as the cognitive one, through the teaching of traditional subjects, and neglects

others that are equally important, such as the cultural, the social and the physical, starting from a limited perspective of what education is. There is also an impoverishment of the perspective on what education and holistic development are when we fail to recognise other learning spaces beyond the school, which are essential to reducing social inequalities.

The *Cada Hora Importa* (Every Hour Counts) study²⁰, carried out by Itaú Social and Plano CDE in 2021 (Itaú, 2021), shows that, by the age of 15, children from the wealthiest families have received on average 7,000 more hours of learning than boys and girls from the poorest families. This gap is equivalent to almost 8 years of study at an ordinary school. This calculation takes into account the hours of learning opportunities in formal education from early childhood onwards, as well as learning within the family environment and extracurricular activities such as language courses, the arts, and cultural activities such as cinema and theatre, among others. This is why civil society organisations (CSOs) can change the rules of the game, especially in extremely vulnerable areas.

But how can strategies geared towards holistic development (HD) be evaluated in order to generate lessons that improve policies and programmes? Different organisations or research groups have developed benchmarks for the evaluation of HD, but not always from a participatory perspective. So, what

²⁰ This study draws on the work of the United States nongovernmental organisation ExpandEd Schools, which estimates, in hours, the gap in learning opportunities for children and young people in that country. See ExpandEd Schools (2013).

happens when one chooses to value local communities and the knowledge of stakeholders outside the school, such as CSOs, throughout the entire evaluation process?

The aim of this chapter is to discuss Itaú Social's strategies and the lessons learned in building a Holistic Development Evaluation (HDE) framework carried out with the active participation of community-based social organisations. With this framework, our aim is to:

- raise awareness of the different dimensions that make up HD;
- encourage reflection on experiences that are essential to promoting these dimensions;
- support educators' training processes and improve actions;
- identify progress and raise the profile of CSOs' work.

The key word is learning. Therefore, rather than producing performance rankings that might stereotype children and organisations, the model proposed for building and implementing the HDE focuses on the formative aspects that can be generated throughout this process and through its results. In this regard, the participatory construction of the framework itself and of its instruments becomes a fundamental element. This chapter shares the processes and learning of this journey, discussing the vision of HD and the role of CSOs in promoting it. To this end, the following section describes the theoretical framework of holistic development in the work of CSOs and links it to the support provided by Itaú Social in a concrete experience. The chapter then gives an account of the process of building the participatory

evaluation, describing and analysing its six stages. Finally, it closes with a reflection on the lessons learned from this experience and the main challenges identified for the future.

The framework of holistic development in the work of CSOs and the support of Itaú Social

The Holistic Development framework

The holistic development of children, young people and adolescents is the combination of different processes that converge to allow human beings to flourish in the broadest and fullest sense, so that they can be and do what they value and seek in life and can influence society. It involves considering the multidimensionality of the individual, ranging from elementary functions that are essential to life, such as adequate physical/motor development, through to more complex skills and competencies such as the exercise of autonomy (Sen, 1999; Alkire, 2002)²¹.

²¹ This definition is based on the Human Development approach of Amartya Sen and other thinkers who follow this author, such as Sabina Alkire (2002).

This perspective aligns with the concept of Holistic Education, which recognises the centrality of the individual and the importance of promoting experiences not only for intellectual development, as is often prioritised, but also for physical, social, emotional and cultural development. Promoting holistic development means giving importance to all of these different dimensions without ranking them hierarchically, understanding that they are irreducible, incommensurable and self-evident, as Alkire argues with regard to her vision of human development (2002):

Put differently, the dimensions of development are like the 'primary colors' of values. An infinite range of shades can be made from our primary colours, and not every painting (or life or community or income generation project) uses all or even most shades. But if, for example, all yellow hues were entirely missing, then my understanding of color would be consistently skewed. Similarly, while not every community activity will reflect every dimension, if all expressions of the dimension of friendship (such as solidarity, compassion and affection) are missing then our framework of human development may be fundamentally skewed. (p. 186)

In addition to recognising the multidimensionality of holistic development, it is also important to understand the processes that will genuinely make it possible to advance towards this full human flourishing.

Thus, the evaluation of holistic development is much broader than focusing on performance across various competencies: it involves considering the social construct of how these are achieved in relation to opportunities and experiences.

Holistic education is fundamental to promoting this holistic development because it includes the factors, conditions and processes necessary for it: spaces, times and content. The spaces are the different environments in which multiple learning experiences take place with the participation of different stakeholders. These refer not only to the school, but also to spaces such as the family and the community. Time, for its part, goes beyond the concept of chronological time and refers to the subjective learning time that each child may have in their development, according to their particular characteristics. Finally, content for the learning and development of children and adolescents is produced in different formats and languages, designed so as to come close to the realities in which children and adolescents live and interact, in a way that is meaningful to them.

Table 1 indicates the existence of conditions and processes that influence holistic development, and it is in these aspects that the role of social organisations must be recognised, especially in the most vulnerable territories.

Stages	Components
Conditions	- Infrastructure - Resources - Provision/Access - Spaces - Social assets and organisations in the territories - Training of teachers and social educators - Socioeconomic status - Mindsets and expectations
Processes	- Teaching Practices - Quality of the experience - CV - Community participation and inclusion - Networking with agents, sectors and civil society organisations - Family participation - Ways of organising time and space for educational experiences
Outcomes	- Multidimensional outcomes of the subject: Emotional, Cultural, Social, Physical and Intellectual

Table 1. *Conditions, processes and outcomes in the promotion of holistic development*
*Source: Authors’ own elaboration*²²

HD depends on the conditions both of the family environment and of the opportunities available in the area (for example, the school), or on the possibility of accessing other learning opportunities: for example,

²² Based on studies by the Itaú Social Foundation and CENPEC (2011), and by the Reference Centre for Holistic Education (Weffort, Andrade & Costa, 2019).

those offered by CSOs. The results of HD are therefore multidimensional and reflect the progress of children and adolescents in each of these aspects. Thus, it is not expected that all children and adolescents will become superhumans competent in every area of development, but rather that they can have learning opportunities that allow them to experiment, broaden their repertoire, and acquire greater tools and skills to develop throughout life.

The work of CSOs and the support of the Itaú Social Foundation

According to data collected by *Todos pela Educação* (All for Education) (2021), there were more than 650,000 children and adolescents aged between 6 and 17 in Brazil who were out of school and deprived of their fundamental right to education. This situation is a violation of the Federal Constitution of 1988, which establishes that the right to education is a shared responsibility between the State and society as a whole. In turn, the violation of the right to education is part of a series of violations that occur in our society and that prevent the full development of children, adolescents and young people, such as food insecurity, child labour, various forms of violence, and social exclusion (Macana *et al.*, 2022).

The 2022 Map of CSOs by the Institute for Applied Economic Research (IPEA) (2022) reveals that more than 500.000 civil society organisations operate in

Brazil, working in areas such as the defence of rights, culture, leisure, social assistance, education and research. These CSOs play a crucial role in the holistic development of children, adolescents and young people, giving them access to culture, education, sport and leisure activities. However, despite the importance of their work, CSOs continue to face a lack of recognition and broad support from society, as demonstrated by the Brazil Giving Report 2021, which notes that one third of Brazilians do not trust the work of CSOs (Macana et al., 2022).

An important challenge for these organisations is to demonstrate their impact and to communicate the importance of their work to society, recognising that in the complex context of holistic development it is difficult to measure results and impacts. Through its work in the field of monitoring and evaluation, the Itaú Social Foundation seeks to promote a broader vision of the design, implementation and use of evaluations in order to support social programmes of different natures and complexities in favour of holistic development. Its principles in this regard are as follows:

- **Utilisation-focused evaluations and monitoring.** These should be intended to support management, improve programmes, and generate knowledge and learning, fostering changes in the promotion of quality public education with equity, geared towards the full development of children, adolescents and young people.
- **Methods as a means and not an end of evaluations.** Priority should be given to the use of mixed methods

and the triangulation of evidence in order to ensure methodological complementarity and a more complete response, with information gathered through quantitative and qualitative methods.

- **A systemic vision.** Evaluations should focus on the life cycles of programmes: ex-ante evaluations, process evaluations, evaluations of intermediate results (short and medium term), and impacts. Particular attention should be paid to the monitoring and evaluation of the key mechanisms for achieving the programme's objectives.
- **Valuing the collaborative process in evaluations and monitoring.** This entails taking into consideration the diversity and plurality of stakeholders (technical staff, CSOs, managers, beneficiaries, etc.).
- **Transparency.** The communication of results is considered a factor that generates transparency and learning.

The Holistic Development Evaluation is therefore implemented with the aim of providing a benchmark for measuring and evaluating the holistic development of children and adolescents, supporting pedagogical actions and the implementation of social projects and public policies. As a promoter of the ecosystem of social organisations that work on the holistic development of children and adolescents, Itaú Social has taken on the challenge of organising and funding the creation of the Holistic Development Evaluation framework and its evaluative tools.

On the basis of the evaluation principles presented above, the development of this framework was

grounded in a participatory construction that took into account the different perspectives of the CSOs and gave meaning to their work. Thus, the framework includes both a quantitative index for consolidating and analysing the results of the different dimensions, and also pays attention to the training process that CSOs can follow in order to work with children and young people.

Building the participatory evaluation: description and analysis of the 6 stages

Participatory evaluation

Social participation, which aims to involve citizens in the decision-making process on public policies through the work of Civil Society Organisations (CSOs), is regarded as a contemporary model of local public management and as a political-administrative principle. Fostering the participation of the various social actors in the design, implementation and evaluation of policies is regarded as a paradigm in many projects for development and

innovation of local public policies (Milani, 2008). In addition to being crucial in the decision-making process, social participation becomes fundamental in evaluation processes, in order to legitimise and support social actions in favour of human and territorial development. Likewise, participation can be regarded as a process of learning and capacity building both for the public sector and for these organisations (Ganzeli, 2001).

We can define participatory research and evaluation as evaluation processes that actively involve decision-makers or communities at different stages of the process (Creswell & Clark, 2018; Brandon, 1998). This is a type of evaluation that is not restricted to a single methodology. In the literature we can find some specific approaches, such as Collaborative Evaluation, which seeks to systematically involve decision-makers in the planning and implementation of a programme (O’Sullivan, 2012). Another approach, such as Empowerment Evaluation based on Fetterman et al. (2010), differs from the previous one in that it considers not only the involvement of participants, but also that they have control over the conduct of their own evaluation process and use the results as a form of advocacy to strengthen their own causes (Patton, 1997). Drawing on the work of Vaughn and Jacquez (2020), Figure 1 illustrates the differences in approach according to the degree of stakeholder participation in the evaluation or research.

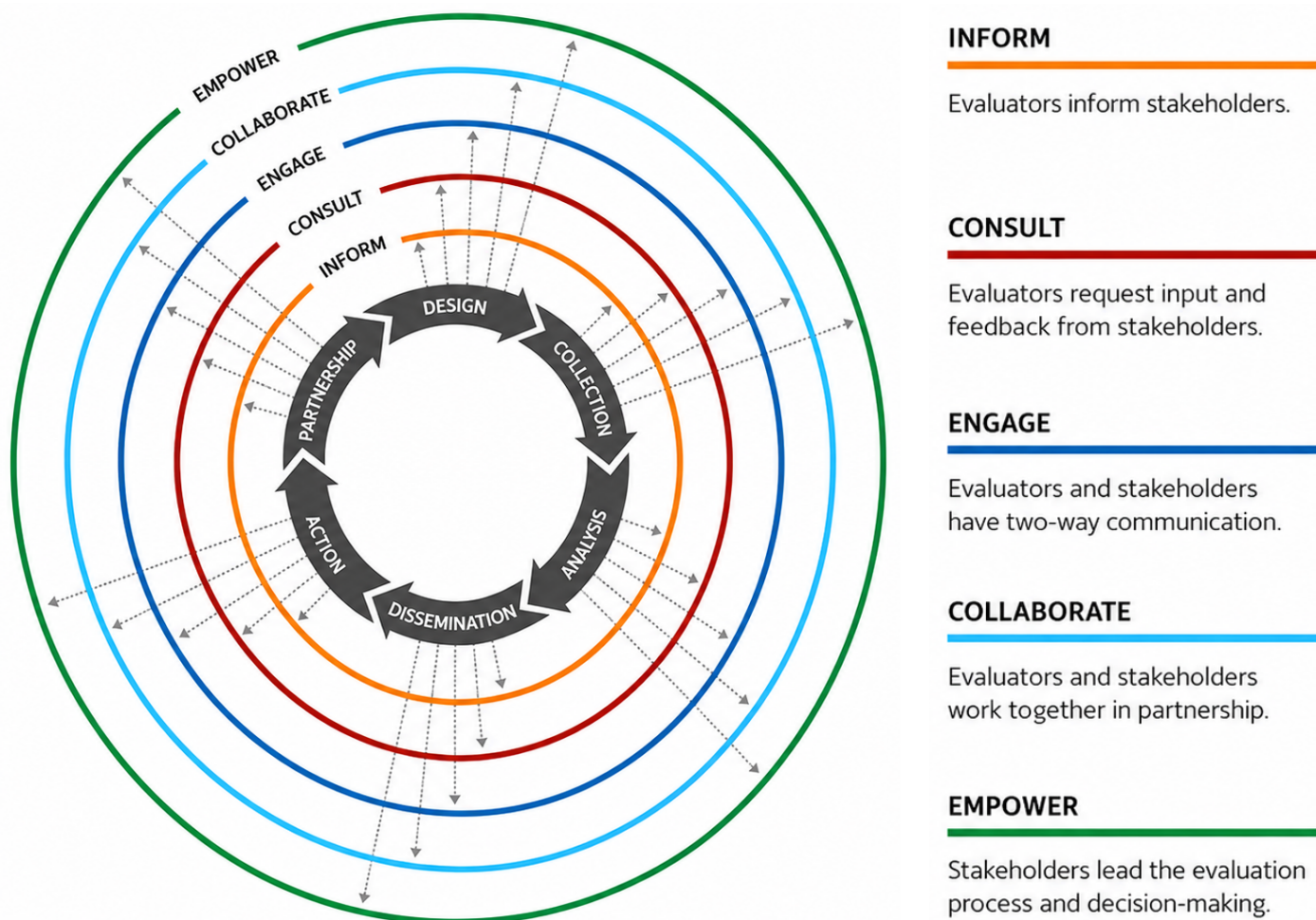


Figure 1. Levels of participation in programme evaluations
 Source: Adapted from Vaughn & Jacquez (2020)

According to Levin (1993), the purposes of participatory research that can be applied to evaluations can be distinguished across three spheres:

- a pragmatic purpose, in the sense of seeking to enhance the use of the research or evaluation;

- an ideological purpose, which seeks to ground choices according to particular perspectives; and
- a political purpose, which seeks to mobilise the action of the relevant actors.

Patton (1997) mentions a fourth purpose common to any type of participatory approach, which is the commitment to Capacity Building, whether of the community or of the actors. Capacity building is reinforced to the extent that learning occurs in the process and in the use of the results, which strengthens the capacity for participation and advocacy in order to improve interventions in communities and the causes themselves.

Creswell and Clark (2018) also mention that participatory evaluations seek to include the voice of the people affected by the problems, as well as being sensitive and responsive to the cultural and contextual reality of communities. To this end, complex evaluation designs are used, combining qualitative and quantitative approaches (mixed methods).

According to Burke (1998), participatory evaluation does not have a single step or methodology. It is best described through the set of principles chosen and the participation of stakeholders in the evaluation process. For this study, we followed the principles described by Burke (1998), which are more general so as to encompass any participatory approach within social programmes. They are described below:

- The evaluation must involve and be useful to the objectives and users of the programme: participatory evaluations should involve the groups

that will be directly affected by the object of the evaluation, that is, the main stakeholders.

- The evaluation must take the context into account, drawing on the interests and problems of the beneficiaries and users of social programmes: this will ensure that the results are more useful for the programme and its stakeholders.
- The evaluation methodology respects and uses the knowledge and experience of the stakeholders, which may be diverse or contradictory.
- The evaluation builds capacities both in the process and in the results for the parties involved: these capacities may be associated with the learning and empowerment of groups who have traditionally been marginalised. It is also related to the way in which stakeholder groups can be strengthened to carry out their own evaluation processes in the future.
- The evaluation favours collective methods of knowledge generation: participatory processes promote joint reflection and planning rather than merely presenting the conclusions of studies by a few specialists. The knowledge generated in this way can continue to be developed, enriched and used.
- The evaluators or facilitators of the process share a balance of power with the stakeholders of a programme.
- The actors who take part in the evaluation continually reflect on and self-critique their own attitudes, ideas and behaviours. In this way, learning is generated from the mistakes and successes of the evaluation processes.

For this evaluation we did not follow any specific approach; rather, we paid attention to the general principles described by Burke (1998) in order to design the way in which the CSOs would participate, while also

taking into account their availability of time and their commitment. Thus, the evaluation was built across six stages, as shown in Figure 2, with different degrees of participation, as defined by Vaughn and Jacquez (2020).

Participatory Evaluation of Holistic Development

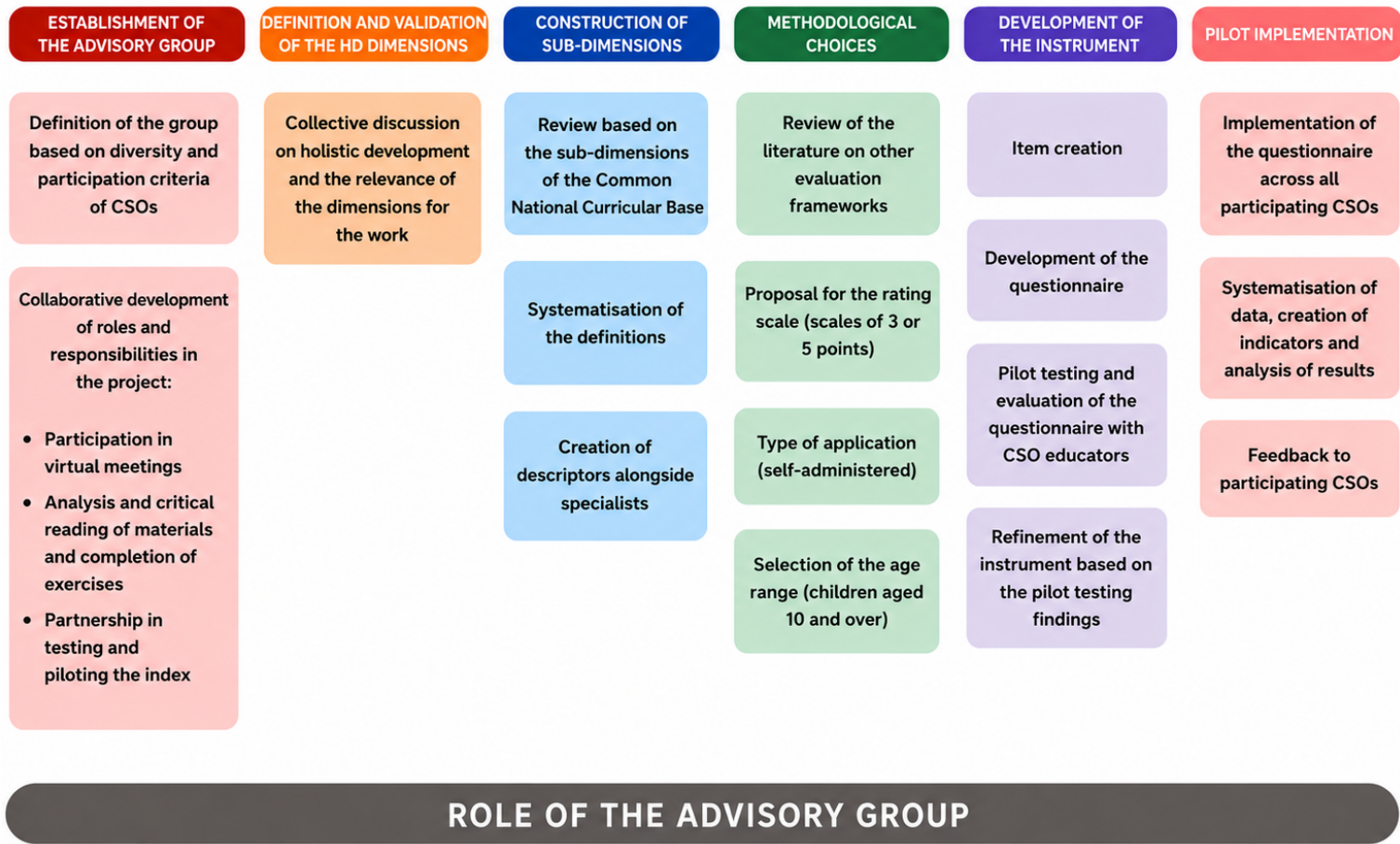


Figure 2. Participatory process of the Holistic Development Evaluation (HDE)

Source: Authors' own elaboration

The HDE was designed to meet a need of Brazilian social organisations, who lacked instruments to measure the effectiveness and impact of their actions on the holistic development of children and adolescents, and a need of Itaú Social which, as an organisation developing the Brazilian ecosystem of social organisations linked to education, needed an instrument to assess the impact of its funding on the end beneficiaries (children and adolescents). For this reason, in conversations with organisations supported by Itaú Social that operate in different regions of Brazil, this shared need was identified, and from there Itaú Social began to plan the development of this evaluation. The premise used to build this evaluation is that it does not seek to determine the quality or status of organisations in relation to the holistic development of children. The ambition of the HDE is to support the design and implementation of public policies and the strengthening of institutions that promote holistic development in Brazil. With the HDE we therefore seek to:

- Rate the design, planning and execution of projects
- Support training processes
- Identify the challenges and progress of organisations

Nor does the HDE seek to produce results rankings that might stereotype children and organisations. For this reason, its model of construction and implementation focuses primarily on the training processes that can be generated through its results.

Creation of the Advisory Group

The first step in ensuring the construction of the participatory evaluation was the creation of an advisory group of CSOs in early 2020, whose aim was to ensure that the evaluation took into account the context and interests of the social organisations. Over its more than 30 years of existence, Itaú Social has worked to promote CSOs that work from the perspective of Holistic Education with children and adolescents in various projects, and so certain criteria were used to define a group that could accompany the development of this evaluation. The first criterion was that they should work primarily with children and adolescents from an HD perspective; that they should be CSOs from different regions of the country and with different areas of activity (sports, the arts, culture or social education); and that they should have teams with experience in monitoring and evaluation.

An advisory group of 10 CSOs was created to contribute collectively by sharing experiences, critiques and suggestions throughout the project. These were organisations with different structures and areas of specialisation, spread across the country's five regions, as shown in the map and table below:



Figure 3. Civil Society Organisations participating in the Advisory Group
Source: Authors' own elaboration

Name of organisation	Area of operation	Focus of the initiative
Casa do Rio	Igapó Açu - Amazonas (AM)	Education and Culture
Vagalume Association	Amazonia (states of Pará, Amazonas, Acre, Roraima, Rondônia)	Promoting reading
Raimundo Fagner Foundation	Orós – Ceará (CE)	Education and Culture
Mato Grosso Association of Folk Expressions (AMFMT)	Várzea Grande - Mato Grosso (MT)	Culture
Queiroz Filho Brazilian Institute for Community Support Studies – IBEAC	São Paulo - São Paulo (SP)	Education
BEM TV	Niterói - Rio de Janeiro (RJ)	Education and Culture
Bola pra frente	Rio de Janeiro - Rio de Janeiro (RJ)	Sport
Bairro da Juventude (Youth neighbourhood)	Criciúma - Santa Catarina (SC)	Education and Culture
Wimbelemdom	Porto Alegre - Rio Grande do Sul (RS)	Sport
Community Centre for Culture and Development (CPCD)	Belo Horizonte – Minas Gerais (MG)	Education and Culture

Table 2. *Table of the organisations' areas of operation and activities*
Source: authors' own elaboration

Once the group had been formed, we began to discuss how the CSOs perceived the contribution of this evaluation process to the development of their activities. As the work began in 2020, the year when the Covid19 pandemic started, the meetings were virtual throughout the design and validation phase of the evaluation. The Itaú Social team was responsible for organising the agenda, materials, dynamics and the convening of meetings. The CSOs were responsible for indicating the best time, reading the materials sent

in advance, and assigning one or more members of their teams to monitor the development of the work. The organisations were not always able to keep the same person present at every meeting, which made it difficult to follow up from one meeting to the next. The frequency of the meetings depended on the progress of the work, so that we could present the group with something already systematised based on what had been decided in previous meetings. Nevertheless, Itaú Social took care not to leave too long a gap without a

meeting. At first the meetings were held monthly, but once the development of the instruments began, they became quarterly. Some smaller organisations also had technological difficulties, which led to a loss of communication during meetings. But even with these technical difficulties and asymmetries of knowledge, these exercises contributed to a shared vision among the participating organisations; different CSOs mentioned, for example, that:

[The HDE] will show the actions/results that already exist but that are not recorded or presented to society, because they are “invisible”.

(Educator from a CSO)

[The HDE] prompts organisational self-analysis.

(Educator from a CSO)

[The HDE] can provide access and opportunities in urban and rural areas based on an understanding of the realities.

(Educator from a CSO)

One of the points that the organisations made most explicit was that currently there are few metrics and indicators to help them diagnose the needs of the children and young people who take part in their projects and to demonstrate the impact of their work on the lives and development of these children. The organisations saw in the development of this work an opportunity to show their relevance to society, to governments and to potential sponsors.

However, from the start of the work, the greatest challenge we were able to observe was the inequality in knowledge about monitoring and evaluation among

the CSO teams, and the size of each organisation. Some organisations had large teams specialising in management areas and already had knowledge and practices in the field. Others were small, had a reduced team, and did not have the experience or the repertoire to discuss the best paths to follow with the evaluation. Initially, we managed to overcome this challenge with meetings that were more formative and in which the more experienced CSOs could share their experience with the smaller ones. However, as we will explain below, on occasions, these asymmetries hindered progress in the participatory construction, and we had to devise a strategy to present already-constructed proposals for the teams simply to validate.

Definition and validation of the dimensions and subdimensions of holistic development

The second step consisted of defining the dimensions of HD. This process took as its reference point the Itaú Social’s body of work in promoting holistic education, which began in 1995 with the ItaúUNICEF Award, a partnership with the UN agency and CENPEC²³. This work was presented to the Advisory Committee in a formative way, so that all the representatives of the CSOs present could level their knowledge on the subject of holistic development. We presented Itaú Social’s work in constructing HD dimensions together

²³A non-profit civil society organisation that promotes quality and equity in Brazilian public education.

with the work of the Reference Centre for Holistic Education. In this process, the participating CSOs understood that the dimensions accounted for the different work carried out and represented what was lacking in the holistic development of children and adolescents. Thus, the dimensions were validated by the group known as the Advisory Group. This dialogue with the CSOs defined the five dimensions of the HDE framework, as shown in Figure 4.

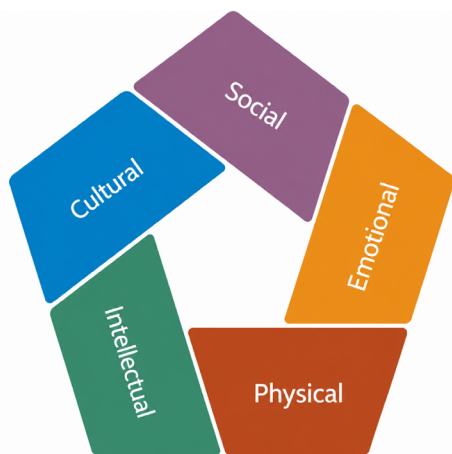


Figure 4. Dimensions of the Holistic Development Evaluation

Source: Authors' own elaboration

The physical dimension refers to the understanding of issues related to the body, self-care and healthcare, and physical and motor strength and practice. The emotional dimension refers to issues of self-knowledge, self-confidence and determination, sense

of belonging, self-esteem, emotional balance and resilience. The social dimension focuses on social and environmental awareness, the exercise of citizenship, the appreciation of diversity and coexistence, dialogue and collaboration. The intellectual dimension is associated with the acquisition of languages, codes and technologies, the exercise of logic and critical analysis, life planning, autonomy, the capacity for expression, creativity and attention. Finally, the cultural dimension refers to the appreciation and enjoyment of different cultures, questions of identity, cultural production in its different languages, and respect for different social perspectives, practices and customs.

The dimensions were worked on together with experts and CSOs in order to specify their meaning in the context of each of these organisations' work. From there, the subdimensions were developed, which until then had been a gap, as there were no reference points or existing works that specified these aspects of holistic development while taking into account the work of the social organisations. In a series of mediated virtual meetings, the CSOs assessed a list of subdimensions and descriptors generated from the HD dimensions of the Reference Centre for Holistic Education and the Movement for the Common National Curricular Base, using a scale of very relevant, relevant and not very relevant²⁴. This work was recorded collectively in a document that was also shared with the educators and technical staff of the CSOs so that they could

²⁴ The Common National Curricular Base (BNCC) is a normative document that defines the organic, progressive set of essential learning that all pupils must develop throughout the stages and modalities of basic education.

collaborate. On the basis of this joint analysis, the subdimensions were constructed together with their definitions, excluding the least relevant aspects and

adding subdimensions related to the work of the CSOs but not covered in these references. Figure 5 consolidates the subdimensions that were defined.

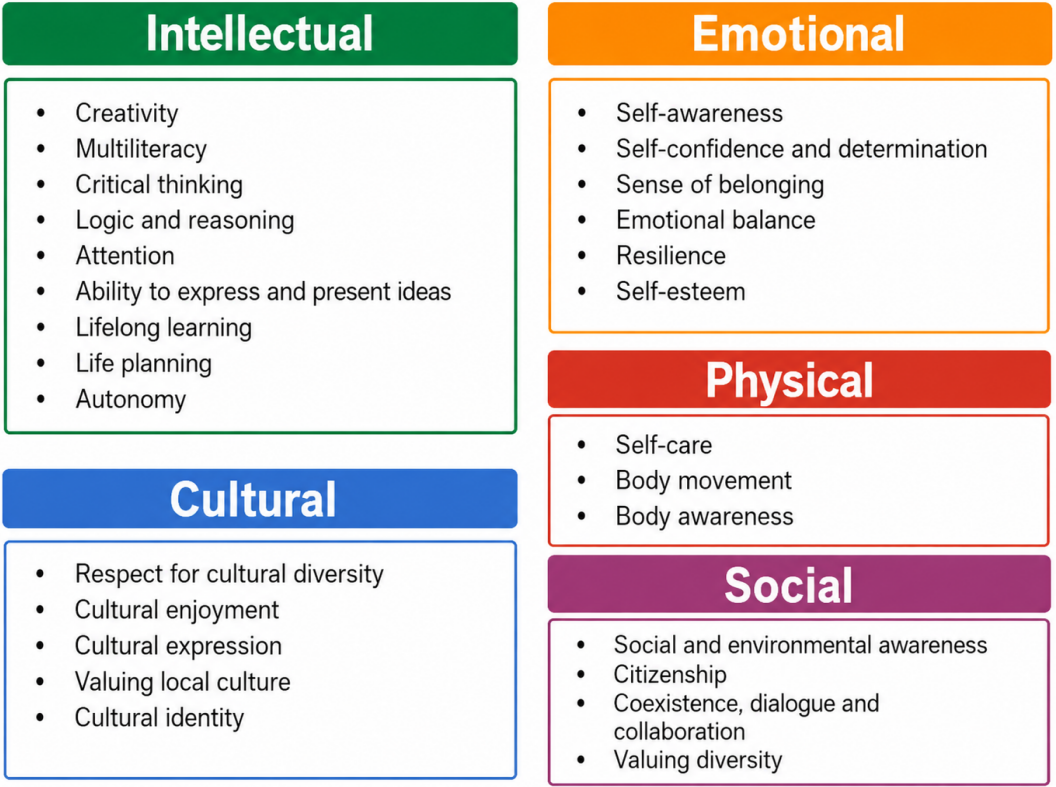


Figure 5. Subdimensions of the Holistic Development Evaluation
Source: Authors’ own elaboration

In the first half of 2021, the descriptors for each subdimension were created to bridge the gap between the subdimensions and the data-collection instruments.

At this stage, the descriptors were proposed by experts in each of the dimensions and then adapted, with the support of the CSOs, to the reality of their work.

Dimension	Subdimension	Definition	Descriptor
Physical	Body awareness	Understanding one's own body, its limits and its relationship with others and the environment.	1) Get to know your body, its needs and how it changes
			2) Recognise ways of setting boundaries regarding contact with parts of one's own body and the bodies of others, and the importance of consent
	Body movement	Development of physical skills	1) Develop your motor coordination whilst respecting your physical capacities
	Personal care	Taking care of yourself to promote your own health and wellbeing	1) Independently adopt healthy habits that promote personal wellbeing
			2) Understand the consequences of your actions on your body.

Table 3. *Example of the structuring of the Physical dimension*
Source: Authors' own elaboration

The aim of the descriptors was to identify the competencies that it was important to learn in each subdimension. The challenge at this stage was to reconcile what was expected of a child’s or adolescent’s development in each of these dimensions with the work that the CSOs actually carried out, since we could not construct a relationship that did not express a result that could be achieved through the organisations’ work. At the end of these stages of collective work, we had a framework that linked the dimensions of HD with subdimensions and descriptors.

Methodological options

Once the framework had been established, we set about creating an instrument that would allow us to

collect information on the holistic development of the children and adolescents taking part in the CSOs’ projects. To support the methodological decisions on what type of instrument to use, we compared the main reference points and methodologies for assessing the development of children and adolescents²⁵.

The first aspect we investigated was the collection methods. We analysed the pros and cons of each of the methods used, and the evidence indicated that self-

²⁵ Some of the criteria defined for selecting the development assessment methodologies to be analysed were: (a) evaluations that addressed multiple dimensions with equivalent weighting among them; (b) evaluations that were publicly available and/or validated in Spanish or Portuguese; (c) those focused on the 6-18 age range, excluding instruments for early childhood and adults. Among the selection of approaches chosen for the analyses were: the OECD, UNICEF MENA (Middle East and North Africa); the CASEL framework; the Socio-Emotional Skills Assessment of the Corona Foundation in Colombia; and 21st Century Learning, among others.

administered questionnaires —those that are answered according to the children’s own self-perception— were the most viable in terms of ease of application and greater scope for autonomous use by the CSOs, and were considered the least costly. Observation tools that can be applied by educators tend to be more costly, as they involve observing the child’s behaviour in a specific activity and over a period of time, and therefore constitute a type of methodology that requires more training and takes longer to implement.

The evidence points to higher response rates for self-reported questionnaires applied to children from the age of 10²⁶, considering that age is a crucial point when taking into account aspects of language or literacy. From there, it was decided to produce two questionnaires, one with items for children aged 10 and 11 and another for adolescents aged 12 to 18, with different degrees of complexity and related to these age groups. The proposal was drawn up and systematised by the Itaú Social team and presented to the Advisory Group, which validated it and agreed that it was a division that made sense based on the organisations’ work experience.

Another point of methodological discussion was which scale to use for answering the questionnaires. In constructing the scale, we sought to ensure that it would

be easier for children and adolescents to interpret, as well as to allow greater sensitivity in detecting changes in the indicator over time. At this point, we analysed the evidence for applying 3- and 4-point scales, and we decided to take some scale options to discuss with the children in the pretest. This was also taken to the Advisory Group, with the respective methodological justifications. However, we eventually realised that they could not validate or take part in the decision. For this reason, we decided to carry out an empirical validation, testing the questionnaires with children and adolescents.

Development of the data collection instruments

After defining the self-administered questionnaire as the collection method, we began to construct the items and/or questions related to the descriptors. An important point in this construction is that prior evidence and experience have shown that, for children to understand the items better, these should be constructed in a positive way, avoiding changing the polarity of the items or constructing items with double negatives. The proposal was to construct five questionnaires, one for each dimension, that met the following requirements: to be useful and formative for the CSOs; to be easy to communicate, understand and collect; to be self-administered and contextualised by the CSOs themselves; and to be adaptable to the work of each institution (with possible subindices).

²⁶ Evidence indicates that self-reports on personality and social and emotional skills can be used from the age of 10 (Soto *et al.*, 2008). This capacity depends on a number of critical factors, such as language proficiency, but also on cognitive and social development (De Fruyt *et al.*, 2015). Children must have acquired a certain vocabulary and a basic reading level in order to complete the assessment.

Dimension	Subdimension	Definition	Descriptor	Items
Cultural	Respect for cultural diversity	Recognises the existence and importance of different cultures and lives in a way that respects differences.	Recognises, respects and values the cultural diversity of individuals and stories, showing an interest in others and their culture.	I would like to take part in festivals and events related to cultures and religions different from my own.
				I interact with people who have a culture or beliefs different from my own
				I enjoy listening to, talking about or learning about other cultures (languages, food, customs, etc.)

Table 4. *Example of the structuring of the Cultural dimension with the list of items*
Source: Authors’ own elaboration

Bearing in mind the premises of participatory evaluation, the greatest challenge we faced at this stage was to keep the CSOs in the advisory group involved in the review of the literature, the definition of the methodologies and the creation of the questionnaire. This involved many technical aspects that the organisations did not fully understand. Initially, we tried to discuss with the Advisory Group a review of the literature on instruments already developed and on national and international experiences in collecting information through self-administered questionnaires. The educators and the organisations’ teams pointed out that it was a method they were familiar with, but they had difficulty visualising how all the dimensions, with their descriptors and items, could be asked about in a self-administered questionnaire. For this reason, we decided to draft an initial set of materials and to carry out a prior in-person trial in order to collect the suggestions of the CSO educators and of the participating children and young people.

The pretest was carried out with three CSOs from the advisory group: Bairro da Juventude (SC), Casa do Rio (AM) and AMFMT (MT). In this pretest we administered the questionnaire to 57 children and 21 educators. The organisations were selected so as to ensure the presence of different regional contexts and stages of institutional development. In addition to self-administering the questionnaire, the children and young people were asked to point out the words they did not understand, the points they disagreed with, and their perception of how they felt about answering a questionnaire of this kind. At the end of the self-administered application, we held a conversation with the children and adolescents to learn about their understanding of the questionnaire, their perceptions, and how we could improve it. The educators, for their part, evaluated each of the questionnaire items, indicating their relevance, take-up and comprehensibility, and an in-person round table was also organised for them, coordinated by the Itaú Social team, so that we could explore and talk

about their perceptions of the questionnaire. Both the questionnaire and the reflections on the topics covered were very well received, as illustrated by the testimonies of children and young people:

I had never stopped to think about how I felt when I looked at myself in the mirror.

(child's comment on an item from the self-esteem subdimension)

I think this debate about access to culture is very important. Sometimes we have the place, we have the cinema, we have the library, but we don't have access, we can't go because it is far away, because it is expensive, or because we don't even know it is there.

(comment by a young person in the pretest on an item from the cultural enjoyment subdimension)

They also pointed out that the chat was an important moment for expressing their opinions, raising questions, making suggestions and talking about what they had answered. The children's participation in the pretest made an important contribution to broadening the scope of the evaluation framework, by showing the intrinsic value of children's and young people's self-perception of their own development. There is nothing better and more legitimate than children speaking about themselves. The children and young people found value in being listened to and demonstrated that the evaluation can be a bridge for dialogue and mediation on matters of holistic development.

The educators also emphasised the formative nature of the evaluation. They were pleasantly surprised to identify topics that the children had pointed out and that needed more work on the part of the CSOs.

Children and young people want to participate, they want to feel part of the process. By opening up, they show that they want to improve, that they want to help us improve.

(CSO educator)

In light of the comments from both the children and the educators, improvements were introduced to the tool and some points of the methodology that remained open were defined. One interesting point was the adjustment to enable the instrument to be adapted to different regional contexts. In a vast country such as Brazil, the language undergoes certain variations that make comprehension difficult depending on the term used. One example was the replacement of the term *quermesse* with "regional cultural and religious festivals". In its application in the north and centre-west, it was identified that this was a term referring to Catholic religious festivals that was widely used and understood in the south and southeast of the country, but not in the rest. Another point was the way in which the sentences of the items were written. Some children found it difficult to read sentences with implicit pronouns. It was therefore easier to understand when the pronoun was highlighted. For example, instead of stating in the questionnaire "*Gosto de ler todos os dias*" [Like reading every day]²⁷, we made the pronoun very explicit in this way: *Eu gosto de ler todos os dias* [I like reading every day].

In general, children find simple words and sentence constructions easier; for example, "I am happy when I

²⁷ [Translator's note: in Portuguese, subject pronouns can be, and normally are, omitted because they are inferred from the endings of conjugated verbs.]

learn new things” is easier for them to understand than “I am happy learning new things”.

Based on the conversations with the children and adolescents, we were also able to define the response scale for the questionnaires. The scale chosen was a five-point Likert scale, also recommended in the literature for its greater sensitivity and variation over time. One child commented:

I preferred the five-point one because it gave me more options for answering the questions.
(adolescent taking the pretest)

Responses could be given in terms of the degree of agreement with the item or the degree of frequency with which the child or adolescent carried out the activity described in the item. Emoticons were also added to help the child identify the point on the scale at which they should respond.

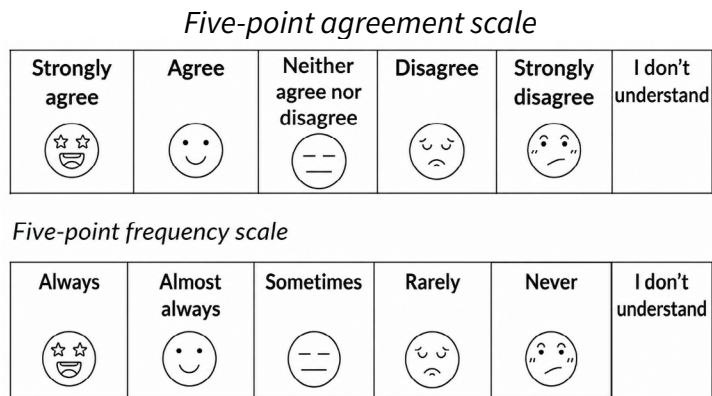


Figure 6. Scale defined for the instrument

The conversation was a memorable moment: the children and young people felt welcomed and listened to, and the educators identified opportunities for training and building closer relationships with them. Given these positive results, the process of listening to children and young people alongside the educators was definitively incorporated into the application methodology in its final version. With this feedback from the pretest, the implementation of the evaluation was finetuned in order to move to the pilot phase with all the CSOs taking part in the advisory group, so as to collect a sufficient sample to validate the methodology and the questionnaire.

At the end of this stage, the evaluation consisted of two steps: the application of six questionnaires (one for each dimension of HD and one with profile and context questions) and a subsequent roundtable discussion on the topics covered, how the children felt about answering them, and how the CSOs could work together with them on the points where they felt most uncertain.

Pilot application and results

Once the questionnaires had been adjusted and validated, we moved on to the pilot phase, in which all the CSOs in the advisory group took part. The questionnaires were anonymous, with 144 items covering the five dimensions, of which 18 were profile or context questions and 126 were statements rated on a 5point scale (frequency and agreement).

The items were not distributed equally among the dimensions because of the difference in the number of subdimensions and descriptors for each subdimension. The distribution was as set out in the following table:

Dimension	Items
Physical	13
Intellectual	37
Emotional	33
Cultural	21
Social	10
Profile and Context	18
Total	144

Table 5. *Number of items per dimension in the questionnaire*
Source: Authors’ own elaboration

Most of the CSOs applied it in printed format, but those that had the infrastructure applied it digitally using tablets and computers. The total application time ranged from one hour to one and a half hours, with the following stages:

- Collective briefing on the instrument and its completion;
- Individual completion of a questionnaire (printed or digital), with reading assistance for children and/or adolescents with difficulties;

- A brief round of conversation about the topics covered in the questionnaire and the feelings prompted by the answering it.
- In the end, we had the following number of participants in the pilot application:

Audience	Total participants	People by type of application
Children (1011)	269	Print: 170 Digital: 99
Adolescents (1214)	287	Print: 193 Digital: 94
Adolescents (1518)	191	Print: 142 Digital: 49

Table 6. *Distribution of the questionnaires by group*

In general, the children and adolescents found it easy to answer the questionnaire, although for some it gave rise to moments of reflection that were difficult to respond to, which could provoke anything from interest to aversion, as illustrated by some comments made at the round tables:

- We thought more about ourselves, about things we didn’t even know.*
(12–14 years)
- Difficult, I don’t even know who I am! There’s no need to ask about life.*
(12–14 years)

Despite this, it was most common for adolescents (provided they remained anonymous) to find it very relevant to talk about their feelings and sexuality, as raised by various items in the physical dimension. They stressed that the questionnaire and the round table were spaces in which to give their opinion, because “I feel I have nowhere to speak”. A group of adolescents were asked who they talk to about their feelings, and the answer was that they do not usually talk about it with anyone, or that they only do so with friends or with God. Both the children and the adolescents suggested that the tool should discuss mental health more extensively:

Depression is also an illness.
(10–11 years)

I have always kept it to myself, but now I have been able to let it out.
(12–14 years)

Nobody wants to know how I feel.
(15–18 years)

During the discussion groups there were also further suggestions for questions covering topics that were not explicitly indicated in the descriptors and items, such as: “Have you suffered or do you suffer from bullying at school?” “Have you ever felt uncomfortable about sharing a traumatic experience?”

Another topic that the children and adolescents believe should be discussed is their own family and relationships at home. During the debates, more questions were suggested: “Does your family treat you the way you think you deserve?”; “Does anyone in your family use any kind of drug?”; “Do you see fights at home?”; “Does anyone drink at home?” The children and adolescents also think it would be interesting to send a questionnaire to the family, but they do not believe that parents would be able to answer all the questions, especially about emotions; one question suggested in this regard was: “Do you think your daughter is happy?”

I never talk about my whole day, I only talk about things that I know won't be a problem, what I already know.
(12–14 years)

To systematise the data, it was decided not to create summary indicators at that point. The data were organised descriptively by item, descriptor, subdimension and dimension, quantifying the percentage of children who answered *strongly agree*, *agree*, *neither agree nor disagree*, *disagree*, and *do not understand*. As all the items were worded positively, the higher the proportion of *strongly agree*, the more favourable the assessment of the dimension.

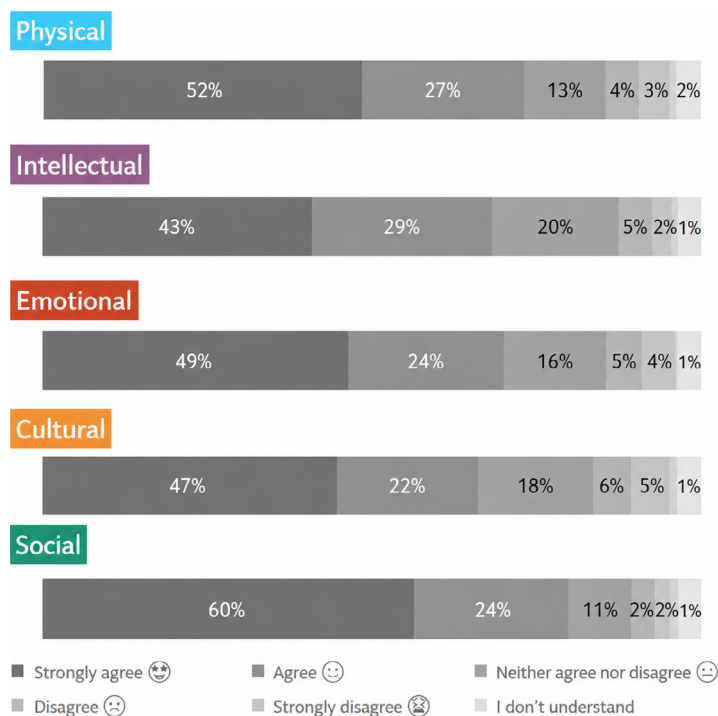


Figure 7. Distribution of pilot responses by dimension

The Social dimension is the one that obtains the best results (the highest percentage of strong agreement responses and the lowest disagreement). On average, 6 out of every 10 children and adolescents strongly agree with the items in this dimension. Among the subdimensions, the *appreciation of diversity* was the best rated, while *social and environmental awareness* is the 2nd subdimension with the most positive self-assessments and very little disagreement. Likewise, *Coexistence, dialogue and collaboration* is a subdimension

that scores highly among children and adolescents. In this dimension, the *Citizenship* subdimension appears to be the most self-critical topic and the one with the lowest percentage of *strongly agree*, suggesting that this is a priority issue for the CSOs.

As the **Social dimension** is always the last to be addressed, it ends up being the one that children reach when they are already tired. But, despite this, they find the topics covered interesting and, in general, easy to answer. In the conversation circles, the discussion around this dimension focuses on the question of rights, which are sometimes in the back of their minds and at other times mentioned immediately, in the words of some adolescents: “It’s the ECA²⁸, isn’t it?”.

The **Physical dimension** is the second best rated, with more than half of respondents in strong agreement. Among the subdimensions, *Self-care* is the worst rated, as children and adolescents are more critical of their own habits, especially older adolescents. *Body awareness*, although better assessed, shows how much remains to be done regarding knowledge of one’s own body and its transformations, especially among children.

Adolescents from some civil society organisations tended to consider the physical dimension somewhat invasive. Some found it difficult to think about their own body and found it strange to think of sleep quality

28 In Brazil, the Statute of the Child and Adolescent (ECA) is the body of rules within the legal system that aims to protect the rights of children and adolescents, applying measures and issuing referrals to the judge. It is the legal and normative framework for the human rights of children and adolescents.

as a dimension of their development. It is common for them to go to bed late and get up early because of school. Children do not easily understand the term *physical integrity*. The adolescents suggested changing it to *a situation that harms me*. The question about touching the body without permission caused a great deal of discomfort. Among the questions suggested for the block is: *Have you suffered abuse?*

The **Emotional dimension** has a high proportion of *strongly agree*, but also a high proportion of *disagreement*. Of the 5 dimensions assessed by the HDE, the emotional one is the 3rd with the best results, but it also gives rise to a great deal of self-criticism among children and adolescents.

Among the subdimensions, *emotional balance* is the topic that requires the most attention from the CSOs, as it is the one that receives the most negative responses. On the other hand, *Resilience* and *Self-awareness* tend to be well rated. Many of the topics covered indicate that the transition from childhood to adolescence has an impact on self-criticism: adolescents end up losing the confidence, self-esteem and emotional balance that they may have had as children. This points to a challenge for the CSOs in supporting adolescents to maintain these feelings and a more positive vision of themselves.

The **Intellectual dimension** has the lowest proportion of *strongly agree* among the 5 assessed by the HDE; that is, it is a topic that arouses the most self-criticism among children and adolescents. Among the subdimensions, *Life planning* and *Lifelong learning* are

the ones that obtain the best results, while the *Capacity to express and put forward ideas* is where they are most self-critical. Although the HDE does not use cognitive tests to accurately assess performance in these areas, it is possible to identify that there is ample scope for the CSOs to act in this field, especially in relation to the organisation of routines and ideas, argumentation, and the creation of causal relationships, among others.

At the round tables, the adolescents were asked about their dreams. Comments about not having dreams or long-term goals were common, but often they were simply embarrassed to share them.

It is easier to talk about problems than about dreams.
(15–18 years)

The **Cultural dimension** is the one that obtains the worst results, with the highest proportion of disagreement. On average, 1 out of every 10 children and adolescents has a critical opinion (*strongly or partly disagree*) of their own knowledge or practices. Among the subdimensions, the assessments by children and adolescents are relatively homogeneous. All age groups obtained better results in the area of *cultural enjoyment*. And the question of *cultural identity* is the one in which self-criticism is most evident, revealing a lack of knowledge of origins and a sense of belonging.

In general, we can see difficulties in communication, relationships with families, and the capacity to express feelings and ideas across all dimensions. On the one hand, we do not expect these issues to be resolved, given that these are children and adolescents in the

midst of a developmental phase, with the anxieties and questions typical of their age. On the other hand, the questionnaire indicates priority situations in which the CSOs can intervene, collaborating with schools, families and the public childcare network, in order to help children and adolescents to develop in a healthy way, without allowing the anxieties of their age to turn into more serious relationship and mental health problems. This is why we believe that, rather than an evaluation, the questionnaire and the round table are instruments that allow children and adolescents to express themselves on topics that they do not feel comfortable talking about on a daily basis.

To inform the CSOs of the results identified, the Itaú Social team held meetings with each organisation, presenting the overall results by dimension. As well as being built in a participatory way, the evaluation was intended to be formative. The results were presented in individual meetings with each CSO, with the participation of the organisation's educators and managers on the basis of the respective data from the implementation at that CSO. In this way, the educators were able to reflect on the responses of the participating children and adolescents and to think about how they would address these points in their respective organisations.

Lessons learned and challenges for the future

Evaluating holistic development is a complex and difficult task. Any questionnaire or index that can be used in an evaluation of this kind has limitations, since they are simplifications of reality. However, this does not mean that they are not important for the strengthening of CSOs, since they establish parameters that shed light on the aspects of their work that are most advanced, as well as on the points that need more support and improvement.

The main value of an evaluation tool such as this is not that it allows us to ascertain the degree of holistic development of children and adolescents, but rather that it enables a space for children and adolescents to be heard, since in the educational context they are the stakeholders whose participation is least called upon in the planning and implementation of social projects and public policies.

We also understand that the importance of the participatory construction process lies in training. The formative approach is fundamental to ensuring reflection and the use of the evaluation in order to identify priority topics and improve the actions and pedagogical practices that are most in line with the needs and with the effective promotion of the holistic development of children, adolescents and young people.

Each stage of the development of the evaluation provided learning about how to ensure genuine

participation that adheres to the principles of participatory evaluations. It was important in the process that the evaluators, mediators, experts and CSOs worked together on the stages and forms of participation, since there is no manual and these processes were not so obvious to any of the parties involved. For this reason, the participation of the CSOs and of the children and adolescents was not homogeneous throughout the process. In line with the work of Vaughn and Jacquez (2020), we can identify that the CSOs were involved in different ways at each stage of the process of building this evaluation, ranging from being informed to being involved.

Given the diversity of existing perspectives, it was not always easy to ensure the balance of power and the reception of contributions. In general, the organisations saw in Itaú Social a reference point and authority on monitoring and evaluation methodologies. They also saw that Itaú Social, as coordinator and funder of the evaluation, would be the leader in that process. With this, it was a challenge to maintain this balance of power and to establish the CSOs as empowered members and active participants in the process. A process of openness and flexibility was required, on the part both of Itaú Social and of the social organisations, respecting the process of going back and forth. The challenge was very rich, given the opportunities for interaction, the review of options, discussions, changes of course and the broadening of perspectives on holistic development.

An important lesson was that, for a participatory process, it is important for the actors involved to go

through a formative moment: for everyone to share the same knowledge base, as the basis for communication on a more equal footing. Of course, when stakeholders with such asymmetric knowledge are involved, it is not possible for everyone to know exactly the same, but at least a common base is necessary. It is also important to ensure that the meetings do not take place over too long a period and that the stakeholders are kept informed, even when there is no need for meetings, so that they do not lose their connection and commitment to the development of the evaluation.

Finally, it is necessary to consider the importance of developing simple instruments that can be implemented without much cost and that produce results that are easy to assess, so that the evaluation fulfils its role of enabling organisations to understand their context and to be able to make decisions with the aim of improving their practices and projects.

Recognising the natural complexity of the subject and of the process without becoming discouraged in the face of the challenges allowed us to take important steps with what was feasible at each moment, without waiting for perfect methodologies. The exchanges with the participants contributed far more to clarifying questions and untangling knots than the isolated effort of conducting literature reviews or sophisticated statistical models. By valuing this multiplicity of knowledge and experiences of CSOs, educators, children, adolescents and young people throughout the process, we enrich the perspective of holistic development and the uses of its evaluation.

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