GUIDANCE FOR IMPLEMENTING TAPE

Overview of the different steps and access to key resources

Updated 26/04/26

This document provides a practical overview to support the implementation of TAPE across different contexts and user groups. It is intended as a guiding entry point to the process, rather than a substitute for the detailed methodological guidelines, which are available in draft form and referenced throughout the document. You will find:

- *an overview of the different steps involved in implementing TAPE;*
- *key resources, including links to detailed guidance documents.*

INTRODUCTION

The Tool for Agroecology Performance Evaluation (TAPE) is an FAO digital tool (developed in 2019 with partners) that supports a robust, comparable assessment of both agroecological transition and sustainability performance of farming systems. It is designed for practical use in the field while generating evidence that can be aggregated from farm diagnostics to project, territorial and national insights.

What it measures: (i) the level of agroecological transition through Step 1 (CAET), based on the 10 Elements of Agroecology (26 indices; 52 criteria), and (ii) multidimensional sustainability performance through Step 2 across five SDG-aligned dimensions (Governance, Economy, Environment, Health & Nutrition, Society & Culture), with optional context-specific indicators.

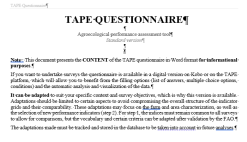
How it is implemented: a stepwise process—Step 0 contextualization and survey preparation; Steps 1–2 data collection at farm/household level; Step 3 participatory interpretation, validation and dissemination.

Who uses it and why: producers, field practitioners, researchers and governments use TAPE for baseline/endline assessments, monitoring and evaluation, comparison across farm typologies and contexts, and to inform evidence-based strategies and investments.

From farms to policy: results can be analysed for a single farm, aggregated across groups of farms/projects, and scaled to national assessments (TAPE National) to identify drivers and barriers, transition pathways and priorities for action.

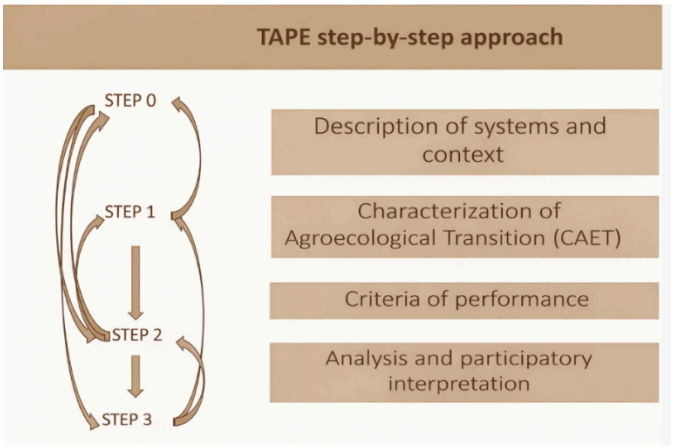
Recent improvements: TAPE was enhanced through the TAPE+ project (2024–2026; updated in 2025), with refined indicators and questions, stronger data management, and improved real-time analysis/visualisation; a global digital platform is planned for mid-2026.

USEFUL LINKS

Description	visuel	link
1/ TAPE Presentation brochure This 12-page brochure provides a general overview of TAPE and a presentation of its methodology, with the list of criteria and indicators for Stages 1 and 2 in the appendix.		TAPE Brochure EN
2/ Power point presentation This short power-point presentation provides with an introduction to TAPE general characteristics.		Power point presentation TAPE
3) TAPE questionnaire This document presents the content of the TAPE questionnaire in Word format for informational purposes. The Kobo questionnaire implemented on the field is an .xls version of this word document.		TAPE Word questi…
4/ Global TAPE Platform Using the provided username and link, you will be able to access the platform's initial features: list of implemented projects, access to the questionnaire, access to automatic visualization of survey results, access to the global dashboard, which presents the results of the TAPE pilot phase.		Plateforme mondiale TAPE *Access the platform with the button* "Login as guest" 

TAPE IMPLEMENTATION STEP BY STEP

This chapter provides a practical overview to support the implementation of TAPE across different contexts. You will find an overview of the different steps involved in implementing TAPE and key resources, including links to detailed guidance documents.



Designed for simplicity and comprehensiveness, TAPE comprises four key interlinked steps:

Before the survey: preparatory work

Step 0 – Contextualization of the survey and description of both the system assessed and its context

Survey at farm level

Step 1 – Characterization of the level of advancement in the Agroecological Transition (CAET)

Step 2 – Assessing the multidimensional performance using core criteria of performance

Interpretation and dissemination of the results

Step 3 – Sharing and *discussing the results of the assessment*

Figure 1: TAPE Stepwise approach (source: FAO)

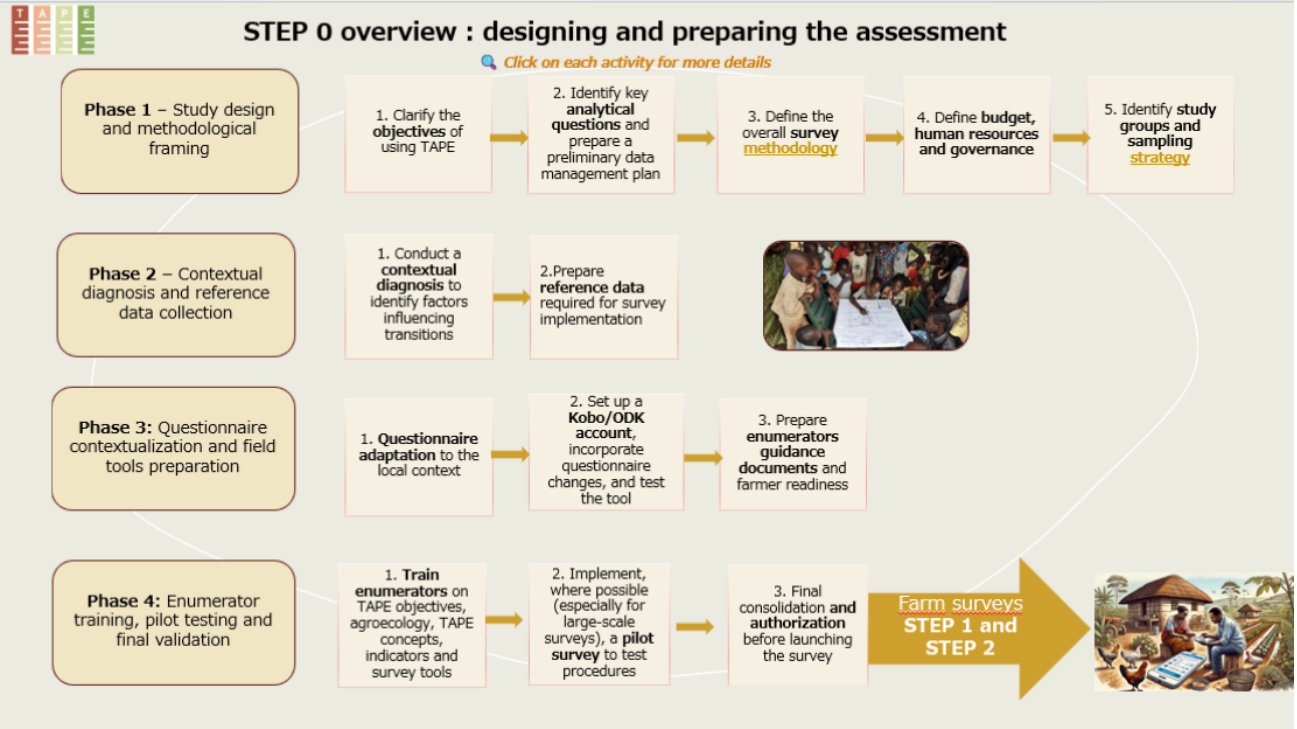
STEP 0

Preparation and contextualization

Step 0 is primarily intended for users conducting comprehensive surveys across multiple farms, such as within a study or project. For assessments of one or a few farms, the questionnaire and dashboard can be used directly.

For more information, please refer to DRAFT STEP 0 Guidelines: TAPE draft Guidelines and the power point tutorial (summary) of the guidelines TUTORIAL PPT TAPE STEP 0 detailled.pdf .

Figure 2: Overview of STEP 0 illustrating the key phases for designing and preparing a TAPE assessment



Note: If you are conducting a **small-scale assessment**, covering only a few farms, you may skip Step 0 and carry out the test **using the standard questionnaire available**

Phase	Activities

1. Study design and methodological framing	1. Clarify the objectives of using TAPE Indicate your needs and objective by filling this **short form** and contact the FAO TAPE team for guidance (tape@fao.org). 2. Identify key analytical questions and prepare a preliminary data management plan key analytical questions 3. Define the overall survey methodology 4. Define budget, human resources and governance 5. Identify study groups and sampling strategy
2.Contextual diagnosis and reference data collection	1. Conduct a contextual diagnosis to identify factors influencing transitions 2. Prepare reference data required for survey implementation
3.Questionnaire contextualization and field tools preparation	1. Adapt the questionnaire to the local context 2. **Set up a Kobo account** incorporate questionnaire changes, and test the tool 3. Prepare guidance documents and farmers readiness
4.Enumerator training, pilot testing and final validation	1. Train enumerators on TAPE objectives, agroecology, TAPE concepts, indicators and survey tools 2. Implement, where possible (especially for large-scale surveys), a pilot survey to test procedures 3. Final consolidation and authorization before launching the survey



STEP 1 and 2

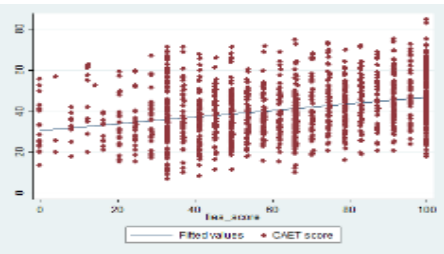
Surveys and data management

For more information, please refer to:

TAPE Questionnaire content: TAPE Word questionnaire_ENGLISH_8 July.docx
Zoom on STEP 2 indices and criteria: STEP 2 criteria detailed

Phase	Activities
1.Conduct the survey & ensure quality control	1. **Implement the survey** with the **Kobo questionnaire for TAPE survey** ensuring a well-informed prior consent of contributors (enumerators, respondents, FAO) on the agreement in the use of the TAPE tool (included in the questionnaire) and provide first feedback on the results through the **Automatic visualization of the results** 1. **Monitor the data collection** on a regular basis to ensure data quality and address emerging challenges (at local level and FAO level if needed)

	2. Provide preliminary data collection **feedback** to the local implementation leader or FAO as necessary
2.Organize, process, analyze and visualize the data	1. **Conduct preliminary data analysis and interpretation supported by automated visualization** available in real time 2. To go further (comprehensive statistical analysis, including complex data modelling, if necessary) R codes for indicator calculation, data validation, data analysis and visualization are available on Github (GitHub - MAUS-team/tape_calculator)
3.Report preparation	1. **Prepare a draft report** summarizing the background and objectives of the study, Step 0 contextualization, methods, and initial results.



STEP 3

Participatory analysis and policy dialogue

Phase	Activities
1. Participatory discussion of the results and report finalization	1. **Participatory analysis**: Facilitate workshops with farmers representatives' stakeholders for validating and interpreting initial results 2. **Engage with stakeholders** in a participatory manner to identify barriers and drivers of agroecological transitions **3. Finalize the technical report,** share with stakeholders and decide concrete actions to improve farmers livelihood, project interventions efficiency or
2.Policy discussion and actionable recommendations	1. Develop communication material like policy briefs, **2-pages report** and short presentation for policymaking stakeholders 2. Identify **actionable recommendations** based on the evidence generated and the stakeholder's feedback 3. **Dissemination of data** and results at local, national, sub-regional, regional and possibly global level to inform evidence-based policymaking

Figures and diagrams are developed by R. Cluset, FAO, unless otherwise indicated.

You want to start a project? Please fill this short form to be in contact with TAPE team

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MCKNIGHT FOUNDATION

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