



A Comprehensive Analysis of the Planning Assessment Reporting and Learning (PARL) Tool: A Systemic Approach to Grantmaking at the ECF

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Abstract

This article presents a comprehensive analysis of the Planning Assessment Reporting and Learning (PARL) Tool, a technical system designed at the European Climate Foundation to assist programmes in making informed decisions on the distribution of grants to grantees. By examining its key features, implementation, and potential impact on the grantmaking process, this study aims to highlight the value of PARL as a high-value copyrighted material for the ECF during the last 9 years, and gives some thoughts on what the future of strategic planning and learning in climate change philanthropy could look like.

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I. Introduction

A. Background on the European Climate Foundation and strategic grantmaker role

The European Climate Foundation (ECF) is a major philanthropic initiative working to foster the transition to a net-zero society to ensure a healthy planet and sustainable living conditions for current and future generations. The ECF is a non-partisan organisation that currently lends support to a network of 1000+ organisations working at national, European and global levels to activate public and political engagement and shape policymaking in response to the climate crisis.

To execute its mission, the ECF embodies four core roles. As a **strategic grantmaker**, it provides funding to a broad range of organisations, ensuring diverse ventures and perspectives while helping grantees build their capacity and capabilities. As a **thought leader**, it facilitates the growth of collective influence by coordinating across the climate movement and providing an innovative space to co-develop strategy. As a **network enabler**, it uses its credibility to bring together key actors and spark cooperation among philanthropic partners of climate action. And as a **narrative shaper**, it creates and fosters public and political messaging around the transition to a net-zero society.

As indicated above, one of the four ECF roles is being a strategic grantmaker: through its sector and country programmes, it funds a broad network of organisations to ensure that a variety of interventions are aligned towards a common programmatic goal or strategy. Strategic alignment does not come by itself. Strong processes and tools are necessary to ensure it is happening in a thoughtful, collaborative and effective way. And strategic planning is just the first step: monitoring the impact of the strategy, and adjusting the strategy during the journey, based on the learning gained during the course of the exercise, is as important in order to achieve the desired objective.

B. Background on the role of technology in grantmaking

Philanthropies often lack tools to help bridge the gap between high level programme strategies and individual grant decisions. There exists a growing grantmaking software industry, and philanthropies increasingly move to the digital space, building their IT strategy to support their mission for the next years, but still it is hard to find real strategic planning and monitoring tool, allowing to capture theory of change and theory of activities in a visual way, connected to a database, while offering monitoring

and collaborative features. The majority of existing systems allow traffic light at grant or workstream or strategy levels, but without showing the strategic connections between grants and outcomes. It was even more the case back in 2013 when the ECF had taken the decision to develop its first Monitoring Evaluation and Learning framework (MEL).

C. Objective of the article: Exploring the PARL Tool and its systemic approach to grantmaking

The ECF has created its own strategic planning and monitoring system in 2013 – PARL (for **P**lanning **A**ssessment **R**eporting and **L**earning). It has been used by all its programmes since then. The objective of the article is to describe the genesis of the system, how it works, what it has brought at the ECF and its ecosystem, and what are the next steps of developments for such system.

II. The Planning Assessment Reporting and Learning (PARL) Tool

A. PARL genesis

1. Needs

The PARL genesis starts with a need identified back in 2012. The need for an organisation like the ECF to demonstrate it uses appropriate framework and tools for planning and monitoring its programmatic strategies.

Policymaking and funding are increasingly influenced by evidence-based programming and research. Without concrete evidence that something works, it is highly unlikely that advocacy can successfully influence decision-making or secure necessary funding. Thus, an essential component of planning an advocacy campaign or a programme strategy is to create a monitoring and evaluation (M&E) system to measure progress at every step of the way—and to use the results of that monitoring to inform and strengthen the ongoing advocacy.

Integrating M&E into a broader Impacts Planning, Assessment, Reporting and Learning framework would help the ECF learn in real time what is working or not working, and make the necessary course corrections to maximize its programme or campaign success.

Until 2013, each ECF programme had its own way to present its theory of change and its own tools to monitor progress against its objectives and outcomes. It was recognised that programmes worked too much in silos and there was a need for a cross cutting strategy and cross programme collaboration. This resulted in a number of changes and new developments including:

- A new way of setting up the ECF strategy using cross cutting initiatives
- The adoption of one organisational theory of change logic model/framework
- The creation of a single system (PARL) used by all programmes to facilitate improved reporting, accountability and learning
- This new system would encompass a method and process to elaborate strategy/tactics/grants identification that is based on context analysis and respond to clear objectives
- A process to monitor and review if it is on track towards its mission and objectives, and to learn and adapt strategy based on evidence (quantitative and qualitative data and insights). Monitoring and review had to be based both on quantitative and qualitative processes.

During the definition of the requirements for the future system, it was decided that the system should.

- Enable sharing and learning from the experiences of multiple partners to maximize ECF's impact
- Help establish reporting instruments to facilitate the monitoring of the progress and ensure the effectiveness of ECF's advocacy efforts
- Create space for course-correction based on new obstacles and opportunities

- Allow the generation of data, information, and materials that will demonstrate the degree to which the ECF has achieved its desired advocacy outcomes.

2. Research & process leading to the creation of PARL

The process leading to the creation of PARL followed two main steps:

1/ Research

An important work of literature review happened in 2012 and 2013 to get an understanding of the existing landscape and trends in the philanthropic sector around systems used for strategic planning and monitoring. ECF staff participated to several workshops and meetings with philanthropies working in the sector (OAK foundation, Children Investment Fund Foundation, William and Flora Hewlett Foundation, The Energy Foundation, The ClimateWorks Foundation, a.o.), and with some organisations developing grantmaking software for the sector (FLUXX, Salesforce).

This research project had the following outcomes:

- The decision to use the "[Smartchart method](#)", created by Spitfire Strategies, as a basis for the creation of programmatic strategies.
- The decision to use a simple logic model to represent the *Theory of Change* and the *Theory of Action* of each programmatic strategy
- The decision to develop a graphical interface and a database for allowing data analysis and reporting capabilities.

2/ Internal process

The research project led to an iterative process inside the ECF to ensure there was a clear understanding on the need for such system, and that the developed solution would be seen as useful by the programmes, who would be the main users of the system. The main steps were the following ones:

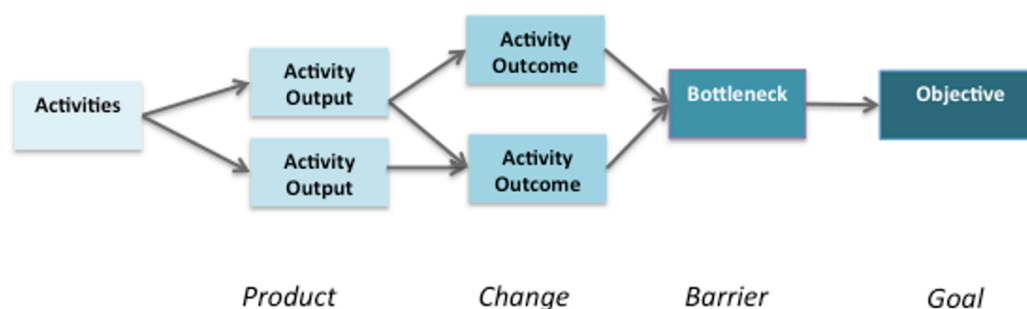
- A series of internal workshops to explain the concept and what it would bring to the ECF programmes and grantees
- Starting to create prototypes of the tool with a few programmes to test some of the assumptions of the logic model and how to apply it to the existing programme strategies
- The development of the system: definition of the database structure and incremental development of the graphical interface allowing the visualization of the *Theory of Change* and the *Theory of Action* of a programme (cf Annex 1).

B. Overview of the PARL Tool

1. The PARL Tree

The Planning Assessment Reporting and Learning (PARL) Tool is an application built on a secured web platform. PARL helps documenting Strategic Programmatic Objectives with a simple logic model graphical depiction, from the contribution of a grant to the achievement of the objective.

Logic Model



It then helps assessing progress against Key Performance Indicators at the Grant, Outcome and Objective levels. The graphical interface presents an attractive and simplified visual on how change happens, and the progress towards impact.

Theory of Change

The theory of change for a programme or advocacy campaign is a narrative or visual description of what the overall programme or campaign intends to achieve and how it plans to accomplish this. Clear theories of change can help identify exactly what evidence should be monitored, and clarify how the campaign network expects to achieve intended outcomes, including specifying the causal relationships, or linkages, that the network expects will help in realizing those outcomes.

Rather than providing an implementation plan, it describes how change is expected to happen and the signs of progress to look for along the way.

Theory of Action

While the theory of change illuminates the collective network strategy and network-level outcomes, a theory of action describes the specific strategy or strategies that guide an individual organization's actions and activities and partner-level outcomes. It articulates how an individual actor will contribute toward collective network outcomes while also pursuing internal goals. Clearly articulated theories of action—which are aligned with the network-level theory of change—create a cohesive, yet flexible and adaptive, framework that helps ensure coordinated action at all levels

An example of programme-advocacy campaign work plan is reflected in Figure 1 – Programme-Campaign work plan.

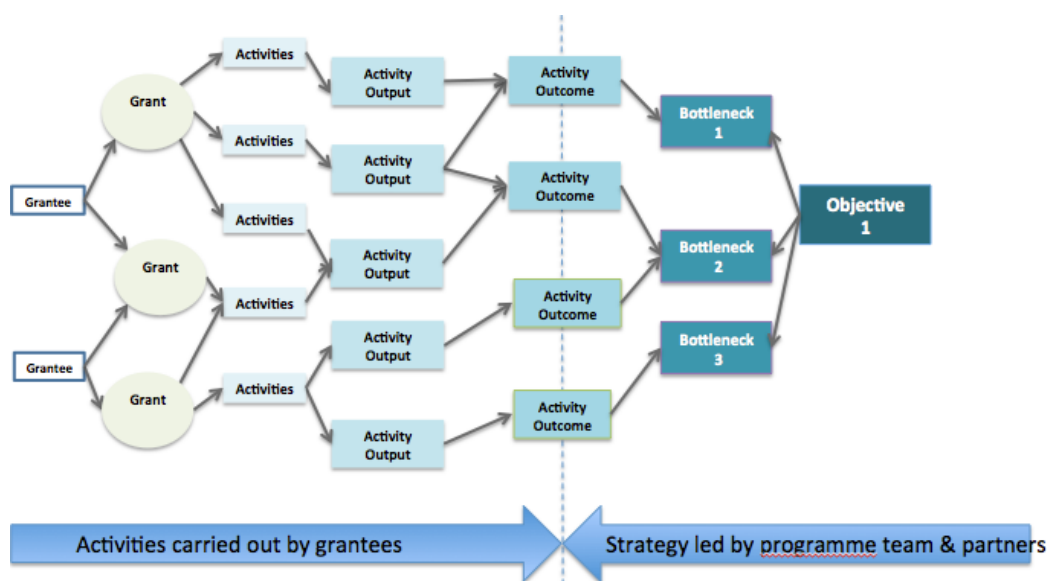


Figure 1: Programme-Campaign work plan or Theory of Action Map.

The Programme-Campaign work plan is divided in two sections: the right section (going from the Programme-Campaign objectives to the bottlenecks/drivers and to the activity outcomes) describes the Theory of Change of the programme/Campaign, while the left section shows the Theory of Actions of each Grantee (from the Grantee to the Grant, activities, activity outputs and activity outcomes) identified to meet the programme-Campaign objectives.

Such work plan or Theory of Action Map is internally at the ECF referenced as the PARL tree. It describes the activities potentially influenced by the ECF and partners through the ECF ToC. It is not the intention to capture on this map the complete venue overview, with all parties and activities involved, even though such map can be interested as well to develop the ToC.

2. PARL uniqueness

While logic models had been used since many years in strategic philanthropy and in other industries to visualize a strategy to attend an objective, the true uniqueness of PARL is to have built the visual interface connected to an on-line database. The objective was to enhance the visibility of strategies, the strategic analysis and the potential collaboration between grantees, ECF programmes and funders working on a shared strategy. Another objective was to be able to report on the strategy and on its likelihood to success, with reporting addressing different strategic levels and different audiences. We'll see later in the Chapter C. Findings if these objectives have been met.

3. Strategic Cycle

The PARL tool is used through the four stages of the ECF evaluating framework:

- i. Planning
- ii. Assessment & Monitoring
- iii. Reporting
- iv. Review & Learning.



The ECF Strategic Planning, Monitoring And Review Process

1. Planning: The programmatic strategy is captured in PARL
2. Assessment & Monitoring: The progress of each programmatic strategy implementation is monitored against the planned outcomes
3. Reporting: Different reports are generated from the system based on the differing user requirements
4. Review & Learning: The experience of strategy implementation is used to inform and strengthen future work.

At certain periods in the year there is a stronger focus on one stage over another but all stages can and do happen concurrently. Like the strategy itself it is a dynamic as opposed to static process. It is an iterative process as opposed to one that has a defined beginning and end.

3.1. Strategic Planning

Organisation planning starts at Programme / Campaign level and evolves downwards to objective, bottlenecks/drivers, outcome, output, activity and finally ending at grant/grantee level. Planning starts with agreeing the main objectives that the programme or campaign sets out to achieve and ends with the approval of grants through which the strategy is delivered. This is the ECF logic model/theory of change. It articulates the potential contribution of a grantee toward collective outcomes, helps ensure coordinated actions and demonstrates how the change process will occur.



3.2. The Assessment Monitoring Stage

The ECF Assessment Monitoring Stage starts at grant level and develops/evolves upwards ending at Initiative level. It develops in the opposite direction to the Planning Stage. It is usually initiated/triggered by the submission of the grant narrative progress reports from the grantees, but it could happen anytime a programme officer deems it makes sense to do it e.g. because of a change in the context or a specific reporting request. Based on an analysis of this performance a progress assessment can be made at each subsequent strategy level from, Activity, Output, Outcome, Bottleneck, Objective and finally ending at Initiative level.

3.3. Reporting Stage

PARL is used to generate different types of reports, for different users, at different intervals, for different purposes, based on the objectives of accountability and learning. The system reporting is informed by the different audience requirements.

3.4. Review and Learning

PARL is a valuable tool for learning and development. The ECF activities and grants aim to make a meaningful difference and contribution to achieving the outcomes and objectives. This is articulated in the theories of change for each objective. Where outcomes are not being achieved despite grants successfully reaching the KPIs, the theories of change need to be reconsidered and negative assessments could trigger a potential change in the objective strategy. Where outcomes are being achieved we need to better understand why and positive assessments should lead to further analysis to understand the reasons of the success so the achievement can be replicated.

In this way the system generates a better understanding of where the ECF stands against its strategy and enables the ECF use the learning to improve/adapt the strategy as required. This is dependent on the timeliness, quality and integrity of the information inputted in the system and having a process in place for review and learning.

The typical programmes managed via PARL at the ECF count between 1 to 3 objectives and each objective count between 15 to 100 grantees on a yearly basis.

4. PARL Design

The following two screenshots show how PARL graphical interface looks like.

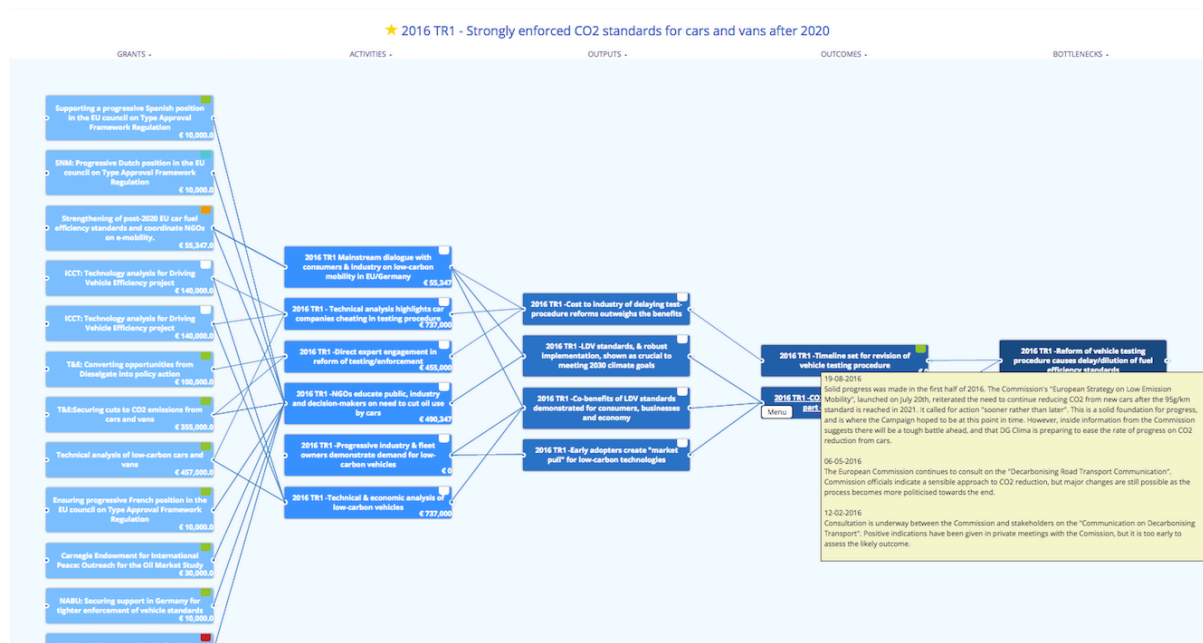


Figure 2: PARL Monitoring view – using traffic light at grant, outcome and objective levels

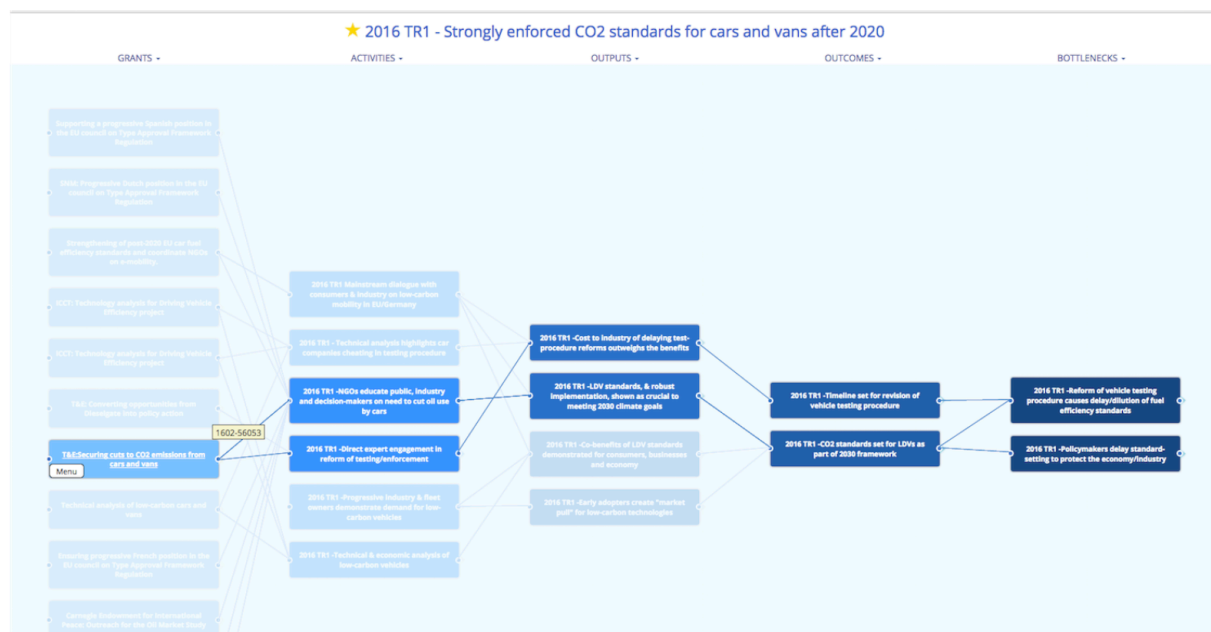


Figure 3: PARL – highlighting the contribution of a grant towards the achievement of the programme objective

The Annexe II shows the evolution of the PARL design over time.

C. Findings

After nine years since the ECF programmes use PARL for their strategic planning, monitoring, and learning processes, it's a good time to analyse the impact of the PARL Tool on grantmaking effectiveness, expressed by some key stakeholders.

Key stakeholders are mostly internal at the ECF – we are going to come back on this important dimension under the next section on Change in Context & Opportunities – even if PARL was presented during forums organized by the Technology Association of Grantmakers (TAG) and several foundations had expressed the willingness to use such tool for their own Planning and Monitoring system.

Johannes Meier, who was the CEO of the European Climate Foundation between 2011 and 2016, when the ECF decided to create and use PARL for strategic planning, monitoring, reporting and learning, had mentioned back in 2015: "We're using PARL across all our programmes and it has increased collaboration and decision making internally while getting great feedback from our funders and supporters."

Several workshops were organised through the years with the main users of the PARL tool, the ECF programmes, in order to continuously assess its usage, its benefits, but also its challenges in order to find ways to turn them down.

Findings

- The use of the PARL logic model as a system describing the grant contribution to the achievement of the objective is recognised as a major contributor of the strategic programming of ECF programmes.
- The quality and the usage though will depend on the interest by the programme director and in some cases the quality of the data (the strategic clarity) is still debatable. Some programme directors use PARL logic model as a tool for co-creating their programmatic strategies with their key grantees and their funders, some don't
- It improves internal organizational alignment and communications through a common, documented framework
- It allows programmes to monitor their strategies and track progress against their objectives
- When the tool is used at its best and in a co-creation mindset, it greatly increases clarity and improves strategic decision making by providing a common strategic language between the organization, the funders and some of its grantees.

Additional Benefits

- It establishes a common language across the organisation: the words Objectives, Obstacles, Outcomes have the same meaning and programmes can quickly relate to each other's strategy and challenges
- It increases the clarity in the strategy: what do we want to achieve and how, what do we not do, etc... The logic trees can be used as basis for the strategic discussions with program teams, Mgt and partners

- It can highlight resource imbalances across the organization, or serves as a reality check on assessing if enough resources or activities are planned to realistically achieve the desired outcome
- It helps in the regular question around Contribution/Attribution of a grant or a programme strategy in the achievement of an objective, as the whole strategic logic sequence is defined ex-ante.

Challenges

- The usual “Garbage-in = Garbage-out” problem comes at strength. By garbage is meant “poor strategy” or “difficulty or inability to articulate its strategy through a logic model”. The tool shows in a very transparent way if a strategy is clear and robust or if it’s confused or inappropriate
- It is difficult to determine a baseline (what is your starting point) to measure the level of change which is required
- It is not easy to find the right balance between the time spent in planning and monitoring versus the strategy delivery
- The logic model structure can sometimes appear too rigid and tend to oversimplify complex strategies. Also, there is a question if the different types of programmes existing at the ECF (country programmes, sector programmes, integrated campaigns, ..) should use the same type of system to articulate their strategies, as the types of goals are different
- The use of PARL is seen as more difficult in high changing context because the adjustment of the strategy in the logic model can be time consuming
- The bigger the programmatic goal or objective is, the more complex the logic tree becomes. The same with the number of activities and grants: at the year end, the logic tree becomes sometimes unreadable due to the number of connections between grants, activities and outcomes
- The reporting function has always been a challenge as there are different levels and audiences for programmatic reporting, and the needs are different even within the same level and audience (e.g. different funders will want different type of information on the same programmatic strategy, which would lead to a multiplication of data entry in the system “in order to cover for all the potential reporting uses”, which is not possible
- PARL is useful to understand the programme strategy, but less to see the bigger strategic picture at the organizational level.

Looking at the above, we see that while there are real benefits of using a system like PARL, the list of challenges raises the needs for potentially looking for other ways to do strategic planning, monitoring and learning, especially in ways that could support the co-creation and the collaboration between the different actors in the usual network of partners.

III. Change in context: Complexity and Collective Intelligence

A. Change in the operating context

While its existing MEL system and processes, and the PARL system are considered as robust, the ECF believes it needs some changes in the coming years:

It starts with an observation that it is by now widely shared: “Climate change is a “super wicked problem”: its causes are multiple and complex, its impacts are uncertain and interrelated, and potential solutions to climate change might well cause further problems. While climate change was for a long time the domain of climatologists and geographers, it is now part of mainstream debates in many disciplines.” (Geneva Graduate Institute, 2019).

This observation alone justifies the switch in the refresh of the ECF strategy in 2021, calling for a whole-society approach and a broadening of its usual network of partners.

The context in which we need to operate has also changed over the years. It is defined nowadays by rapidly developing crisis (e.g. covid and war in Ukraine) and interconnected problems (social injustice, broken democracy, economic inequality, climate change, ..), therefore the capacity of traditional linear ToC/logic model as used in PARL is limited and fails to capture the complexity of the issue addressed. As mentioned earlier, tentative modelisation of such complexity ex-ante leads to highly time-consuming process and heavy system which ultimately fail to capture causalities and interrelated dynamics.

This type of process also often fails to assess and integrate lessons learnt based on groundwork observation (and not theoretical TOC) in a dynamic way in order to adjust to reality: what key information/evidence are useful for on-the-ground stakeholders to make the right decisions? This information may often vary during implementation stage and require agility to adapt (rather than stick to what was perceived as key indicators in an ex ante brainstorming).

B. Emergent Learning

In order to increasingly build strong and strategic collaboration within and outside its usual network of partners, the ECF needs to be able to communicate its strategy in a simpler and more transparent way. Especially if it wants to increase its impact in all its four roles (thought leader, strategic regenerator, network enabler, and narrative shaper). This is a prerequisite for any future collective action and success.

Indeed, the transfer and sharing of information within a network of partners is paramount for it to be effective. Each partner has to be able to know what information exists, how it is used, by whom, for what purpose, in order to define its own role and purpose in the network.

Emergent Learning (EL) is the disciplined attention to insights that emerge from collective work and the deliberate application of those insights to improving future results.

Emergent Learning & Complex Adaptive Systems

In a complex world, groups need to learn how to adapt on the basis of experience to achieve their goals. They need to understand the systems not from the point of view of some grand designer or outside observer, but think about them from point of view of an “agent” on the ground interacting with a whole community of agents. Indeed, traditional management theory tends to operate from the perspective of a chess player, looking from the outside in and assuming that elements of an organization can be moved around like chess pieces.

The systems we work in today are full of sentient beings interacting in complex environments, around complex and sometimes competing goals. These systems are more like a football team trying to score a goal on the field full of other sentient beings, who each have a different point of view.

If we are going to help a group increase its ability to accelerate results, we need to call on the whole group’s intelligence and resourcefulness in real time.

C. PARL in the future

What does it mean for the future Planning, Monitoring and Learning system of ECF and its network?

ECF aims to support its current network of organisations to move into a **learning network of organisations, and therefore** to transform its own internal strategic planning, monitoring, reporting and learning process to a system that could be used by the network based on the following principles:

- Increased clarity on hypothesis, strategy and outcomes within the network: promoting information sharing and collaboration, via a focus on shared strategy and outcomes
- The creation of an IT platform accessible by all the actors of the network. Where everyone can in an easy way access to each other hypothesis, outcomes, activities, success and failures
- The move from a linear causal effect theory of change to a combination of interconnected outcomes identification with a test and learn approach
- Real time monitoring and learning at grant and programme levels, which would allow every organization of the network to learn from the others in real time, and would lead to rapid strategic adjustments when necessary
- Explore predictive analysis with AI: The increase use of data analysis, machine learning, and statistical models to find patterns that might support strategic planning and monitoring.

IV. Conclusion

This paper has explained how the PARL system has supported the development of the ECF in its role as strategic grantmaker since 2013.

PARL has been created by the ECF to increase the clarity on its programmatic strategy, and to explain the contribution of each grant it makes to the achievement of the programme’s objective. It has been used since almost 10 years and has been adopted by all ECF programmes.

While the use of the PARL logic model as a system describing the grant contribution to the achievement of the objective is recognised as a major contributor of the strategic programming of

ECF programmes, the quality and the usage though will depend on the interest by the programme director and in some cases the quality of the data (the strategic clarity) is still debatable.

When the tool is used at its best and in a co-creation mindset, it greatly increases clarity and improves strategic decision making by providing a common strategic language between the organization, the funders and some of its grantees. Over the years, a few challenges have been highlighted, mainly around the time spent ex-ante in building the logic tree, the rigidity of the logic model in high changing context, and the reporting function.

The change in the external context (increased complexity and interconnected problems, polycrises and changes in assumptions) lead the ECF to think about its next generation of system for strategic planning, monitoring and learning. Emergent Learning and complex adaptive systems theory tend towards increased collaboration, information sharing and collective intelligence type of processes. These principles should definitely be at the basis of the future system.

1. Annex I: Literature Review

A. Grantmaking models and best practices

1. Anheier, H. K., & Leat, D. (2006). Creative grant-making: Philanthropic foundations in the 21st century. In H. K. Anheier & D. Leat (Eds.), *Creative Philanthropy: Toward a New Philanthropy for the Twenty-first Century*. London: Routledge.
2. Carman, J. G. (2009). Nonprofits, funders, and evaluation: Accountability in action. *The American Review of Public Administration*, 39(4), 374-390.
3. Brest, P., & Harvey, H. (2008). *Money Well Spent: A Strategic Plan for Smart Philanthropy*. New York: Bloomberg Press.
4. Tierney, T. J., & Fleishman, J. L. (2011). *Give Smart: Philanthropy That Gets Results*. New York: Public Affairs.
5. Technology Association of Grantmakers (2021). *The strategic role of technology in philanthropy – Your philanthropy Tech Strategy for 2021*.

B. Strategic grantmaking for collective impact

1. Kania, J., & Kramer, M. (2011). Collective Impact. *Stanford Social Innovation Review*, 9(1), 36-41.
2. Morino, M. (2011). *Leap of Reason: Managing to Outcomes in an Era of Scarcity*. Washington, D.C.: Venture Philanthropy Partners.
3. Easterling, D., & Metz, A. J. (2016). Getting real with strategy: Insights from implementation science. *The Foundation Review*, 8(2), 97-114.
4. Frumkin, P. (2006). *Strategic Giving: The Art and Science of Philanthropy*. Chicago: University of Chicago Press.
5. Riki Savaya, Mark Waysman, (2000). *The Logic Model: A Tool for Incorporating Theory in Development and Evaluation of Programs*
6. David O.Renz & Associates (2016). *The Jossey-Bass handbook of non-profit leadership and management*, fourth edition

C. The evolution of grantmaking strategy towards the inclusion of capacity building

1. Patrizi, P., & McMullan, B. (2016). Using evaluation to shape and direct your foundation's operations. *The Foundation Review*, 8(1), 44-59.
2. Grant, A. M., & Crutchfield, L. R. (2007). Creating High-Impact Nonprofits. *Stanford Social Innovation Review*, 5(4), 32-41.
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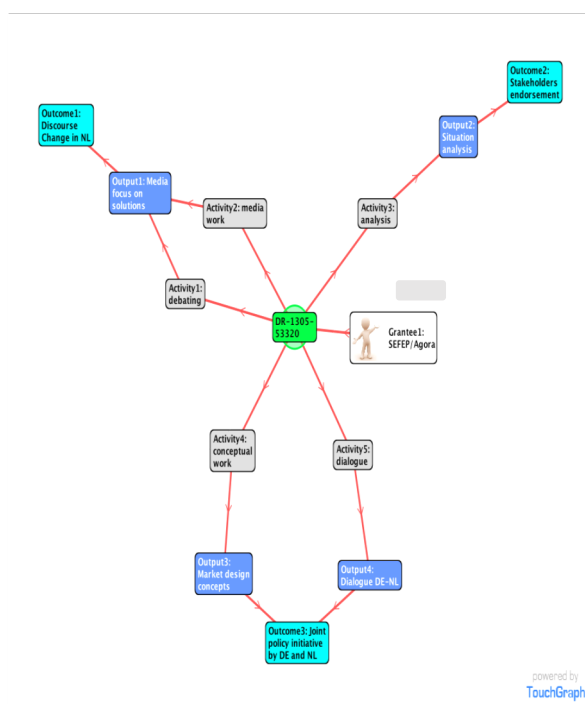
D. Others

- E. John H.Holland (2005), „Studying complex adaptive systems, *Jrl Syst Sci & Complexity* (2006), 1-8

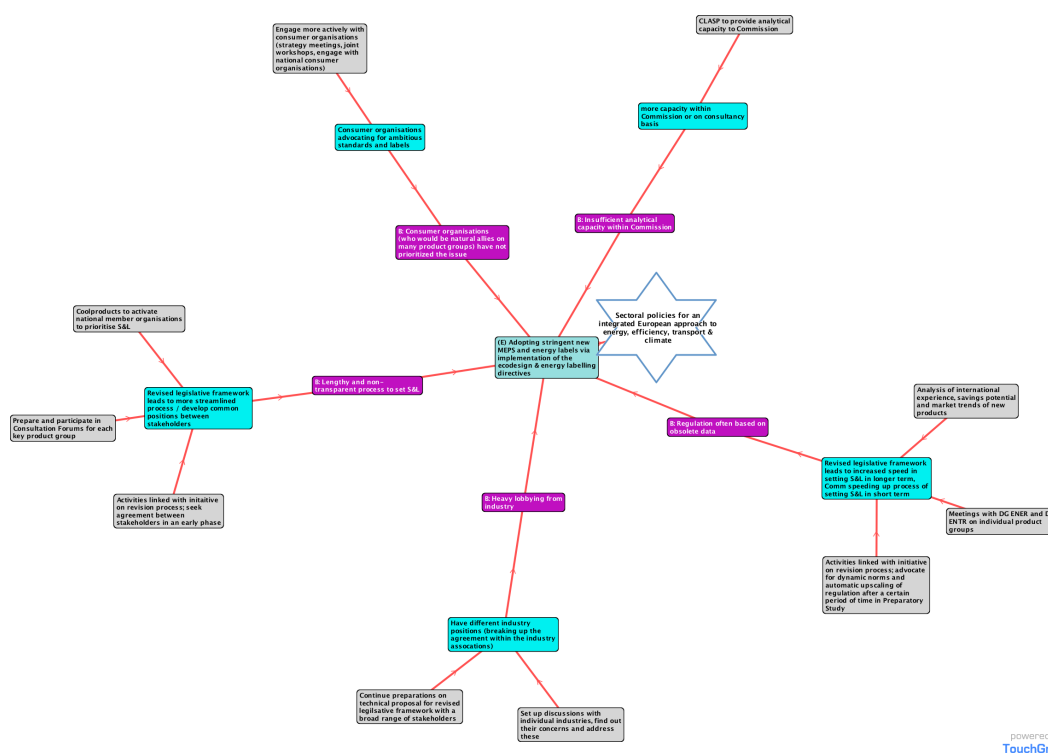
2. Annex 2: Journey of PARL visual graphical interface

This annexe provides an overview of the iterative process which took place in the ECF over the years to continuously update and improve the PARL graphical interface.

- **2013:** Grant (in green) at the centre of the graphical interface, showing how the grant contributes to different outcomes (light blue) – Theory of Actions



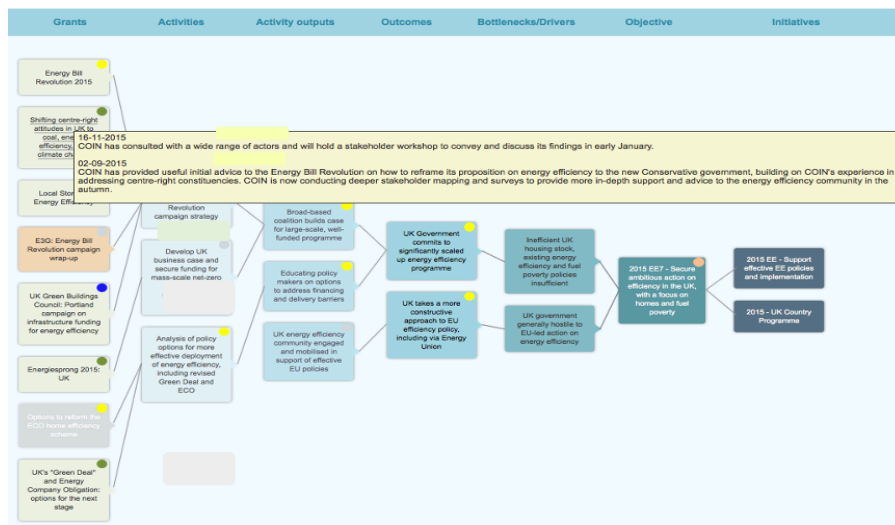
- **2013:** Objective (in green-blue) at the centre, obstacles (in purple), outcomes (in light blue), and activities (in grey) contributing to delivering the outcomes – Theory of Change



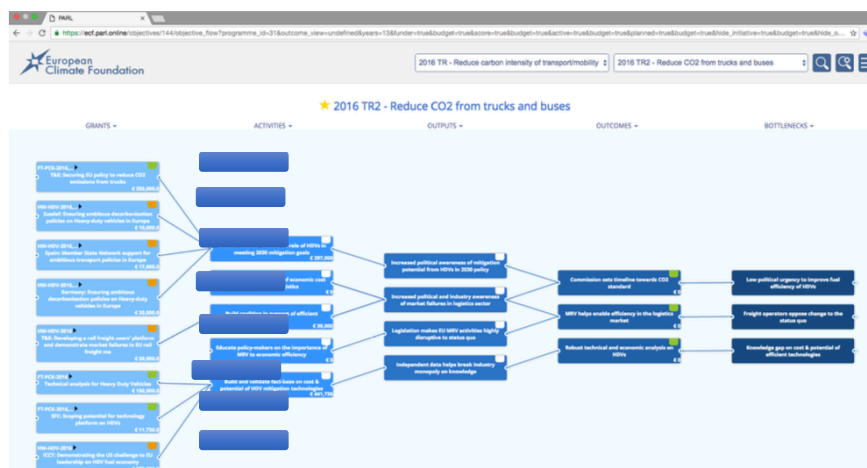
- [illegible]

- | Grants | Activities | Activity outputs | Outcomes | Bottlenecks/Drivers | Objective |
|---|---|--|---|---|--|
| Energy Bill Revolution 2015 | | | | | |
| Shifting centre-right attitudes in UK to coal, energy efficiency, and climate change | | | | | |
| Local Stories - Energy Efficiency | | | | | |
| E3G: Energy Bill Revolution campaign wrap-up | | | | | |
| UK Green Buildings Council: Portland campaign on infrastructure funding for energy efficiency | | | | | |
| Energiesprong 2015: UK | | | | | |
| UK's "Green Deal" and Energy Company Obligation: options for the next stage | | | | | |
| | Successful roll-out of Energy Bill Revolution campaign strategy | | | | |
| | Develop UK business case and secure funding for mass-scale net-zero energy refurbishment programme | | | | |
| | Develop a range of policy options for more effective deployment of energy efficiency, including revised Green Deal and ECoS | | | | |
| | | Broad-based coalition builds case for large-scale, well-funded programme | | | |
| | | Educating policy makers on options to address financing and delivery barriers | | | |
| | | UK energy efficiency community engaged and mobilised in support of effective EU policies | | | |
| | | | UK Government commits to significantly scaled up energy efficiency programme | | |
| | | | UK takes a more constructive approach to EU efficiency policy, including via Energy Union | | |
| | | | | Inefficient UK housing stock, existing energy efficiency and fuel poverty policies insufficient | |
| | | | | UK government generally hostile to EU-led action on energy efficiency | |
| | | | | | 2015 EET - Secure ambitious action on efficiency in the UK, with a focus on homes and fuel poverty |

- **2014:** Same view but with monitoring (traffic light) at different strategy levels



- **2016:** Improved graphical interface allowing for filtering, sorting and grant contribution identification



- **2020:** Graphical interface allowing to see the Theory of Change only (Outcomes-Obstacles-Objective) with traffic light system

