

NGO «RUKH Global»

hello@rukhh.global
www.rukhh.global

Company ID: 46294025
Legal address: Ukraine, 08290,
Kyiv Region, Bucha District,
Hostomel, 12A Patriotiv St.



APPROVED
by the decision of the Management Board
of NGO "RUKH Global"
Minutes No. 3 dated "17" April 2026



Chairman of the Management Board

Igor DUDKA

Executive Director

Maryna MAKHOTA

INSTRUCTION ON TARGET AUDIENCE NEEDS ASSESSMENT OF NON-GOVERNMENTAL ORGANIZATION "RUKH GLOBAL"

Version: 1.0

Effective date: 17 April , 2026

Next review: April 2028 (or upon change of legal basis / donor requirements)

Responsible for maintenance: Executive Director, M&E Officer

Approved by: Management Board of NGO "RUKH Global"



1. General Provisions

1.1. This Target Audience Needs Assessment Instruction (hereinafter — the Instruction) establishes a unified procedure for planning, organizing, and conducting needs assessments of target audiences (beneficiaries, stakeholders) of the Non-governmental organization "RUKH Global" (hereinafter — the Organization or RUKH) within the scope of ongoing activities and project work.

1.2. The Instruction has been developed on the basis of clause 3.1 of the Charter of NGO "RUKH Global", which defines the purpose of the Organization as "building a global ecosystem of Ukrainian identity, developing innovative cultural and digital products, supporting artists, integrating the Ukrainian cultural code into the global space, and protecting the interests of the Ukrainian community worldwide", and clauses 3.2.1–3.2.7 of the Charter (areas of activity), which directly provide for work with end users of digital platforms, participants in international cultural projects, veterans and persons affected by war, members of the Organization, and partners.

1.3. The purpose of the Instruction is to ensure:

- relevance and appropriateness of RUKH's activities to the actual needs of target audiences;
- the "do no harm" principle in all forms of communication with communities affected by war, displacement, and traumatic events;
- Accountability to Affected Populations (AAP) in accordance with the Core Humanitarian Standard;
- an evidence base for developing the Theory of Change, baseline indicators, KPIs, and donor reporting;
- compliance with the requirements of EU donors (EU Better Regulation Guidelines — stakeholder consultation), UN agencies (IASC Operational Guidance), and private foundations regarding beneficiary participation in program design and evaluation.

1.4. The Instruction applies to:

- staff employees of the Organization (project managers, programme coordinators, M&E Officer, Researcher, communications team);
- contractors, external experts, and researchers engaged by the Organization;
- volunteers participating in field data collection;
- members of the Management Board and the Board of the Organization (in accordance with clause 6.1 of the Charter) — with respect to approval of key assessment outcomes.

1.5. A target audience needs assessment is a mandatory stage:

- prior to submitting any grant application exceeding EUR 50,000 (EU, UN, private foundations);
- prior to launching a new area of activity or a new programme;
- in the event of a material change of context (military escalation, change of the legal regime of stay of the Ukrainian diaspora in EU countries, migration wave, change of donor priorities);
- at least once every two years for each ongoing programme of the Organization.

1.6. This Instruction is aligned with the Monitoring, Evaluation and Reporting Policy (Document No. 2 of the package), the Personal Data Processing and Protection Regulation (Document No. 10), the PSEAH Policy (Document No. 3), and the Code of Conduct (Document No. 14) of NGO "RUKH Global".

2. Legal Basis

2.1. The Instruction has been developed in accordance with:

2.1.1. Ukrainian Legislation

- Law of Ukraine No. 4572-VI of 22 March 2012 "On Public Associations" (in the wording as of 03.09.2024) — in particular, Article 21 (rights of public associations) and Article 23 (financial support and reporting);
- Law of Ukraine No. 2297-VI of 01 June 2010 "On Personal Data Protection" — regarding the processing of respondents' personal data, the principles of minimization, purpose limitation, and storage periods;
- Law of Ukraine No. 2657-XII "On Information" — regarding the right of access to information and restrictions on its dissemination;
- Charter of NGO "RUKH Global", approved by the Decision of the Founding Assembly, Minutes No. 1 dated 12 February 2026, in particular clauses 3.1, 3.2.1–3.2.7, 5.3–5.6.

2.1.2. European Union Law

- General Data Protection Regulation (GDPR) — Regulation (EU) 2016/679 — as the regulator of the processing of personal data of persons located in EU countries (Ukrainian diaspora in Poland, Germany, and other EU countries);
- EU Better Regulation Guidelines (SWD(2021) 305 final) and Toolbox No. 53 "Stakeholder Consultation" — as the framework for planning consultations with stakeholders;
- Regulation (EU, Euratom) 2024/2509 of 23 September 2024 (Financial Regulation) — requirements for stakeholder consultations within EU grant programmes.

2.1.3. International Standards

- Core Humanitarian Standard on Quality and Accountability (CHS) — in particular Commitment 1: "Communities and people affected by crisis receive assistance appropriate and relevant to their needs";
- ISO 20252:2019 Market, opinion and social research, including insights and data analytics — requirements for the planning, collection, analysis of data, and reporting of research;
- ISO 26362 (now integrated into ISO 20252) — access panels for social research;
- IASC Operational Guidance on Community Based Complaint Mechanisms (2016) — requirements for feedback and complaints from beneficiaries;
- Sphere Handbook (2018) — humanitarian assistance standards, in particular the "Core Standards" section;
- INGO Accountability Charter / Accountable Now — principles of transparency, stakeholder participation, feedback loops;
- ESOMAR International Code on Market, Opinion and Social Research — ethical requirements for research practice;
- UNICEF Procedure for Ethical Standards in Research, Evaluation, Data Collection and Analysis (2021) — especially for research involving children and youth.

3. Key Terms

For the purposes of this Instruction, the following terms shall apply:

Term	Definition
Needs Assessment	A systematic process of collecting and analysing information about the current state, problems, expectations, and resources of a target audience in order to identify the gap between the existing situation and the desired state.
Target Audience / Beneficiaries	A group of persons or organizations at which the activities, services, or products of the Organization are directed and which derives direct benefit from such activities.
Theory of Change (ToC)	A logic model describing how and why expected changes in the target audience will occur as a result of the Organization's activities; it establishes causal links between inputs, activities, outputs, and long-term impact.
Baseline Study	A "zero-point" study — measurement of indicators of the target audience state prior to the intervention, against which changes will be assessed.
AAP (Accountability to Affected Populations)	An approach that places the dignity, rights, voice, and choice of the people receiving assistance at the centre; based on information, participation, feedback, and complaints.
Do-No-Harm	The principle that the Organization's activities (including research) must not exacerbate conflict, re-traumatize participants, or expose them to additional risks.
Trauma-Informed Approach	An approach that takes into account the prevalence of traumatic experience among the target audience (war, displacement, losses) and ensures safety, trust, choice, control, and avoidance of re-traumatization.
Informed Consent	A voluntary, informed, documented consent of a participant to take part in research after being provided with full, comprehensible information about the purpose, procedures, risks, and the participant's rights.
Desk Research	Secondary research — analysis of already existing (secondary) sources: reports, statistics, academic publications, media, social networks.
Primary Research	Collection of original data directly from respondents (surveys, interviews, focus groups).

Triangulation	Combining at least three different sources, methods, or researchers for the verification of findings.
Validation Workshop	An event at which research results are returned to representatives of the target audience for verification, clarification, and joint interpretation.

4. Target Audiences of NGO "RUKH Global"

4.1. In accordance with clauses 3.1–3.2.7 of the Charter, the Organization works with the following principal target groups:

Group	Characteristics and specificity
4.1.1. Ukrainian diaspora in Poland and the EU	Ukrainians who left before or after the full-scale invasion by Russia and reside under temporary protection status, a residence permit, or citizenship of an EU country. Specificity: linguistic (Polish/German/English plus Ukrainian), legal (Temporary Protection Directive 2001/55/EC regime), socio-cultural (integration into host communities).
4.1.2. Internally displaced persons (IDPs) in Ukraine	Citizens forcibly displaced from combat areas, temporarily occupied territories, and front-line regions. Specificity: frequently associated with traumatic experience, material losses, disorientation, and need for documents/housing/employment.
4.1.3. Displaced persons abroad	Ukrainians with refugee or temporary protection status in the EU and beyond. Specificity: dual jurisdiction, integration needs, risk of secondary traumatization.
4.1.4. Ukrainian youth (aged 14–35)	Including students, Erasmus+ beneficiaries, and youth leaders. Specificity: digital nativity, expectation of interactive engagement, sensitivity to branding.
4.1.5. Artists, cultural figures, creative industries	Visual artists, musicians, directors, designers, authors. Specificity: need for professional recognition, market opportunities, grant support (Creative Europe), and copyright protection.
4.1.6. Civil society activists	Leaders of NGOs, volunteer initiatives, advocacy campaigns. Specificity: networked, experienced, in need of methodological support and connections.
4.1.7. Veterans and persons affected by war	Combatants, family members of the fallen, civilian population that has experienced shelling, occupation, or captivity. Specificity: high likelihood of PTSD; heightened vulnerability; particular attention to the trauma-informed approach (clause 3.2.5 of the Charter — rehabilitation-through-arts programmes).
4.1.8. Members of the Organization	Active and associate members in accordance with clauses 4.3–4.4 of the Charter. Specificity: internal audience; needs assessment through the General Meeting, surveys, communication channels.
4.1.9. Partners of the Organization	Legal entities of private or public law (clause 4.12 of the Charter) — universities, municipalities, media, NGOs. Specificity: needs in a B2B format — joint projects, methodological transfer.

4.2. For each project, the primary and secondary target audiences shall be identified. Their list is recorded in the Research Protocol (Annex A).

4.3. When working with minors (under 18 years of age) or particularly vulnerable groups (veterans with PTSD, families of the fallen, victims of conflict-related sexual violence), enhanced protection procedures apply, as provided for by the PSEAH Policy (Document No. 3) and clause 8 of this Instruction.

5. When a Needs Assessment is Conducted

5.1. A target audience needs assessment is conducted in the following circumstances:

Trigger	Type of assessment	Timeline
Development of a new programme / new area of activity	Comprehensive Needs Assessment	2–4 months prior to launch
Submission of a grant application exceeding EUR 50,000	Rapid Needs Assessment + desk research	at least 4 weeks before the application deadline
Review of an existing RUKH programme	Update Assessment	every 2 years

Material change of context (escalation of war, change of EU migration legislation, new crisis)	Rapid Assessment	within 2–6 weeks after the event
Donor request within the framework of reporting	Targeted Assessment	in accordance with the donor's reporting plan
Development of the Theory of Change / update of the Organization strategy	Baseline + Strategic Foresight	once every 3–5 years
Introduction of a new digital product (platform, application — clause 3.2.1 of the Charter)	User Research + Usability Study	at the discovery and MVP stages

5.2. The decision to conduct an assessment is taken by the Executive Director upon the submission of the responsible Project Manager or M&E Officer. In the case of strategic assessments (baseline, update of the Theory of Change), the decision is agreed with the Management Board of the Organization in accordance with clause 5.4.4 of the Charter.

6. Types of Needs Assessment

6.1. Desk Research

Analysis of secondary sources: reports of UN OCHA, IOM, UNHCR, ZOI, CEDOS, CEIAS, Razumkov Centre, Ukrinform, EUROSTAT, national statistics services of host countries, academic publications, media, social-network analytics. Duration: 1–3 weeks. Always used as the first stage.

6.2. Primary Research

Collection of original data from representatives of the target audience through surveys, interviews, focus groups, and observation. Duration: 4–12 weeks. Requires a Protocol, a budget, ethical review, and researcher training.

6.3. Rapid Needs Assessment

Conducted within tight timeframes (2–4 weeks) when a full-scale study is not feasible. Combines key informant interviews (6–10 experts), an online survey (100–300 respondents), and social-network analysis. Minimum output — an orientational map of problems and priorities.

6.4. Comprehensive Needs Assessment

A full-scale study using mixed methods (quantitative plus qualitative), a large sample (500+ respondents for the quantitative component; 6–8 focus groups for the qualitative component), triangulation, and validation workshops. Duration: 3–6 months. Mandatory prior to the launch of strategic programmes and for large EU grants.

6.5. User Research (for digital products)

A specialized type applied when developing the RUKH digital platform (clause 3.2.1 of the Charter). Includes user interviews, personas, journey maps, usability testing, A/B tests. Conducted iteratively at all stages of product development.

7. Data Collection Methods

7.1. Quantitative Methods

- Structured online surveys via Google Forms, Typeform, LimeSurvey, KoBoToolbox (recommended for humanitarian contexts — works offline, complies with UN OCHA standards);
- CATI (Computer-Assisted Telephone Interviewing) telephone surveys — for IDPs without stable Internet access;
- Paper-based surveys — for groups with limited access to technology (older age, rural areas, humanitarian contexts);
- Secondary analysis of statistical data: EUROSTAT, Ukrstat (State Statistics Service of Ukraine), the Ministry of Social Policy, the State Migration Service of Ukraine, Urząd do Spraw Cudzoziemców (Poland), BAMF (Germany);
- Social media analytics (social listening) — Brand24, Meltwater, YouScan, Semantrum — to identify themes, sentiments, and problems in public discourse.

7.2. Qualitative Methods

- In-depth interviews (IDI) — 45–90 minutes, 15–30 respondents per study; used for understanding motivations, experiences, and lived realities;
- Key Informant Interviews (KII) — interviews with experts, opinion leaders, and representatives of host countries;

- Focus Group Discussions (FGD) — 6–10 participants, 90–120 minutes; 4–8 groups per study; used to identify social norms and group dynamics;
- Narrative interviews — collection of stories, especially from veterans and their families; a trauma-informed approach is mandatory;
- Observation (structured and unstructured) — at RUKH events, in public spaces of the diaspora;
- Ethnographic methods — prolonged participant observation (1–6 months) in the life of a community; applied to in-depth cultural studies;
- Case studies — in-depth analysis of a single community / organization.

7.3. Participatory Methods

- Community Mapping — joint mapping of resources, problems, and assets of the community with the audience's representatives;
- Participatory Ranking — ranking of needs by participants themselves according to importance;
- Problem Tree Analysis — joint identification of causes, manifestations, and consequences of a problem;
- World Café — a moderated structured discussion in the format of several thematic tables;
- Photovoice — participants document their experiences and needs with photographs; the facilitator supports reflection;
- Co-design workshops — joint development of solutions with beneficiaries.

7.4. Method Selection

Methods shall be selected in relation to specific research questions on the basis of a mixed-methods principle. The recommended minimum configuration for a comprehensive assessment: desk research + online survey ($n \geq 300$) + 4–6 focus groups + 10–15 in-depth interviews + 1 validation workshop.

8. Ethical Requirements

8.1. All RUKH Global research is conducted with unconditional adherence to the following ethical principles:

8.1.1. Informed Consent

- Each participant shall receive an Information Sheet in Ukrainian (or in a language the participant understands) stating: the purpose of the research, the procedure, the expected time commitment, risks and benefits, the participant's rights, contacts of the researcher and the DPO, and the data protection procedure;
- Consent shall be recorded in writing (signature on a paper form, electronic signature, checkbox on an online form) or in an audio recording (for telephone interviews);
- Template — Annex B.

8.1.2. Voluntary Participation

- Participation shall always be voluntary;
- No coercion, direct or indirect pressure shall be permitted;
- No conditional link shall exist between participation in the research and receipt of the Organization's services;
- A participant has the right to decline to answer any question and to withdraw from participation at any time without stating reasons and without consequences.

8.1.3. Confidentiality and Anonymity

- Personal data (full name, contact details) shall be stored separately from the content of interviews/questionnaires;
- Pseudonyms or generalized descriptors (sex, age, region) shall be used in the report;
- Direct quotations shall be published only with the participant's additional explicit consent;
- Files shall be password-protected and transmitted via encrypted channels.

8.1.4. Trauma-Informed Approach

- Direct questions about traumatic experience shall not be asked unless this is the key objective of the research;
- Participants shall not be pressed to disclose details of trauma if they do not wish to do so;
- A safe, quiet, and private environment for the conversation shall be created;
- A list of psychological support services shall be kept readily available (Lifeline Ukraine 7333, 116 123, national psychological hotlines of EU countries) and provided to each participant;
- Researchers shall complete basic training in trauma-informed interviewing;

- At the first signs of acute distress — the interview shall be stopped immediately, support shall be provided, and information about professional assistance shall be communicated.

8.1.5. GDPR and Law of Ukraine No. 2297-VI Compliance

- Data minimization principle — only the necessary minimum shall be collected;
- Purpose limitation — data shall be used only for the declared purposes;
- Storage limitation — personal data shall be destroyed or anonymized within 3 years after the completion of the project (or earlier, where reporting obligations permit);
- Data subjects' rights: access, rectification, erasure, objection to processing — shall be implemented through the Data Protection Officer (DPO) of the Organization (dpo@rukh.global);
- For cross-border data transfers between Ukraine and the EU, Standard Contractual Clauses or other grounds under GDPR Articles 44–50 shall apply.

8.1.6. Child Protection

- For the involvement of minors (under 18) — written parental/guardian consent is mandatory;
- In addition, the child's assent shall be obtained in a language appropriate to the child's age;
- Child-friendly methods: drawing, game-based formats, age-adapted questions;
- The presence of a second adult (safeguarding presence) during interviews with a child;
- All researchers working with children shall complete Safeguarding induction (PSEAH Policy, Document No. 3) and submit a Declaration of Good Character.

8.1.7. Conflict of Interest

A researcher is obliged to declare any potential or actual conflict of interest (family/friendship ties with respondents, financial interest) before the start of the field phase. See Document No. 13 Anti-fraud and Conflict of Interest Policy.

9. Sampling

9.1. The sampling strategy is selected in relation to the research questions and resources:

Type of sample	When applied	Example for RUKH
Purposive	When specific profiles of respondents are required	Interviews with 12 leaders of diaspora NGOs in Poland
Snowball	For "hidden" or network communities	Veteran communities, displaced artists
Stratified	When representation of subgroups must be ensured	Diaspora survey: stratification by country of residence (PL/DE/UK), time of arrival, age
Random	Where a complete sampling frame is available	Survey among Organization members via the database
Convenience	For a rapid assessment with constraints	Survey of participants at a RUKH event; flagged as a limitation
Quota	When the proportions of the general population must be preserved	Survey of 300 IDPs with quotas by sex, age, region of displacement

9.2. Minimum recommended sample sizes for RUKH:

- Quantitative online survey: $n \geq 300$ to ensure a confidence interval of $\pm 5\%$ at 95% confidence;
- Focus groups: 4–8 groups per study, until data saturation is achieved;
- In-depth interviews: 15–25, until theoretical saturation is achieved (typically 12 is sufficient for a homogeneous group);
- KII: 6–12 experts per study.

10. Research Instruments

10.1. The Organization uses standardized templates of instruments, which are adapted to each specific study:

- Research Protocol template — Annex A;
- Informed Consent Form template (in Ukrainian) — Annex B;
- Interview guide template — Annex C;

- Survey questionnaire template — Annex D;
- Focus-group Discussion Guide template — integrated in Annex C;
- Ethical checklist — Annex F.

10.2. Recommended technology stack:

- Surveys: KoBoToolbox (free, offline-friendly), Google Forms, Typeform;
- Interview recording: Zoom / Google Meet / MS Teams with explicit consent; Otter.ai / Good Tape for transcription;
- Qualitative analysis: ATLAS.ti, NVivo, MAXQDA, or the free Taguette;
- Quantitative analysis: SPSS, R, Jamovi (free), Microsoft Excel with the Real Statistics add-in;
- Visualization: Tableau Public, Flourish, Datawrapper;
- Project management: Monday.com, Airtable.

10.3. The choice of instruments shall be aligned with the Organization's IT and Information Security Policy and shall comply with the GDPR (EU servers, DPA contracts with suppliers).

11. Data Analysis

11.1. Quantitative Analysis

- Descriptive statistics: frequencies, medians, means, standard deviations;
- Inferential statistics: chi-square, t-test, correlation analysis — depending on the design;
- Audience segmentation (cluster analysis);
- Checks of missing data and quality controls (outliers, straight-lining).

11.2. Qualitative Analysis

- Coding (open → axial → selective coding) following the grounded theory methodology or thematic analysis (Braun & Clarke);
- Construction of thematic maps;
- Use of cross-case analysis for comparison of cases;
- Intercooder reliability — at least two coders independently process 10–20% of the data with a consistency check.

11.3. Triangulation

Triangulation is mandatory across methods (quantitative plus qualitative), sources (beneficiaries plus partners plus experts), and researchers (a minimum of two persons per analysis). Its purpose is to enhance the validity of findings.

11.4. Bias Mitigation

The researcher shall document in the report potential biases: confirmation bias, social desirability bias, selection bias — and shall describe how they have been mitigated.

12. Validation of Results with the Target Audience

12.1. Following preliminary analysis, the Organization holds a Validation Workshop — an event at which preliminary findings are returned to representatives of the target audience for:

- verification of the accuracy of conclusions (whether the researchers have correctly understood the problems);
- additional interpretation and context;
- joint identification of action priorities.

12.2. Format of the validation workshop: 2–3 hours, 8–15 participants, moderation, visualized findings (charts, maps, quotations), a priority-voting session.

12.3. On the basis of the validation workshop results, a separate minute is drawn up, and the findings are integrated into the final report.

12.4. The AAP (Accountability to Affected Populations) principle requires that results be returned to the community in an accessible format — a short report of 2–4 pages, infographics, social media, events.

13. Research Stages

Stage	Content	Indicative duration
13.1. Protocol	Development of objectives, research questions, methods, sample, instruments, budget, ethical plan, timeline. Approval by the Executive Director and (where required) by the Management Board.	2–3 weeks
13.2. Pilot	Testing of instruments with 5–10 respondents. Refinement of wording, time management, researcher training.	1–2 weeks
13.3. Field Work	Data collection: surveys, interviews, focus groups, observation. Quality monitoring (supervision, spot-checks, back-checks).	4–12 weeks
13.4. Analysis	Transcription, coding, statistics, triangulation, identification of patterns and findings.	3–6 weeks
13.5. Validation	Validation workshop; clarification of findings; integration of community feedback.	1–2 weeks
13.6. Report	Preparation of a full report (20–60 pages), executive summary (2–4 pages), presentation.	2–3 weeks
13.7. Dissemination	Publication on rukh.global, distribution to partners, social media, presentation events, infographics. Communication plan — Annex G.	2–4 weeks

14. Research Report

14.1. The final report has the following structure:

- Executive Summary (2–4 pages) — key findings, recommendations, methodology;
- Introduction — context, rationale for the research;
- Methodology — approach, methods, sample, ethics, limitations;
- Findings — key results, organized by theme, supported by data (quotations, figures, tables, charts);
- Discussion / Analysis — interpretation in the context of literature and RUKH's strategy;
- Recommendations — SMART recommendations divided into short-term, medium-term, and long-term;
- Limitations — limitations of the research;
- Annexes — instruments, detailed data, list of respondents (anonymized).

14.2. The full structure of the report — Annex E. The report is prepared in Ukrainian; for donor purposes, an English-language summary is prepared.

15. Roles and Responsibilities

15.1. Allocation of roles under the RACI matrix (R — Responsible, A — Accountable, C — Consulted, I — Informed):

Function	Researcher	Project Manager	M&E Officer	Executive Director	Management Board
Protocol development	R	C	A	I	I
Protocol approval	I	C	C	A/R	I
Field work	R	A	C	I	I
Data analysis	R	C	A	I	I
Validation workshop	R	A	C	I	I
Report preparation	R	C	A	I	I
Report approval	I	C	C	A/R	C
Dissemination of results	C	R	C	A	I
Ethics review	C	I	A/R	C	I
Strategic assessments (baseline, ToC)	R	C	A	C	A/R

15.2. The Organization appoints a Data Protection Officer (DPO, dpo@rukh.global), to whom researchers shall refer for advice on GDPR compliance.

16. Data Storage and Destruction

16.1. Personal data (full name, contact details, voice recordings, identifying metadata) shall be stored in the Organization's password-protected repository (corporate Google Workspace / Microsoft 365 with MFA; EU-based servers).

16.2. Retention periods:

- Respondents' personal data: no longer than 3 years after the completion of the project;
- Anonymized datasets: may be retained indefinitely for secondary analysis and comparative studies;
- Informed Consent forms: retained for 5 years after the completion of the research as documentation;
- Reports: retained indefinitely in the Organization's archive.

16.3. Upon expiry of the retention period, data shall be either anonymized (irreversible anonymization) or destroyed (secure deletion). The procedure shall be recorded in a data-destruction act signed by the M&E Officer and the DPO.

16.4. In the event of a data-security incident (data breach) — notification shall be submitted to the Ukrainian Parliament Commissioner for Human Rights and (where required) to the relevant EU authorities within 72 hours, in accordance with GDPR Article 33.

17. Responsibility

17.1. Responsibility for compliance with this Instruction rests with:

- the Executive Director — for overall oversight, approval of protocols and reports;
- the M&E Officer — for methodological correctness, ethical review, quality of analysis;
- the Project Manager — for the organization of field work, budget control, and adherence to deadlines;
- the Researcher — for the accuracy of data collection, adherence to ethical principles, and the quality of the report;
- the Data Protection Officer — for GDPR compliance and data security.

17.2. A breach of the provisions of this Instruction entails disciplinary liability of employees (in accordance with the Labour Code of Ukraine and the employment contract), contractual liability of contractors, and — in the event of gross breaches of ethical principles (in particular, consent, child protection, confidentiality) — may serve as grounds for the termination of employment / civil-law relations.

17.3. Channels for reporting violations (whistleblowing):

- email: whistleblowing@rukh.global;
- by postal address of the Organization, marked "Confidential. To the Chairman of the Management Board";
- anonymous form on the official website of the Organization.

17.4. The Organization guarantees the protection of persons who have reported violations, in accordance with the Law of Ukraine No. 1700-VII "On Prevention of Corruption" and the internal Whistleblowing Policy.

18. Final Provisions

18.1. This Instruction enters into force from the moment of its approval by the Management Board of NGO "RUKH Global" and signing by the Chairman of the Management Board.

18.2. The Instruction shall be reviewed at least once every two years. An extraordinary review shall be conducted in the following cases:

- changes in the legislation of Ukraine in the field of personal data protection or the legal regime of public associations;
- changes to the GDPR, the EU Financial Regulation, or the requirements of key donors;
- material changes to the Charter of NGO "RUKH Global";
- ethical incidents identified in research;
- updates to the Core Humanitarian Standard, ISO 20252, and other relevant standards.

18.3. All amendments to this Instruction shall be approved by a decision of the Management Board of the Organization.

18.4. In cases not regulated by this Instruction, the norms of the applicable legislation of Ukraine, the Charter of NGO "RUKH Global", other internal policies of the Organization, and the relevant international standards shall apply.

18.5. The Instruction shall be available to all employees, contractors, volunteers, and partners of the Organization through the corporate document repository. A brief overview of the Instruction is included in the onboarding package for new employees.

19. Mapping to Donor Requirements

Provision of the Instruction	Donor / standard requirement
clauses 1.3, 12 — AAP, do no harm, validation workshop	Core Humanitarian Standard, Commitments 1–4
clause 8 — ethical requirements, informed consent	ISO 20252:2019; ESOMAR Code; UNICEF Ethical Standards (2021)
clauses 2.1.2, 8.1.5, 16 — GDPR and Law of Ukraine No. 2297-VI	GDPR EU 2016/679; Law of Ukraine No. 2297-VI
clauses 5, 13 — stakeholder consultations	EU Better Regulation Guidelines, Toolbox No. 53; EU FR 2024/2509
clause 11.3 — triangulation, ISO-based analysis	ISO 20252:2019; OECD-DAC Quality Standards
clause 17.3 — whistleblowing channels	2 CFR 200.217; Law of Ukraine No. 1700-VII
clause 8.1.6 — child protection	UN CRC; UNICEF Child Protection Standards; RUKH Safeguarding policy
clause 8.1.4 — trauma-informed approach	IASC MHPSS Guidelines; Sphere Handbook

Annex A. Research Protocol Template

Protocol structure:

- Title of the research and document version
- Performers: Principal Investigator, team, contractors
- Dates: start, principal milestones, final report
- Context and rationale (why is it needed)
- Research purpose
- Research questions — 3–7 items
- Target audience and inclusion/exclusion criteria
- Methodology (desk + primary, mixed methods)
- Sample: type, size, strategy
- Instruments (links to annexes)
- Field plan: dates, regions, team
- Ethical plan: informed consent, trauma-informed, child protection
- Data management plan
- Analytical plan
- Validation workshop: date, participants
- Budget
- Risks and mitigation
- Expected deliverables
- Signatures: Researcher, PM, M&E Officer, Executive Director

Annex B. Informed Consent Form (template)

INFORMED CONSENT FORM FOR PARTICIPATION IN RESEARCH

Research title: _____

Organizer: Non-governmental organization "RUKH Global", USREOU code 46294025, rukh.global, hello@rukh.global

Researcher / contact person: _____

DPO (Data Protection Officer): dpo@rukhh.global

1. About the research

The purpose of the research is _____. The results will be used for the development of RUKH Global programmes and policies and may also be published in a report on rukhh.global.

2. Your participation

Participation is entirely voluntary. The interview / survey will last approximately _____ minutes. You may decline to answer any question or withdraw at any time without stating reasons and without any adverse consequences for you.

3. Risks and benefits

Risks are minimal. Some questions may touch on difficult topics. If you feel a need for psychological support, you may contact Lifeline Ukraine 7333 or the international line 116 123. Participation entails no direct financial benefit.

4. Confidentiality

Your personal data (full name, contact details) will be stored separately from your responses. Only anonymized data will be used in the report. Direct quotations — only with your separate consent.

5. Processing of personal data

The processing of data is carried out in accordance with the Law of Ukraine No. 2297-VI "On Personal Data Protection" and the GDPR (EU 2016/679). You have the right to access, rectification, erasure, and restriction of processing. Personal data shall be retained for no longer than 3 years after the completion of the project, after which they shall be destroyed or anonymized.

6. Consent

I have read and understood the information provided. I voluntarily agree to take part in this research.

☐ Yes, I consent to participate in the interview/survey

☐ Yes, I consent to an audio recording

☐ Yes, I consent to the use of my direct quotations in anonymized form

Full name: _____

Date: "____" _____ 2026 Signature: _____

Annex C. Interview Guide (template)

Block 1. Opening (5 min)

- Introduction of the researcher, purpose, emphasis on voluntariness
- Verification of consent, permission to record
- Warm-up: "Tell me briefly about yourself"

Block 2. Context (10 min)

- Tell me about your current life context
- What are the main challenges you are currently experiencing?

Block 3. Key research questions (30–60 min)

- [Adapted to the research: a series of open questions with probes]
- Probes: "Can you tell me more?", "Why is this important to you?", "Give an example"

Block 4. Needs and priorities (15 min)

- What are the three most important needs you feel?
- What kind of support would you like to receive?
- What would an ideal scenario look like in one year?

Block 5. Closing (5 min)

- "Is there anything important that we have not discussed?"
- Thanks, explanation of next steps
- Information on psychological support (if relevant)

Annex D. Survey Questionnaire (template)

Questionnaire structure:

- Introduction + consent (checkbox)
- Socio-demographic block: age (ranges), sex, country of residence, region of origin, time of arrival, residence status, education, employment
- Main block: 10–20 questions (Likert 1–5, multiple choice, ranking)
- Open questions (2–3): "What would you like to add?"
- Contact block (optional): email for feedback, consent to further participation
- Thanks

Recommended length: 10–20 minutes. Adaptive logic (skip logic) — to reduce respondent burden. Pilot testing with 5–10 respondents.

Annex E. Research Report (structure)

- Title page — title, authors, date, version
- Foreword (Executive Director / Principal Investigator)
- Table of contents
- List of abbreviations
- Executive Summary (2–4 pp.)
- 1. Introduction: context, rationale, significance for RUKH
- 2. Methodology: approach, methods, sample, ethics, limitations
- 3. Literature review / Desk Research findings
- 4. Findings (by theme, with quotations and visualization)
- 5. Discussion / Analysis
- 6. Recommendations (short / medium / long-term; SMART)
- 7. Implications for RUKH Strategy / Theory of Change
- 8. Limitations
- 9. Conclusions
- Bibliography / sources
- Annexes: instruments, characteristics of respondents (anonymized), calculation tables

Annex F. Ethical Checklist

To be checked BEFORE the start of field work:

- ☐ Approved Research Protocol
- ☐ Informed Consent Form developed in Ukrainian and (where relevant) in the language of the country of residence
- ☐ All researchers have undergone a briefing on ethics and trauma-informed interviewing
- ☐ All researchers have signed an NDA and the Code of Conduct
- ☐ DPO and reporting channel identified
- ☐ A procedure for children is provided (parental consent + assent + child-friendly methods)
- ☐ A list of psychological support services in Ukrainian is prepared
- ☐ A safe and private environment for interviews is organized
- ☐ Data Management Plan — where the data are stored, who has access, for how long, how they are destroyed
- ☐ Risk Assessment — potential risks for participants and the team

- [] Plan for feedback to participants (validation + dissemination)
- [] Conflict-of-interest declarations from researchers
- [] GDPR compliance — DPA with contractors, EU-based server services
- [] Incident response plan (psychological crisis, data breach, conflict in the group)

Annex G. Communication Strategy Template for Research Results

Dissemination plan:

Audience	Format	Channel	Timeline
Research participants	Short report 2–4 pp. + infographics	Email, SMS, messaging apps	Within 4 weeks of completion
Target audience at large	Public report, infographics, posts	rukhh.global, Facebook, Instagram, Telegram	1–2 months after completion
Donors	Executive Summary + Full Report (EN)	Email, donor's portal	In accordance with the reporting plan
NGO partners	Full report + working meeting	Email + online meeting	1 month after completion
Public authorities (Ukraine, EU)	Policy brief 4–6 pp.	Letter + personal meetings	2 months after completion
Media	Press release + headline findings	Email distribution, press conference	2–3 weeks after completion
Academic community	Working papers / scholarly article	Conferences, scholarly publications	3–6 months after completion

Communication principles:

- Prioritize the community — participants receive the results first
- Use accessible language (minimum jargon)
- Visualization — infographics, maps, quotations
- Multilingualism — Ukrainian mandatory; English / Polish / others — by audience
- Ethics — preserve anonymity, do not publish data that would allow identification of respondents