Program and Accelerator Theory of Change (ToC) Update Guidance to enable 2025 reporting

Guidelines management

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Revision interval	As needed
Revision history	Version 4.0. Effective 9 October 2025.
Related documents	ToC Tool Guidance; ToC Update Guidance

Introduction

To enable accurate reporting of 2025 results, Programs and Accelerators must review the completeness of their Theory of Change (ToC). The reporting of results will follow a new method this year, which is more closely linked to the ToC. The ToC software platform (ToC Tool) will be open from the 6th of October to close of business on the 17th of October to allow for edits to the ToC. This is an opportunity to complete missing information or correct erroneous information. It is not an opportunity to make major changes to ToC structure or content.

Requirements

Critical updates to the ToCs**:**

- All High-Level Outputs (HLO), Intermediate Outcomes (I-O), and 2030 Outcomes (2030-O) must include appropriate indicators and targets
- All W3/bilateral projects which have been mapped to and agreed by Programs or Accelerators must be tagged as contributing to results within the ToC.

In addition, it is **desirable**, but not essential, that results also specify:

- Geographies
- Contracted partners
- Cross-Program/Accelerator contributions

Issues which **do not need to be addressed** for 2025 reporting are listed below. These issues (and others) will be tackled when updating the ToC for 2026 planning.

- Major and moderate changes to ToCs (e.g. revised AoWs, revised result nodes and causal logic).
- ToC quality improvements (as recommended by ISDC, Prioritization, Evaluability Assessment, etc.)
- Center-specific contribution to annual KPI targets (The ToC Tool allows you to enter this information for 2025, but you may skip it. It will be required when setting 2026 targets for the PORB/planning process).

Explanation

Indicators and targets are needed for each High-Level Output, Intermediate Outcome, and 2030 Outcome, so that results may be reported against these and thus provide evidence of progress against the theory of change. During reviews of Theories of Change it was found that many result nodes, especially at the outcome levels, did not have defined indicators. These need to be added. There was also substantial use of custom (non-standard) indicators, which should be used only where necessary. Misuse of the custom indicator field included issues such as defining an outcome indicator (innovation use) and using it to evidence achievement of HLO. We therefore ask all Program and Accelerator teams to carefully check that all HLOs and Outcomes have properly defined and appropriate indicators. Where these are found to be lacking, they should be added or corrected.

Targets need to be set for each indicator. These should be annual targets for the whole Program or Accelerator to achieve. For the reporting of 2025 results, targets only need to be set for 2025, and do not need to be split out per Center. Where 2025 targets are missing, they should be added. If no result is expected in 2025 then the target should be set to zero. Targets which have not been met should not be scaled back at this juncture.

W3/bilateral projects which have been mapped to and agreed by Programs or Accelerators must be tagged as contributing to result nodes (HLOs, Intermediate or 2030 Outcomes), so that it is possible to report the results of those projects by the Program or Accelerator. This includes the W3/bilateral projects which have been recently re-aligned or where disagreements as to the alignment have recently been settled.

Dataflow in ToC Tool

The information you enter in the ToC Tool will be **re-used in future processes —** including 2025 reporting and 2026 planning. Updating it now means you will **save time later**. For your awareness, key data points that flow into other processes include:

- Result nodes - Outputs and Outcomes
- Indicators and Targets
- Targets by Center (pooled) and by W3/Bilateral projects
- Geographies
- Partners and cross-Program collaboration
- W3/Bilateral mapping

Update of the ToC Tool Software

Since the ToCs were published in June, the ToC tool has been updated with a new module called “Result Framework”. This allows the management of all indicators in one place, without the need to click on each single result. The indicators selected from the module will appear automatically under each result identified. This new interface will need to be used when updating indicators or targets for 2025 reporting.

Although not all of these features are necessary for the 2025 reporting update, the full functionality of the “Result Framework” module allows you to:

- Add, edit, delete indicators for outputs, outcomes, and impacts.
- Set the same indicators for multiple results (e.g. the same knowledge products indicate progress on two different HLOs) or for multiple programs (e.g. the same knowledge products indicate progress on HLOs for two different programs, who are collaborating on those knowledge products.).

- For qualitative indicators, Programs and Accelerators are allowed to set more than one indicator for the same outcome.
- Set targets for all indicators
- Set targets by Center (from W1/W2 funding) or by Project (W3/Bilateral) and combine them as needed in multiple rows.
- Modify the cumulative targets and baselines under each result (outputs and outcomes).
- Add any collaboration with other programs/accelerators. In case you choose the same indicator the collaboration will be automatically set.

Method 1 - Identify critical information missing from its 2025 ToC

To review the completeness of indicators and targets, and W3/bilateral project tagging, export the current ToC to excel, using the button located in the toolbar on the right side of the ToC tool when in editing view, or located in the top left of the screen when in viewing-only mode (Figure 1).

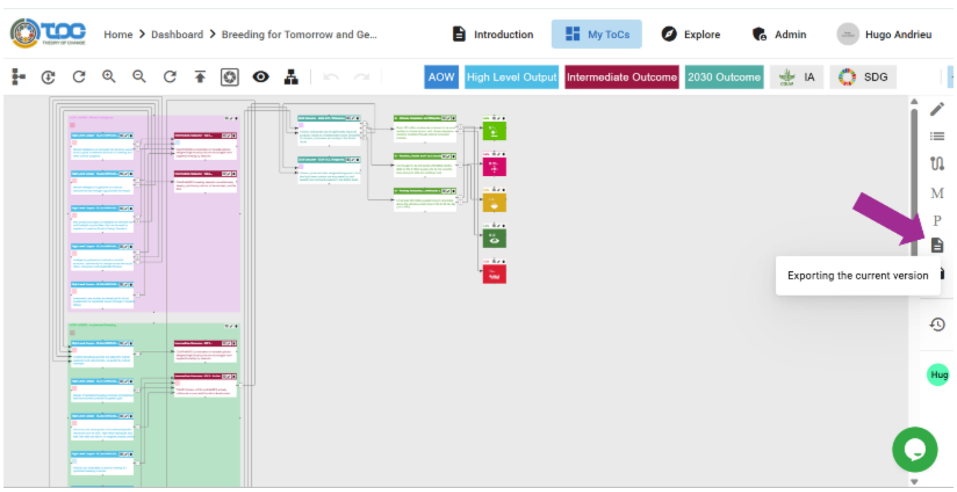


Figure 1: Exporting current ToC version to excel

Within the file, the worksheets titled “Result Framework” and “2030 Outcome” contain lists all of the result nodes and their descriptor fields (Figure 2). Using the columns “Indicator”, “Unit of measurement”, and “2025 target value” you may review the completeness and appropriateness of the content. Use the “filter” function to search for blank values. If there are any custom indicators, ensure they are appropriate.

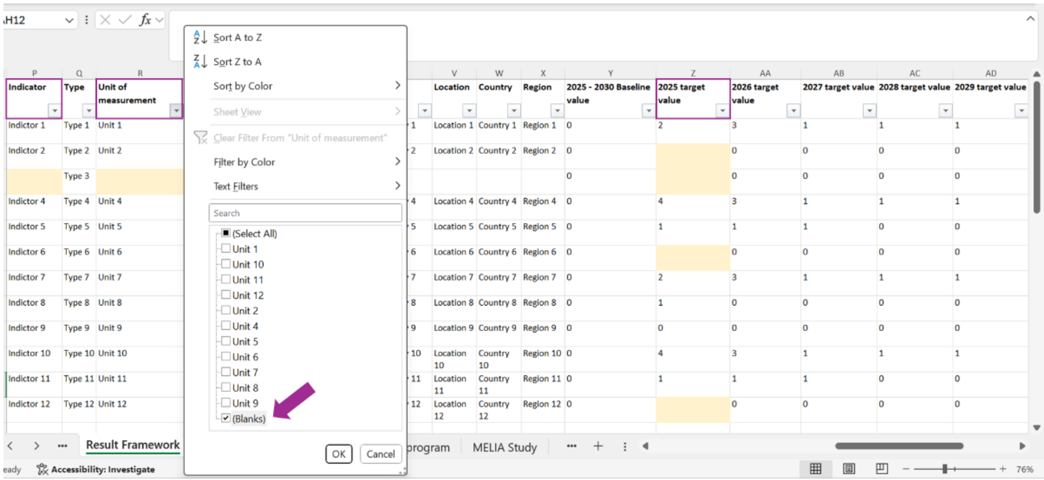
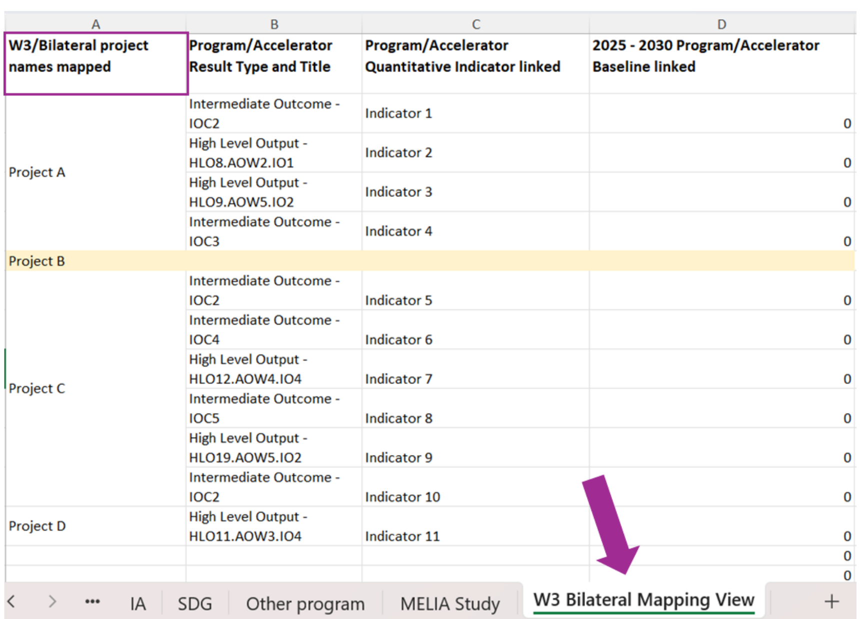


Figure 2: ToC Excel download worksheets "Result Framework" and "2030 Outcome", with the columns to be used during review and blank cell values highlighted. The "filter" window has been opened to allow searching for blank cells.

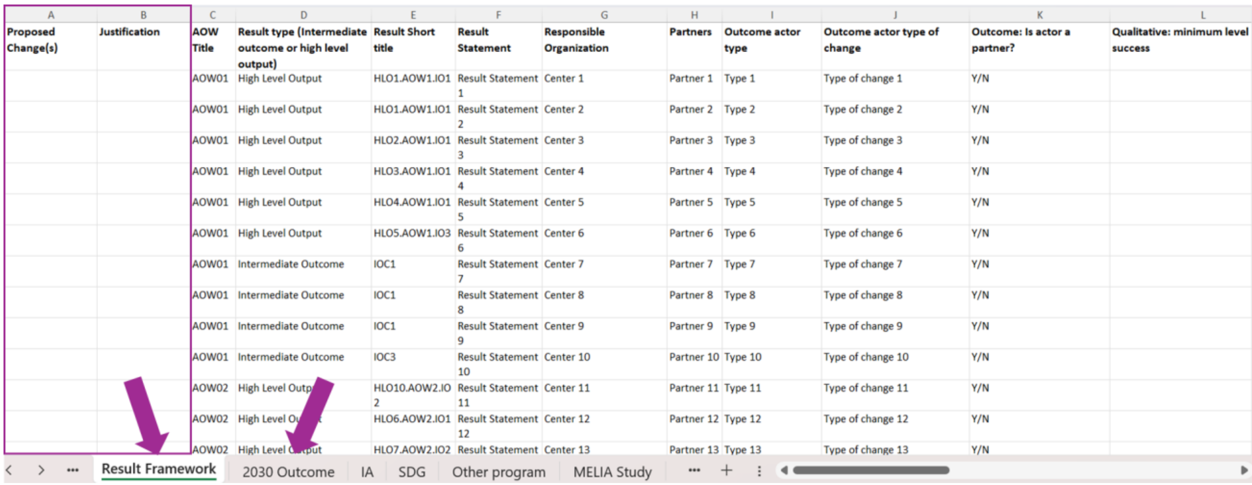
To check the tagging of W3/bilateral projects to result nodes, use the worksheet titled "W3 Bilateral Mapping View" (Figure 3). This contains a list of all W3/bilateral projects which are available within the Theory of Change in Column A "W3/Bilateral project names mapped", and in Column B "Program/Accelerator Result Type and Title" the tagged result node is listed for that project. Two things should be checked: first that all of the aligned W3/bilateral projects are listed in Column A, and secondly that all of the projects are tagged to a result in Column B. If W3/bilateral projects are missing from column A "W3/Bilateral project names mapped", please contact the support staff listed at the end of this document. If projects are not tagged to result nodes, please link them to appropriate result nodes within the Theory of Change.



W3/Bilateral project names mapped	Program/Accelerator Result Type and Title	Program/Accelerator Quantitative Indicator linked	2025 - 2030 Program/Accelerator Baseline linked
Project A	Intermediate Outcome - IOC2	Indicator 1	0
	High Level Output - HLO8.AOW2.IO1	Indicator 2	0
	High Level Output - HLO9.AOW5.IO2	Indicator 3	0
	Intermediate Outcome - IOC3	Indicator 4	0
Project B			
Project C	Intermediate Outcome - IOC2	Indicator 5	0
	Intermediate Outcome - IOC4	Indicator 6	0
	High Level Output - HLO12.AOW4.IO4	Indicator 7	0
	Intermediate Outcome - IOC5	Indicator 8	0
	High Level Output - HLO19.AOW5.IO2	Indicator 9	0
	Intermediate Outcome - IOC2	Indicator 10	0
Project D	High Level Output - HLO11.AOW3.IO4	Indicator 11	0
			0
			0

Figure 3: ToC worksheet "W3 Bilateral Mapping View", with the aligned projects listed in Column A and the Program/Accelerator Result Node to which they are mapped. A project with no result mapping is highlighted.

When reviewing the excel export and identifying changes to make, please add two additional columns into location A and B for each worksheets titled "Result Framework" and "2030 Outcome". These are to record the "proposed change" and the "justification" (Figure 4). The proposed change should state which value is being changed, from what and to what. The justification should include a brief reason for the change. The cells in these new columns should only be completed on the rows where changes will be made. This is to provide accountability should changes be queried at a later date.



A	B	C	D	E	F	G	H	I	J	K	L
Proposed Change(s)	Justification	AOW Title	Result type (Intermediate outcome or high level output)	Result Short title	Result Statement	Responsible Organization	Partners	Outcome actor type	Outcome actor type of change	Outcome: Is actor a partner?	Qualitative: minimum level success
		AOW01	High Level Output	HLO1.AOW1.IO1	Result Statement 1	Center 1	Partner 1	Type 1	Type of change 1	Y/N	
		AOW01	High Level Output	HLO1.AOW1.IO1	Result Statement 2	Center 2	Partner 2	Type 2	Type of change 2	Y/N	
		AOW01	High Level Output	HLO2.AOW1.IO1	Result Statement 3	Center 3	Partner 3	Type 3	Type of change 3	Y/N	
		AOW01	High Level Output	HLO3.AOW1.IO1	Result Statement 4	Center 4	Partner 4	Type 4	Type of change 4	Y/N	
		AOW01	High Level Output	HLO4.AOW1.IO1	Result Statement 5	Center 5	Partner 5	Type 5	Type of change 5	Y/N	
		AOW01	High Level Output	HLO5.AOW1.IO3	Result Statement 6	Center 6	Partner 6	Type 6	Type of change 6	Y/N	
		AOW01	Intermediate Outcome	IOC1	Result Statement 7	Center 7	Partner 7	Type 7	Type of change 7	Y/N	
		AOW01	Intermediate Outcome	IOC1	Result Statement 8	Center 8	Partner 8	Type 8	Type of change 8	Y/N	
		AOW01	Intermediate Outcome	IOC1	Result Statement 9	Center 9	Partner 9	Type 9	Type of change 9	Y/N	
		AOW01	Intermediate Outcome	IOC3	Result Statement 10	Center 10	Partner 10	Type 10	Type of change 10	Y/N	
		AOW02	High Level Outp[illegible]	HLO10.AOW2.IO2	Result Statement 11	Center 11	Partner 11	Type 11	Type of change 11	Y/N	
		AOW02	High Level Ou[illegible]t	HLO6.AOW2.IO1	Result Statement 12	Center 12	Partner 12	Type 12	Type of change 12	Y/N	
		AOW02	High Level [illegible]tput	HLO7.AOW2.IO2	Result Statement 13	Center 13	Partner 13	Type 13	Type of change 13	Y/N	

Figure 4: Additional columns to be added for tracking changes to be made.

<u>Method 2 – Updating information via the revised ToC Tool</u>

Once the required changes have been identified, they must be entered into the **<u>ToC Tool</u>.**

Editing indicators and targets now follows a new protocol, described below. For all other updates needed in preparation for 2025 reporting (such as W3/bilateral contributions), the procedure in the web tool remains unchanged. For a refresher on how to update these fields, please consult the guidance <u>here</u>.

When in editing view, use the "Edit ToC Result Framework" button in the toolbar on the right to open the "Result Framework" module (Figure 5).

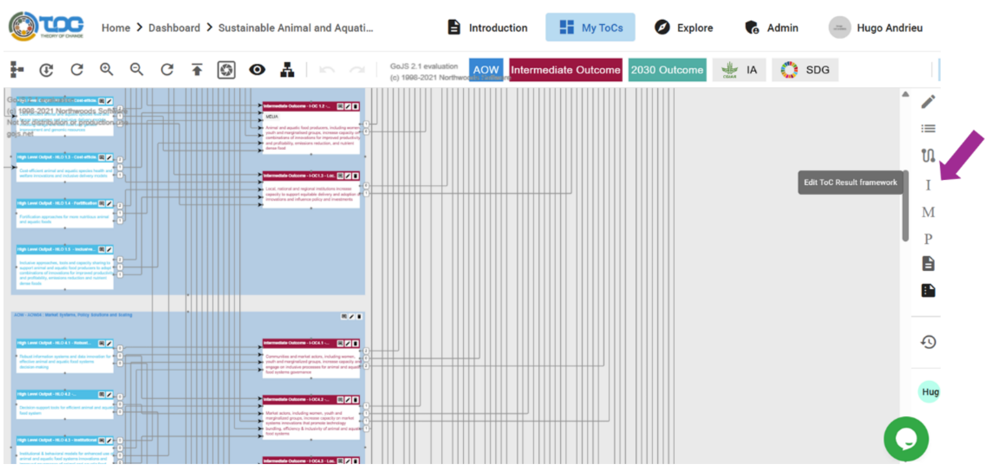


Figure 5: Editing indicators and targets via the “Result Framework” Module

Inside the “Result Framework” module pop-up window, you can navigate between quantitative and qualitative indicators.

In the Quantitative Indicators tab (Figure 6), you will find three filter bars at the top of the window and a table listing all indicators. You can locate an indicator by scrolling through the table, filtering by level or type, or searching by description or result title. You can also add new indicators from this screen by clicking on the plus symbol.

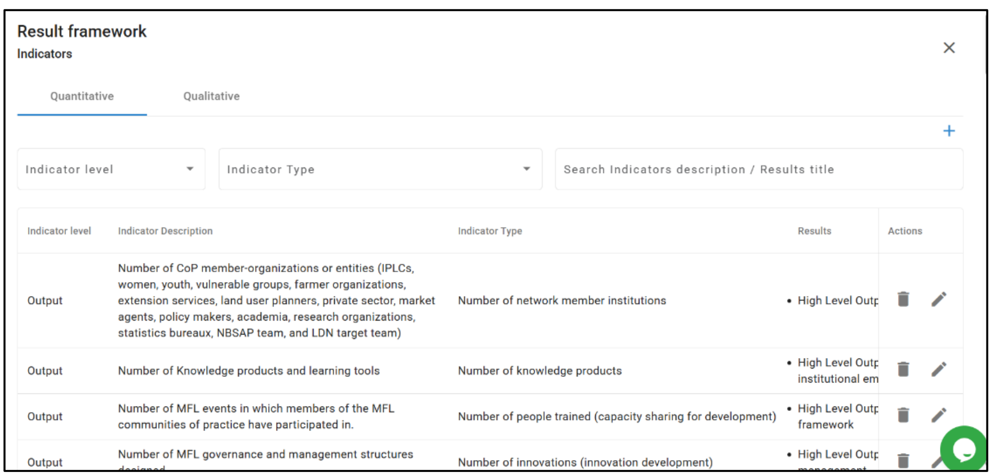


Figure 6: Viewing the window displaying quantitative indicators.

For qualitative indicators, you simply browse the indicator table in the corresponding tab (Figure 7). You can also add new indicators from this screen by clicking on the plus symbol.

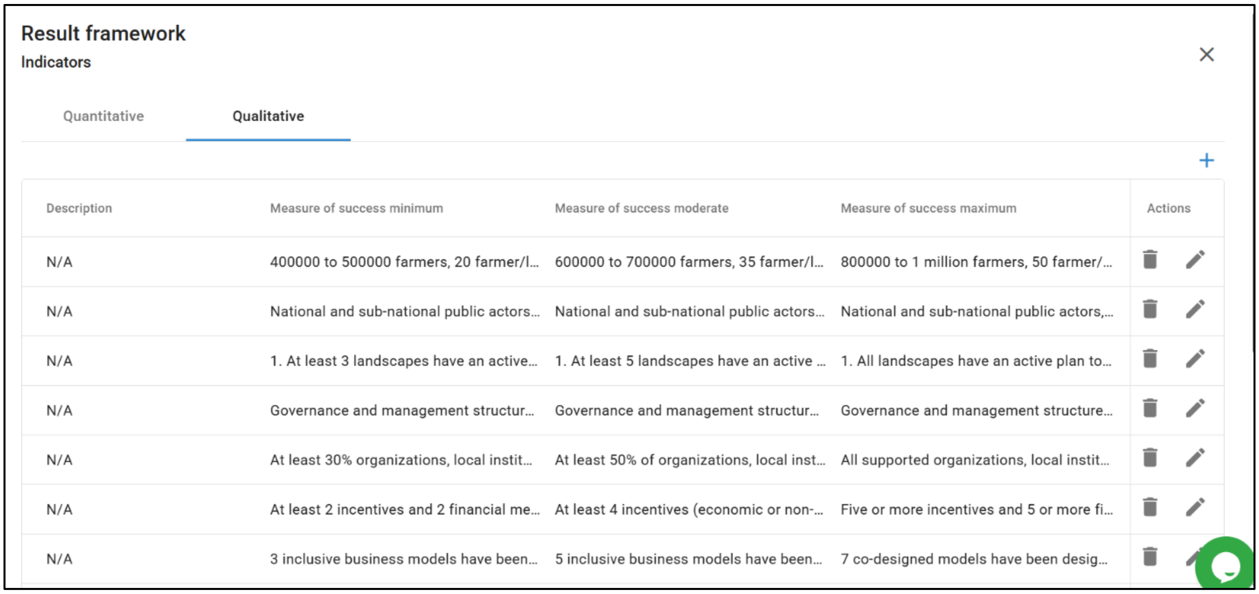


Figure 7: Viewing the window displaying qualitative indicators.

Once the relevant indicator has been identified, click "Edit Indicator" (Figure 8).

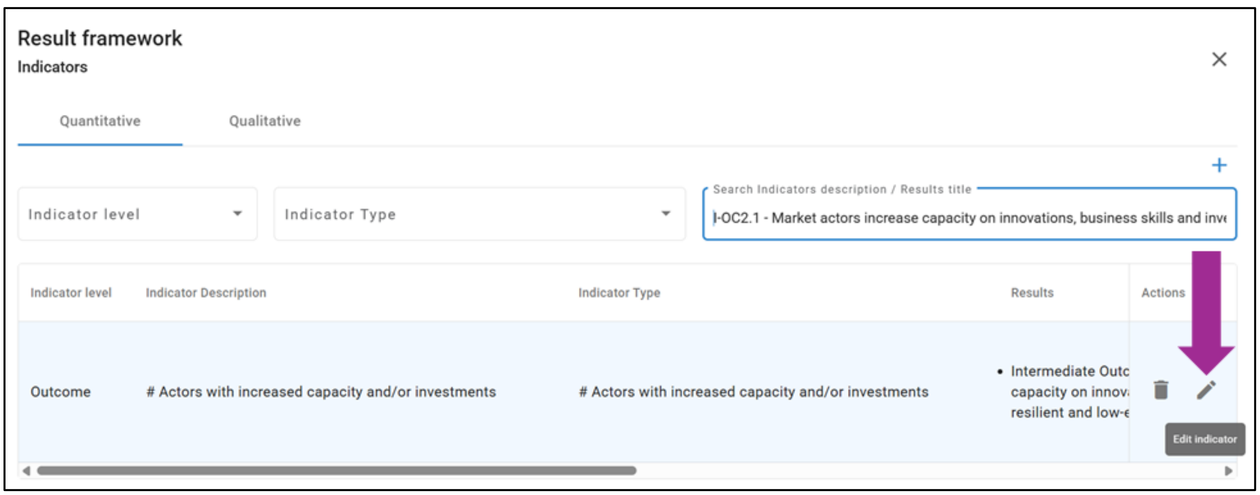


Figure 8: Accessing the quantitative indicator editing interface

When editing or adding new quantitative indicators, three tabs will be displayed: General, Targets, and Baseline. The General tab includes information such as result level and title of the specific result(s) which the indicator relates to, the indicator type, description, unit of measure, intended locations, cross-Program/Accelerator contributions, data source, collection method, and frequency (Figure 9). Any of these fields can be modified directly.

Figure 9: Editing general information for a quantitative indicator

In the Targets tab, you can update the values for 2025 (Figure 10). For now, it is not necessary to specify which Center contributes, but this will be needed for the 2026 ToCs.

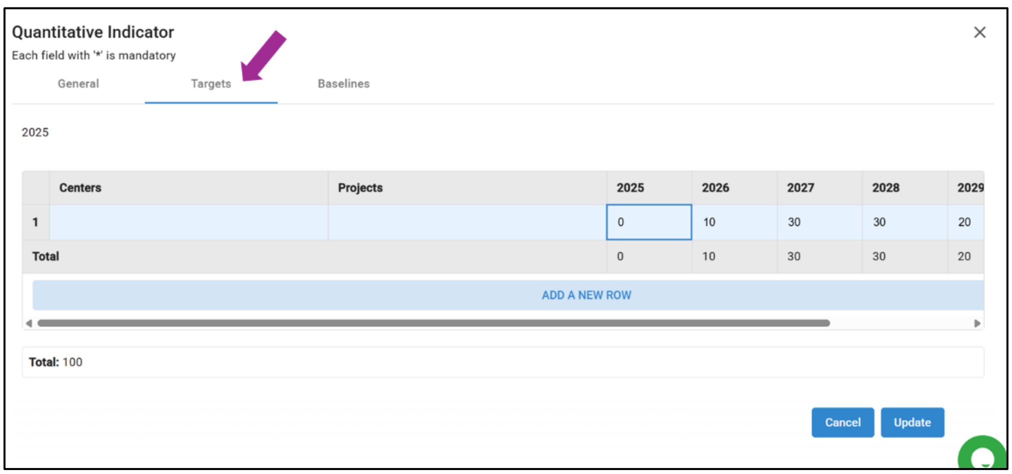


Figure 10: Editing targets for a quantitative indicator

For qualitative indicators, the "Edit Indicator" action opens a dedicated window where the relevant information can be modified in a straightforward way (Figure 11).

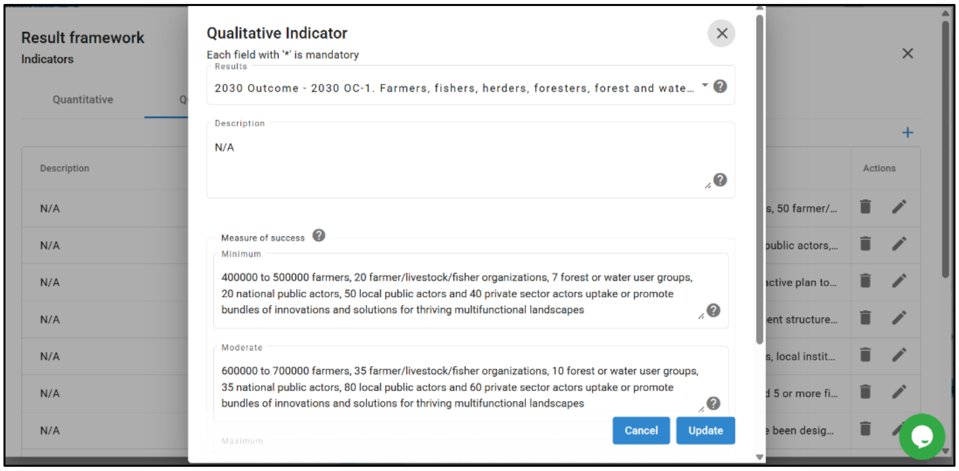


Figure 11: Editing information for a qualitative indicator

After all corrections have been made, you can publish the ToC. You may append the annotated excel file when publishing the ToC, or send it directly to PPU contact points.

Timeline

The update window is **strictly from the 6th of October to the close of business on the 17th of October.** After this period the 2025 ToCs will be locked.

With the publication of your 2025 ToC on the ToC Tool, please send your 2025 ToC excel files with the tracking of the changes and their rationales to PPU for validation (performanceandresults@cgiar.org).

After the 17th of October there will be an opportunity to update the ToCs which apply to 2026 and beyond. The period 6th to 17th October is only to make the corrections needed for proper reporting of 2025 results.

Support

Please reach out to James Hammond (J.Hammond@cgiar.org), Enrico Bonaiuti (E.Bonaiuti@cgiar.org), and Hugo Andrieu (H.Andrieu@cgiar.org) with queries or support needs. In addition, a Teams channel with the Program and Accelerator MELIA Focal Points will be set up to facilitate the communication.