

GoodWeave



GoodWeave International

**Global Indicators 2013-2014
Outcome Evaluation
Summary Report**

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Introduction and Background

GoodWeave is an international organization working to stop child labor in the carpet industry and to replicate its market-based approach in other sectors. GoodWeave fulfills its mission by creating market demand for certified child-labor-free rugs, monitoring supply chains, rescuing and educating child laborers, and providing critical services for weaving families.

GoodWeave maintains a Monitoring and Evaluation (M&E) program to measure ongoing progress against organizational objectives and impacts and uses this information to adjust program strategies. GoodWeave's M&E System Report available publicly online¹ describes the M&E system, including the theory of change, results framework and global indicators. As part of the M&E program, GoodWeave routinely collects data from offices in consumer and producer countries on this set of global indicators. This present report summarizes the analysis and outcome-level evaluation of the global indicators data collected in 2013-2014.

GoodWeave is continuously developing its M&E system to better measure long-term impacts. GoodWeave believes that the greatest impact of its work is one that has always proven challenging to quantify – namely the deterrent effect that results from engaging and working with brands and companies to map their supply chains, identify and root out child labor in the industry using the system of rigorous child labor inspections. GoodWeave's review of a range of external research studies suggests that child labor in the South Asian carpet sector has significantly reduced over the past two decades from an estimated one million to 250,000. As these trends that are both expansive and occur over a long time horizon are difficult to measure and attribute through GoodWeave's existing M&E system, the organization is actively seeking support and expertise to better track and understand the true impact of this deterrent effect.

¹ See <http://www.goodweave.org/about/governance/monitoring-and-evaluation>.

Evaluation Framework

This evaluation addresses a set of questions stemming from GoodWeave's theory of change and results framework, which are summarized below and in Appendix 1.

Vision - GoodWeave envisions a day when no child is made to work instead of going to school, and when freedom and access to education are guaranteed. By creating a market that demands these things, human rights will be essential and intrinsic, first in the rug industry and then in all manufacturing where labor abuses now exist.

Mission - GoodWeave aims to stop child labor in the carpet industry and to replicate its market-based approach in other sectors.

Theory of Change - GoodWeave believes that if enough people choose one product over another because it was made without child labor, then retailers, importers and exporters will demand child-labor-free goods from their manufacturers. This in turn will create a "tipping point" in the market, leading to the end of child labor.

The evaluation questions considered in this report examine whether GoodWeave's program strategies are contributing to the intended change described in the results framework. The scope of this evaluation includes four primary objectives and their related intermediate objectives (also sometimes referred to as short-term and medium-term outcomes) described in GoodWeave's M&E System Report.

Evaluation Questions

- **Objective 1:** Grow Market Preference for Certified Child Labor-Free Carpets
 - *Is market share increasing?*
 - *Is industry engagement increasing?*
 - *Is consumer awareness increasing?*
- **Objective 2:** Develop More Child-Labor-Free Supply Chains
 - *Is the number of child-labor-free supply chains increasing?*
 - *Is the system of inspection, monitoring and certification effective?*
 - *Are adult workers aware of their rights? Are working conditions improved?*
 - *Are producers making improvements to comply with the expanded standard?*
- **Objective 3:** Provide Alternative Opportunities for Children in Weaving Communities
 - *Are more children accessing education opportunities?*
 - *Are rescued child laborers receiving necessary services?*
 - *Are the educational opportunities in weaving communities increasing?*
 - *Are awareness and change in attitudes towards prioritizing education over child labor increasing?*
- **Objective 4:** Promote Replication of the GoodWeave Model in New Industries
 - *Have additional sectors for replication been identified, evaluated and piloted? Is the brick pilot program in Nepal on track?*

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The scope of this evaluation report does not include Objective 5: Strengthen international operations and governance structures, which is a supporting objective. This evaluation report also does not seek to answer the overarching question of whether and how GoodWeave's programs are contributing to the long-term goal of eliminating child labor in the carpet industry, because this would require a broader impact evaluation looking at additional data over a longer time period and using research methods beyond the scope of the available global indicators data.

The methods used to collect and analyze data for this report are described in Appendix 2. The targets against which success is measured for the various indicators are expressed in terms of increases over previous years, rather than numerical targets. These are measured in terms of 2014 results against a 2013 baseline for most of the indicators, except for a few where data over a longer time horizon is available.

Where data limitations made it difficult to draw conclusions, additional indicators, data and/or methods for assessing the program outcomes and impacts will be needed to supplement the current global indicators data in the future.

Summary of Results

Objective 1: Grow Market Preference for Certified Child Labor-Free Carpets

The market share of GoodWeave certified carpets remained stable throughout a period of industry decline in the global market, which began in 2007. Gains in the US market share have been maintained in recent years but this has not been matched in key European markets, particularly Germany. Consumer trends shifting towards lower price products may have a significant effect, as GoodWeave has historically had more licensees in the higher-price point category. This trend is expected to change in the coming year with the addition of two significant retail brands that signed as licensees in 2014, which are likely to have a significant effect in boosting GoodWeave's market share.

Industry engagement: More companies continue to join GoodWeave every year, indicating sustained growth in industry engagement. GoodWeave has also engaged new markets globally, and between 2013 and 2014 the number of licensed exporters increased in both India and Afghanistan.

Consumer awareness: Global consumer reach also experienced a sharp upswing in 2014, driven by increased media exposure, particularly online editorial coverage and heightened media attention to the Nobel Prize awarded to GoodWeave's founder Kailash Satyarthi. However, consumer reach through advertising and co-branding declined as the campaign switched focus towards more of a social media presence.

	2013	2014
Total market size (HTS 570110 in USD, millions)	\$ 377.1	\$ 402.1
US	\$254.6	\$287.9
Germany	\$104.7	\$96.3
UK	\$17.8	\$17.9
India	\$153.7	\$170.3
Nepal	\$45.3	\$42.0
Value of certified carpet imports (USD, millions)	\$ 21.0	\$ 20.1
US	\$11.9	\$11.9
Germany	\$4.9	\$4.3
UK	\$4.4	\$4.9
India	\$7.7	\$7.3
Nepal	\$7.8	\$7.4
Market share (as % of total market size in USD)	5.6%	5.2%
US	4.6%	4.1%
Germany	4.7%	4.5%
UK	24.5%	27.5%
India	5.0%	4.3%
Nepal	17.2%	17.7%

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Volume of certified carpet imports (sq. meters)	381,918	439,571
India	312,059	370,738
Nepal	69,859	68,833
Number of carpets certified	141,376	144,194
India	12,356	13,465
Nepal	128,849	130,672
Number of importer licensees	130	137
Number of consumer countries where GoodWeave works (signed licensees)	13	14
Number of GoodWeave exporter licensees	160	166
India	78	73
Nepal	81	91
Afghanistan	1	2
Number of consumers reached through marketing campaign (millions)	61.1	108.2
Ad readership/reach (millions)	23.7	21.4
Press editorial readership (millions)	37.2	86.6
Unique website visitors (thousands)	222.5	209.9
Number of partner co-op ads placed	8	3
Number of GoodWeave PSAs placed	45	35
Number of licensees co-branding with GoodWeave	53	38

Objective 2: Develop More Child-Labor-Free Supply Chains

GoodWeave's access to supply chains and coverage of the industry in producer countries is increasing. Key indicators show the number of production sites, looms and weavers in the monitored supply chains of GoodWeave licensees are all on an upward trajectory. This growth is due to new licensees entering the system. During this time the number of production sites with child labor found also increased – particularly in Afghanistan where GoodWeave had the greatest number of new production sites inspected, primarily home looms. The country with the lowest incidence of child labor found both in absolute terms and relative to the size of the supply chains inspected was India, showing a reduction in child labor incidence over time in the countries where GoodWeave has been working the longest.

Effective inspection and monitoring: The system of supply chain inspection and monitoring follows international best practices as outlined by the International Social and Environmental Accreditation and Labeling (ISEAL) Alliance and employs a high frequency of on-site inspections. Expansion into new geographic areas and additional standard criteria will require additional resources in order to maintain this level of rigor.

Labor rights and working conditions: GoodWeave expanded programs in factories and supply chains to support workers' rights and improved working conditions in all countries in 2014. The number of individuals reached through programs including worker rights awareness programs, health clinics, vision testing and weaver training increased significantly.

Licensees' capacity and compliance: GoodWeave has begun the initial phases of introducing its expanded standard, however the timeline has been extended and thus development of additional indicators related to licensees' compliance status and data collection are still in process. In the coming year producers' progress in making changes to meet the expanded standard will be assessed.

	2013	2014
Total number of production sites	1,921	2,650
India	1,285	1,865
Nepal	526	519
Afghanistan	110	266
Total number of looms	18,736	22,281
India	14,327	18,471
Nepal	4,284	3,512
Afghanistan	125	298
Total number of workers	34,817	39,051
India	21,325	27,791
Nepal	13,049	10,243
Afghanistan	443	1,017

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Number of production sites with child labor found	77	220
India	13	8
Nepal	36	23
Afghanistan	28	189
Number of inspections carried out	2,568	4,150
India	1,277	1,427
Nepal	1,126	2,273
Afghanistan	165	450
Number of educational workshops / awareness programs for workers	2	13
Number of workers reached by educational workshops / awareness programs	406	2,079
Number of health & vision clinics conducted	3	6
Workers reached by health & vision clinics	396	1,155
Children served by health clinics conducted	150	450
Number of workers' vision tested	249	714
Number of weaver training programs	2	3
Number of weavers trained	50	410

Objective 3: Provide Alternative Opportunities for Children in Weaving Communities

In 2014 GoodWeave expanded access to educational opportunities for children in weaving communities in all three producer countries. The expansion was achieved through a range of services including enrolling rescued child laborers in a rehabilitation center, enrolling children in local schools in the community, boarding schools, daycare, non-formal education (NFE) centers and extracurricular classes. Comparing trends across the three countries suggests GoodWeave is closer to achieving its goal of eliminating child labor from the carpet industry in India. Programs in India have been in place the longest, the number of identified child laborers is lower, and program strategies are increasingly focused on preventative activities, such as the child-friendly communities approach. On the other end of the spectrum, GoodWeave's program in Afghanistan was the most recently established and is still in the early stages of progressing towards the goal of reducing and ultimately eliminating child labor from the industry. Thus the focus of educational programs in Afghanistan continues to be on identifying appropriate educational opportunities for children from weaving families, such as home schooling or extracurricular classes to extend the school day.

Services for Rescued Children: GoodWeave continues to provide rehabilitation and remediation services to rescued child laborers. In the last year Nepal had the highest number of children rescued or withdrawn from child labor and enrolled in rehabilitation programs, while Afghanistan had the highest increase and also the highest number of child laborers enrolled relative to the size of supply chains inspected.

Education Services in Weaving Communities: GoodWeave expanded preventative education programs into new communities, driving an increase in the number of children enrolled in the past year. This expansion includes children reached through sponsored education programs, NFE, Motivation and Learning Centers (MLCs), extracurricular classes and daycare programs.

Awareness and attitudes towards child labor: Expansion of the child friendly communities approach in India led to a sharp increase in the number of individuals reached through awareness programs held in weaving communities. In Afghanistan, anecdotal evidence suggests a change in attitudes about child labor is beginning to occur among participating weaving families as a result of GoodWeave's programs, which is an area that would be useful for further study.

	2013	2014
Total Number of children educated	2,345	2,567
India	1,516	1,528
Nepal	745	785
Afghanistan	84	254
Number of children rescued/withdrawn from looms	45	63
India	12	8
Nepal	27	29
Afghanistan	6	26

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Number of rescued children currently enrolled in rehabilitation and education programs	126	168
India	20	24
Nepal	97	105
Afghanistan	9	39
Number of children reached with preventative education and health support programs	938	1,221
India	516	614
Nepal	393	410
Afghanistan	29	197
Number of children in sponsored education programs (SEP)	238	231
Number of children enrolled in extracurricular classes and motivation and learning centers (MLC)	1,496	1,649
Number of children enrolled in daycare	477	533
Number of educational workshops/awareness programs held in communities	12	24
Number of individuals reached by educational/awareness programs held in communities	210	1148

Objective 4: Promote Replication of the GoodWeave Model in New Industries

In 2013 GoodWeave joined an initiative known as Better Brick Nepal (BBN) in collaboration with other partner organizations. As part of this initiative, GoodWeave led the development of a labor standard that is designed to eliminate child, forced and bonded labor in Nepal's brick industry. Initial pilot assessments were completed in five kilns against a draft standard. The results of these assessments then fed into the process of developing a five principle standard addressing child, forced and bonded labor, as well as working conditions on Nepal's brick kilns. A multi-stakeholder standard development process was launched in 2014, including extensive public consultations on the draft standard leading to a revised and nearly completed draft by the end of the year. A verification methodology, audit tools and corrective action process were developed and refined for use in the second round of pilot audits taking place in early 2015. GoodWeave is also in the early stages of identifying and evaluating additional sectors for replication including garments and handicrafts in 2015.

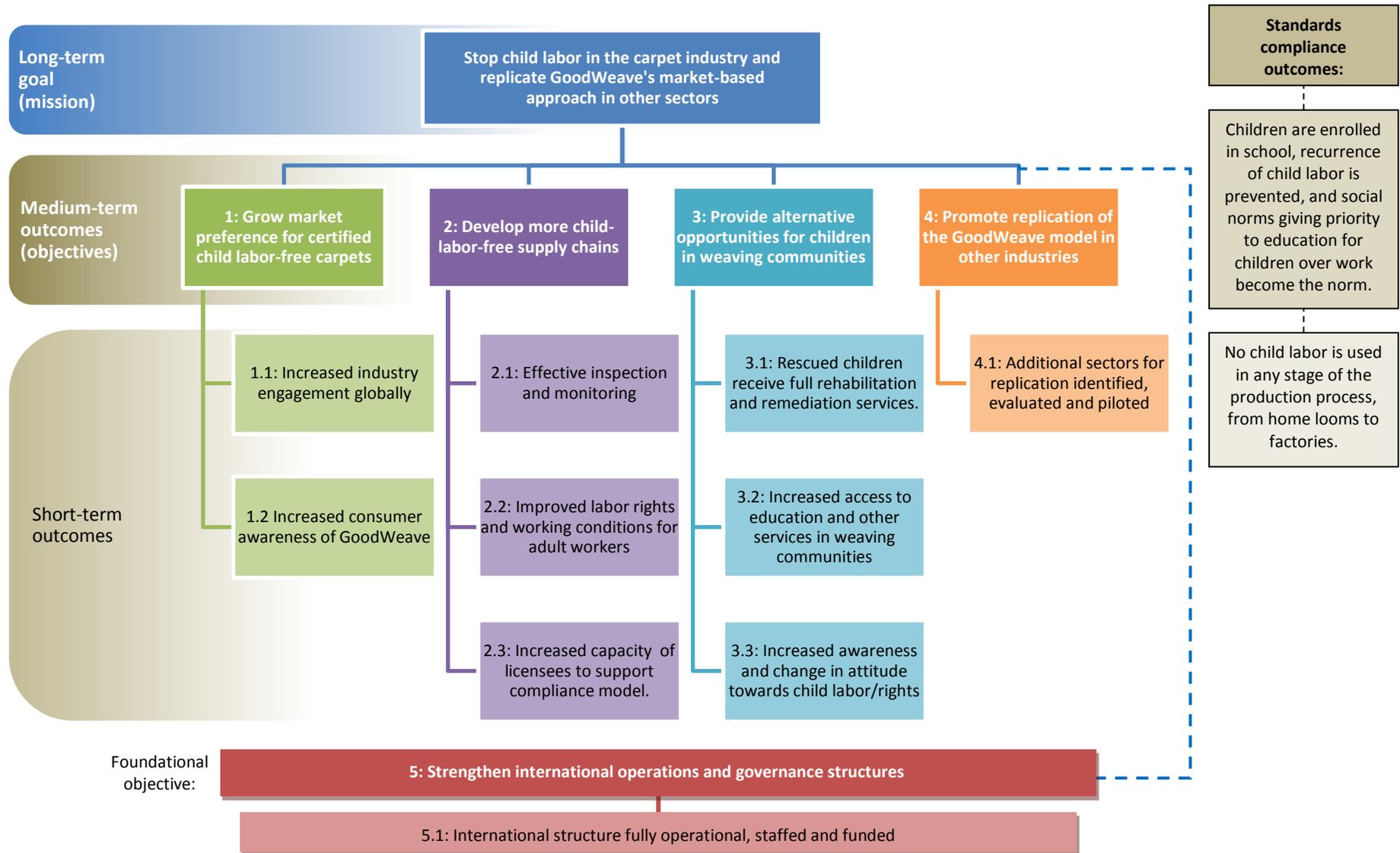
Conclusion and Next Steps

The 2013-2014 global indicators show that GoodWeave is making progress towards many of the objectives and intended outcomes outlined in the strategic framework. Although industry engagement and expanded coverage of supply chains in producer countries has increased in recent years, these positive trends have not led to overall growth in GoodWeave's market share. On the other hand, education and other support and preventative programs continue to reach more children and families in weaving families each year. While many of the indicators measure outputs, additional research and resources are needed to better measure the deterrent effect of GoodWeave's inspections system, the broader impact in terms of reducing child labor in the industry overall as well as shifts in awareness and attitudes both in weaving communities and among consumers. Some possible actions and next steps to explore further resulting from this evaluation are as follows:

- 1) Review whether the current market share calculation is an accurate indicator for GoodWeave's impact in the market (considering the changes in consumer trends the current calculation might not best reflect the relevant product categories).
- 2) Periodically update the public service advertising campaign to ensure that it remains fresh and engaging with respect to GoodWeave's media and industry partners.
- 3) Assess staffing resources in each consumer and producer country to ensure there are enough resources in place to drive industry and media engagement, as well as inspection team personnel needed to maintain the high frequency of supply chain inspections as the expanded standard and pilots in new product categories are rolled out.
- 4) Commission an independent assessment of the inspection system against the recently updated ISEAL Assurance Code and ISO 17065.
- 5) Develop a process to document and share the successes and impacts of new social program strategies in weaving communities in each country across each of GoodWeave's field teams to facilitate replication of effective programs (such as the child-friendly communities approach in India and planned activities supporting producers in implementing the expanded standard).
- 6) When the expanded standard is rolled out, define data points to be extracted from audit reports relating to the broader worker rights and working conditions principles, as well as a process for consolidating and aggregating this data so that it can be analyzed and used to inform program strategies supporting producer compliance.
- 7) Commission at least one new external evaluation of one or more of the country programs. Additional research could cover areas that require data and research methods outside the scope of routine monitoring of outputs (e.g. this could include looking at shifts in awareness and attitudes, or at what factors are hampering or contributing to the success of GoodWeave's programs).

Appendix 1 – GoodWeave Results Framework Schematic

(from M&E Public System Report updated February 2015)



Appendix 2 – Data Collection & Analysis Methods

GoodWeave collects M&E data from consumer and producer country offices on a regular basis. This includes the following:

- Consumer country licensing & market data (including market size, volume and value of imports, number of licensees and number of countries where GoodWeave works) – The source of the data is from Global Trade Information Services (GTIS) trade data and GoodWeave’s licensing data, which is tracked, collected and analyzed on an ongoing basis by licensing team in the head office. The data is aggregated using Excel files and reports generated typically at least once per year and provided to the M&E team.
- Consumer country media & communications data (including number of consumer reached through various media channels, advertising and GoodWeave website) – The source of this data is from a media tracking company and Google Analytics, which is tracked, collected and analyzed monthly by the media/communications team in the head office. The data is aggregated using Excel files and reports generated typically every month and provided to the M&E team.
- Producer country market & social programs data (including exports of certified carpets in USD, square meters and number of carpets certified, number of exporter licensees, number of awareness programs, health, training, and education programs, beneficiaries reached including children educated, aggregated by type of program) – The source of this data is from the local offices and implementation partners running the programs. The information is tracked, collected and data filled out on a reporting spreadsheet monthly/quarterly depending on the data points, and reported to the M&E team.
- Inspections data (including number of production sites, looms, workers/weavers, child labor non-compliances found, and number of inspections) – The source of this data is the inspections database and Excel summary reports generated by the country inspection units. Inspections data is entered and synchronized on a weekly basis, and summary reports are prepared monthly, or whenever new licensees apply and non-compliance cases are found. For inspection units that do not have a local database that synchronizes automatically with the head office, the inspections data is submitted along with the social programs data mentioned above. The M&E team extracts the data from the inspections database and summary reports as needed.
- Audit data (including compliance status of producers against the expanded standard) – This information is recorded on the audit reports, which the local inspection units maintain and store copies on a shared intranet. Preliminary analysis of the findings from a sample of audit reports was done in 2014, however the data has not been analyzed systematically as a whole.

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- Child labor data (including number of children rescued/withdrawn from child labor and enrolled in rehabilitation programs) – This is recorded and tracked by the local child protection or social programs teams and reported to the M&E team on an ongoing basis whenever child labor cases are identified.
- Better Bricks Nepal program data (including status against project milestones and pilot assessments completed) – This information is tracked by the new sector team.

Once the M&E data has been collected, it is saved in Excel files on the office shared drive and reviewed by the M&E team normally on a monthly basis. The global indicators data for 2013-2014 as well as additional historical data, where available, was compiled and organized according to GoodWeave's strategic framework to identify trends from one year to the next under each of the objectives and intermediate outcomes. The indicators were then analyzed by the M&E team and this analysis is presented in Section III of this report using charts and graphs to visualize the data trends.