SHAPING
INCLUSION

A practical booklet to help National Agencies
(Inclusion Officers) approach inclusion in
a strategic way

INCLUSION FOR ALL!
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RESOURCE CENTRE

Education and Culture

SHAPING
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Education and Culture

SALTO-YOUTH STANDS FOR...

…'**S**upport and **A**dvanced **L**earning and **T**raining **O**pportunities within the Youth in Action programme'. The European Commission has created a network of eight SALTO-YOUTH Resource Centres to enhance the implementation of the European Youth in Action programme which provides young people with valuable non-formal learning experiences.

SALTO's aim is to **support European Youth in Action projects** in priority areas such as European Citizenship, Cultural Diversity, Participation and Inclusion of young people with fewer opportunities, in regions such as EuroMed, South-East Europe or Eastern Europe and the Caucasus, with Training and Cooperation activities and with Information tools for National Agencies.

In these European priority areas, SALTO-YOUTH provides **resources, information and training** for National Agencies and European youth workers. Several resources in the above areas are available on **www.SALTO-YOUTH.net**. Find online the European Training Calendar, the Toolbox for Training and Youth Work, Trainers Online for Youth, links to online resources and much more…

SALTO-YOUTH actively **co-operates** with other actors in European youth work such as the National Agencies of the Youth in Action programme, the Council of Europe, the European Youth Forum, European youth workers and trainers and training organisers.

THE SALTO-YOUTH INCLUSION RESOURCE CENTRE
WWW.SALTO-YOUTH.NET/INCLUSION/

The SALTO Inclusion Resource Centre (in Belgium-Flanders) works together with the European Commission to **include young people with fewer opportunities** in the Youth in Action programme. SALTO-Inclusion also supports the National Agencies and youth workers in their inclusion work by providing the following resources:

• training courses on inclusion topics and for specific target groups at risk of social exclusion
• training and youth work methods and tools to support inclusion projects
• practical and inspirational publications for international inclusion projects
• up-to-date information about inclusion issues and opportunities via the Inclusion Newsletter
• handy commented links to inclusion resources on line
• an overview of trainers and resource persons in the field of inclusion and youth
• bringing together stakeholders to make the inclusion of young people with fewer opportunities more effective and easier

For more information and resources have a look at the Inclusion pages at:
☛ **www.SALTO-YOUTH.net/Inclusion/**

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A CHALLENGING VISION

Let's be honest. When most of us hear the word "strategy" (and more in specific "**inclusion strategy**"), we groan and roll our eyes. Given the choice, most of us would rather go to the dentist than be forced to talk about strategy. Why is that?

The word "strategy" suffers from a case of extremely **bad publicity**. For many of us, the idea of having to make a strategy conjures up images of endless discussions which seem to go nowhere and hours wasted in meetings which produce few or no concrete results.

If you have ever been involved in strategy-making, these images are probably familiar to you but it doesn't have to be this way. Developing a strategy can be a **very motivating process** (yes, really!). It can provide you or your organisation with **solid facts** which you can then use **to chart the future direction of your work**. Having a clear strategy can help shake an organisation out of its tired daily routine and provide it with a **new set of objectives** to strive for. A strategy can give your co-workers the feeling that they are doing more than just "going through the motions" and instead make them part of **a motivated team working towards concrete goals**.

Strategy-making used to be the territory of big business and commercial enterprises. However, the ongoing formalisation of the non-formal youth sector has resulted in the need for a new approach to our work (as an Inclusion Officer in a National Agency). The increasing demands placed on this sector combined with ever-shrinking financial resources means that organisations must start to take a more **strategic approach** to their work if they are to thrive and not just survive.

This is especially true for the National Agencies (NAs), and more in specific **for Inclusion Officers, of the Youth in Action programme**. The changeover from the former YOUTH programme to the current Youth in Action programme has transformed both the profile and the tasks of the NAs.
To be able to meet the requirements of the new programme, the Inclusion Officer will have **to re-define their working methods and their relationships with key stakeholders**.This is a **complex process** which will not just happen on its own. The Inclusion Officers need to take time to understand the demands of the new programme and to plan how they can best meet those demands. In short, Inclusion Officers must start to develop **strategies**.

Nowhere in the new programme is the need for strategy greater than in relation to the inclusion of young people with fewer opportunities. Despite the positive legacy of the YOUTH programme, **many challenges** still surround the topic of inclusion which Youth in Action must now try to address.

The global need for strategic thinking in Youth in Action combined with the specific challenges in the field of inclusion lead the SALTO Inclusion Resource Centre to publish this booklet.
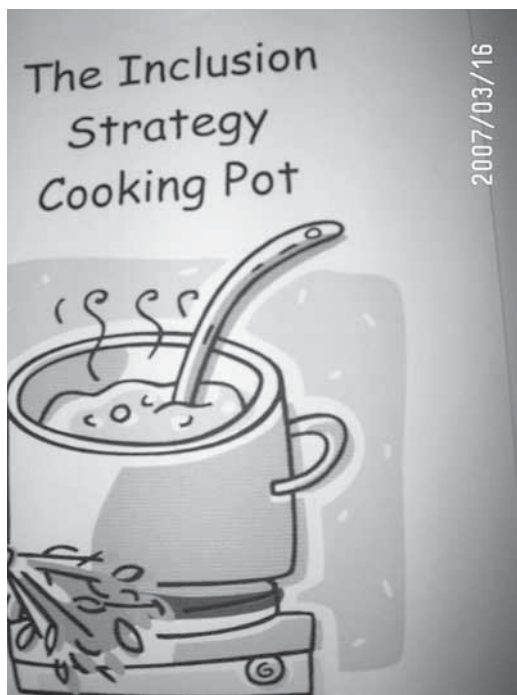
The inclusion strategy cooking pot

Rather than duplicate already-existing strategy documents, "Shaping Inclusion" **aims to simplify the theory behind strategy development in order to make it more accessible to a wider audience**. At the same time, the booklet presents **examples of how** NAs have put **strategic theory into practice** specifically **in the field of inclusion**. Many of these examples were provided by NAs during the **SALTO Round Table Meeting on Inclusion Strategy** (March 2007 – Belgium).

In this way, SALTO Inclusion hopes to help **de-mystify** the general concept of strategy and at the same time to **motivate** Inclusion Officers to take steps to develop their own inclusion strategies.

☛ You can download this booklet "**Shaping Inclusion**" for free at
www.salto-youth.net/ShapingInclusion/

JUST ANOTHER STRATEGY BOOK?

Walk into any bookstore and you will likely find shelves full of books on strategic thinking and strategy development. **So why write one more?**

For a long time strategy-making has been associated with profit-making activities. Many of the strategy books available on the market today are aimed at commercial companies. They give great advice on how to increase your profit margin, how to do market research and how to sell a product to new customers. While the basic concepts of strategy-making described in those books can be applied to many contexts, it is not always easy to see how to adapt a profit-making approach to the non-profit sector.

The good news is that the **need for strategic thinking** is becoming more accepted **in the non-formal youth sector**. More and more strategy books and documents are being developed specifically for youth organisations. These are a very good place to start but there will always be a need to take written concepts and translate them into the reality on the ground.

To date there have been few attempts to focus on the reality of National Agencies or to understand the specificities of strategy-making in their context. NAs are different from many other non-profit institutions. The profile of an NA Inclusion Officer is **multi-faceted** (programme implementer, financial manager, advisor and disseminator) and the work they are asked to do is sometimes **complex** (for instance inclusion work with its different profiles of young people and wide range of needs). These and other factors all need to be brought into balance if NAs Inclusion Officers are to do their work effectively. One way to find this balance is to encourage more strategic thinking within NAs but just promoting the concept of strategy is not enough. Inclusion Officers need advice and strategic tools which take their specialised role into account.

This booklet aims to address the unique situation of National Agencies and to demonstrate how the theoretical concepts of strategy development can be practically applied to their inclusion work within the Youth in Action programme.

Who is this booklet for?

"Shaping inclusion?" is for **Inclusion Officers** who want to know what is involved in strategy-making and strategy implementation. This booklet is aimed primarily at "newcomers" to strategy. It will examine the **basic concepts** behind strategy development and present them in a user-friendly way. By doing so, we hope to erase some of the negative stereotypes surrounding the concept of strategy, to make the idea of **strategic thinking more attractive and accessible** and to demonstrate how strategies can be developed in any context.

If you are already a strategy "veteran", many of the concepts in this booklet will probably be familiar to you. Nevertheless, we encourage you to read through the following pages. If anything is certain in the world of strategy development, it is the fact that there is always something new to learn.

YOUTH IN ACTION – NEW PROGRAMME, NEW CHALLENGES

The Youth in Action (YIA) programme was launched on January 1, 2007. At first glance, it may appear as though YIA is merely a continuation (or an expansion) of the previous YOUTH programme. But look a little closer and it quickly becomes apparent that YIA is more than just a replica of the YOUTH programme. **YIA is an exciting but challenging new step forward in European-mobility activities which will place new demands on all of the partners involved.**

Compared to the YOUTH programme, Youth in Action is **broader and more ambitious** in its scope. Youth in Action offers a wider range of activities which may be carried out in a much larger geographic area. In addition, the programme aims to increase the overall number of participants in all Actions by increasing the total number of activities per year. These are all positive developments but from the very beginning of YIA there were many questions surrounding the implementation of this highly complex programme.

From the Round Table Meeting on inclusion strategies

One of these questions concerns finances. While YIA proposes to expand the number of activities, the financial resources available are not necessarily in line with the expansion of the programme. An imbalance between high goals and insufficient resources could pose a serious challenge in the coming years. The imbalance between high goals and low resources will pose a serious **challenge** in the coming years.

Another change within YIA is the **re-definition of the position of National Agencies**. In the YOUTH programme, NAs were accountable directly to the European Commission. Now, in YIA, National Agencies are also (equally) accountable to the National Authorities in their own countries. This means that the Agencies will have to find a way to **balance the expectations and obligations** on European level with those on national level.

This new accountability is not just theoretical. In the new YIA programme, the European Commission intends to take a **more active role** in monitoring and following-up developments within the national work plans. This will likely mean that NAs will need to invest much more time in their planning and evaluations.

CHANGES TO INCLUSION

Many promoters who work directly with these youngsters felt that while the YOUTH programme successfully *included* the young people in its activities (i.e. provided access), those same activities often failed to respond to real needs. Promoters felt that the programme could also make a powerful contribution to the **social** *inclusion* of these young people.

At the launch of YIA, the **inclusion of young people with fewer opportunities** was named a **permanent priority** for the seven-year period of the programme. This in itself is no change from the YOUTH programme. However, the **European Commission (EC)** has produced a **new "Inclusion Strategy"** to be implemented in the framework of Youth in Action which responds to the wish to make the programme not just *inclusive* but also to make it a tool of *inclusion*.

☛ Take a look at the Inclusion Strategy of the European Commission at
www.salto-youth.net/InclusionStrategy/

This new Inclusion Strategy will have far-reaching implications for the inclusion work of National Agencies. Some of the **most notable changes** in the EC's Inclusion Strategy include:

- The introduction of the aim to stimulate the use of Youth in Action as **a tool to enhance social inclusion, active citizenship and employability** of young people with fewer opportunities and to contribute to **social cohesion** at large
- The introduction of the concept of **"A Inclusion" and "B Inclusion" projects** (highlighting the difference between projects which actively *include* young people with fewer opportunities vs. projects that have a thematic focus on inclusion and stressing that both are given equal importance)
- A new emphasis on the need for **dissemination and exploitation of the results** of inclusion-themed projects.

What will these changes mean?

First of all, it will no longer be enough for NAs to demonstrate that they have been inclusive (i.e. that they have ensured equal access for all young people to YIA activities). Now they must also show how **their activities make a direct contribution to social inclusion**. In addition, NAs will have to publicize and promote the positive outcomes of inclusion-themed projects. To do this, the NA (and more in specific the Inclusion Officer together with colleagues) will need to have a **better overview and understanding** of the concrete results coming out of individual projects. This means that the Inclusion Officer must manage the *quantity* of their inclusion projects/participants as well as the *quality* within those projects. To do this, they will need to define **quality standards and quality measurements**.

Taken together, these are all substantial changes which will impact NAs on many levels. Clearly there is a compelling need for NAs to take a more strategic approach to all aspects of their work and in particular to inclusion, not just to satisfy the demands of the European Commission, but in order to better meet the needs of the programme users.

WHAT IS?
STRATEGY?

Strategy: Generalship; the art of war; management of an army in a campaign; the art of moving troops, ships, aircraft... to impose conditions for fighting preferred by oneself

(The Concise Oxford Dictionary, 1979)

Inclusion strategy

Implementation phase

Evaluation phase

Planning phase

Analysis pha

The word "strategy" originates from the Greek term word *"strategia"* meaning **"generalship"** *(Nickols)*. For centuries, the word strategy has been used to describe the ways armies achieve military and political goals. More recently, in the business world, strategy is used to describe the way companies plan to market and sell their products.

At first glance, this definition may not seem very relevant in the context of the non-formal youth sector. In fact, the idea of armies and conditions for fighting seems to contradict the goals of non-formal youth work. But look again…

- Strategy involves *management* - the definition and implementation of a process
- Strategy requires *generalship* - a person or persons to lead that process
- Strategy is about *imposing conditions preferred by oneself* – steering the process in the direction you want to go instead of letting the process steer you
- Strategy is an *art* – it requires time and careful consideration. Luckily, this is an art which can be learned.

Obviously, these points are all highly relevant to non-formal youth work. We know that we need management, leadership and a course to steer by. We know how easy it is to lose control and to let situations control us rather than the other way around. A clear strategy can help provide what we need and prevent problems from cropping up.

Now hopefully your situation is not so desperate as to require troops, ships and aircraft but even if it is, keep reading. The next sections will provide advice which can help bring some order into the chaos and make your situation look less like a battlefield.

A WORKING DEFINITION OF STRATEGY

Strategy is difficult to define. Different books dealing with strategy often have their own unique definition and some don't even bother trying to define it at all. No wonder we feel so intimidated and confused!

If we are going to make the term "strategy" more user-friendly, we need to get away from complicated definitions and academic mumbo-jumbo. Strategy can be broadly conceived as a course of action for achieving a purpose *(Andrews)*. To put it as simply as possible:

> **A strategy is a statement of intent which outlines where you are today, indicates where you want to go tomorrow, and defines the steps you will take to get there.**

That doesn't sound so bad, does it? In fact, we make mini-strategies in our heads throughout the day without even knowing it. If you have ever painted your house, organised a big party, or driven your car through an unknown city, you almost certainly had to think strategically.

WHERE AM I NOW?
WHERE DO I WANT TO GO?
HOW WILL I GET THERE?

These three key questions form the basis of almost any kind of strategy-making.
It is interesting to note that this description defines strategy as a **"statement of intent"**. What precisely does that mean? Some people avoid getting involved with strategy-making because they are afraid that the final result will be an all-encompassing mega-plan which tries to control every single aspect of their work and their organisation. But this is not what strategy is all about.

A "statement of intent" is a **declaration of where you intend to go and how you intend to get there** A bad strategy tries to define every single action that will be taken by every single person in the organisation for the next five years. You can already tell that this kind of approach probably won't get far. A good strategy describes the general intention and uses that as the platform for taking action. Bear in mind that "intent" can change over time. No one knows what the future might bring. Circumstances change and when they do you might need to re-define your intent, sometimes radically. This is a normal part of strategy development.

IS MAKING A STRATEGY THE SAME AS PROJECT PLANNING?
The three key questions listed above can be applied in almost any situation, whether you are planning a wedding or developing an international aid programme for the United Nations. However, there is a subtle **difference between making a strategy and planning a project** (even a large-scale one):

- When you **plan a project**, the first step involves figuring out where you want to go and how you are going to get there.

- When you **develop a strategy**, the process is essentially the same but the range is very different. Strategies are generally designed for **a longer period**, sometimes over several years. As a result, they usually have **a much broader scope** (for instance a strategy may include many large-scale projects at once). Compared to a project, a strategy often **involves many more people** (an entire institution vs. an individual project team).

Now don't let these differences of scale intimidate you. Remember, the fundamental elements of strategy development are really no different from ordinary project planning.

THE FOUR PHASES OF STRATEGY

Each separate book or document on strategy describes their own approach to strategy development. It is easy to become confused but luckily most experts agree that in its most basic form a strategy is made up of four distinct phases:

1.
The Analysis Phase

↓

2.
The Planning Phase

↓

3.
The Implementation Phase

↓

4.
The Evaluation Phase
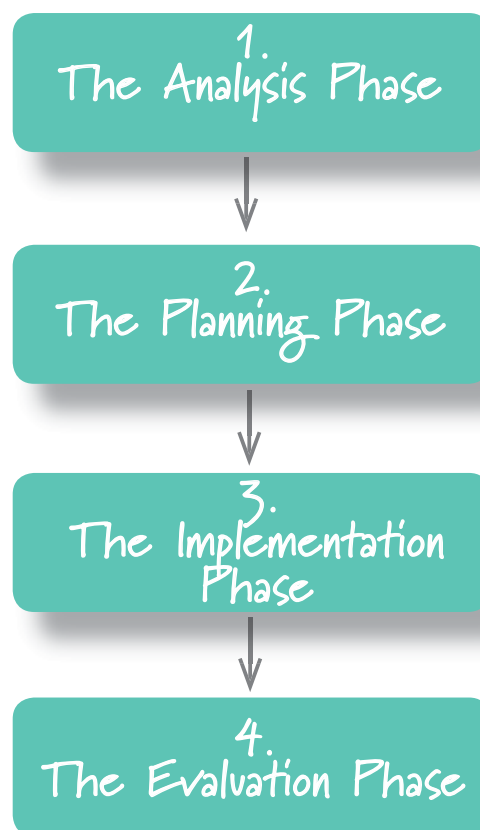
- The first phase, **Analysis**, involves taking time to understand where you (as an Inclusion Officer) are starting from. What was our situation in the past? What is our situation today?
- Once you have a clear picture of where you are starting from, you are ready to being the second phase – **Planning**. What do we want our situation to look like tomorrow? Here you start making the choices which will define your future direction.
- The third phase, **Implementation**, involves identifying the steps you will take and putting those steps into action.
- The fourth and last phase, **Evaluation**, lets you know to what extent you have or have not been successful.

☛ Each of these phases plays a vital role in a successful strategy. We will look at each of these phases in more detail in the section **"Making an inclusion strategy"** on page 24.
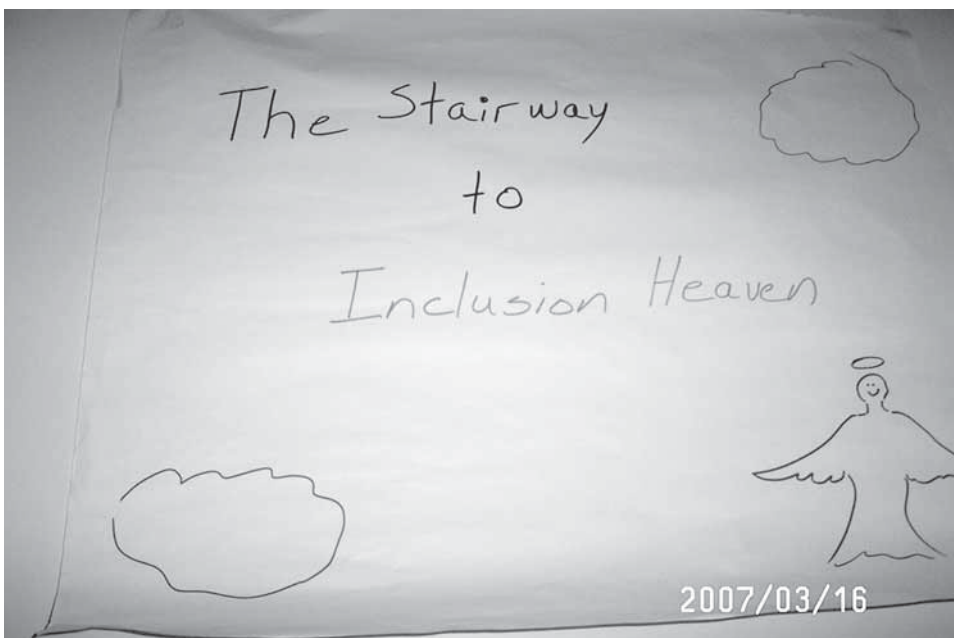
The stairway to inclusion heaven

IS STRATEGY DEVELOPMENT A LINEAR PROCESS?

On paper, strategy is a logical and linear process moving steadily from Analysis to Planning to Implementation and finally to Evaluation. In real life, however, strategy is actually much more *cyclical*.

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            1.
    The Analysis Phase

4.                              2.
The Evaluation Phase        The Planning Phase

            3.
    The Implementation
        Phase
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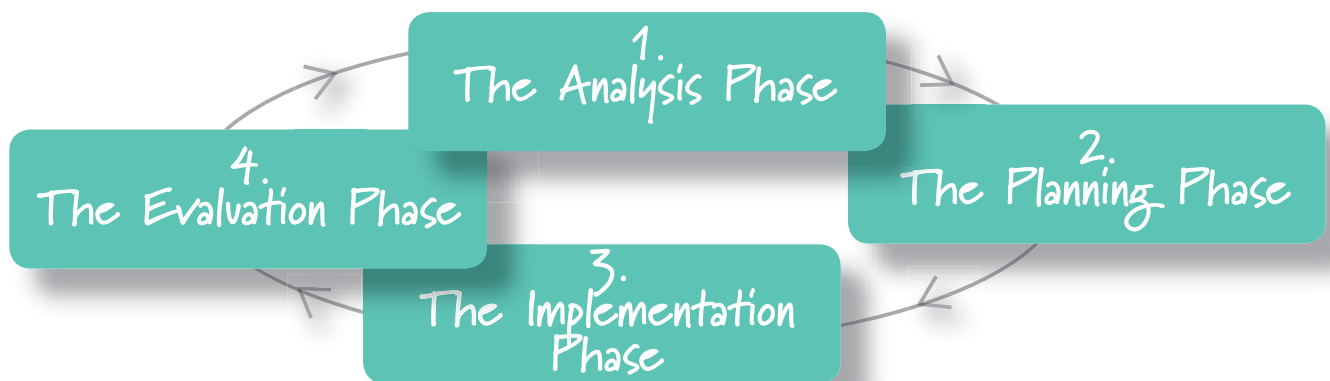
In practice, there can be a lot of **overlap** between the different phases. For instance, you may have to start **Implementing** before you have totally completed your **Planning**. By the same token, you may be deep in the **Implementation phase** when circumstances change, forcing you to go back to make a new **Plan** and possibly even a new **Analysis**. **Evaluation** will take place at many points throughout the process, not just at the end.

Strategies are **cyclical** because the situation around us is always changing. No one can predict the future and having a strategy cannot prevent circumstances from affecting your organisation. Having a strategy does not mean that you are trying to control the future. It means that you are anticipating and preparing for whatever the future may bring.

The most effective strategies are those which can respond and adapt to changes as they arise. This means that a strategy should not be just another document gathering dust on the shelf. A strategy is something alive, something which moves and evolves as necessary.
Having said that, it is important to stress that strategy development must begin at the beginning. It is not logical (and certainly not effective) to start implementing action steps before you even know where you are starting from.

BENEFITS AND DISADVANTAGES TO STRATEGY

Despite the fact that many institutions have strategies (commercial companies as well as non-governmental organisations), you might not yet be completely sold on the idea. While this booklet is obviously very much in favour of strategy, there are advantages as well as disadvantages involved:

Some advantages to strategy	Some disadvantages to strategy
• Strategy objectively assesses your position • Strategy defines your direction • Strategy provides clear targets • Strategy facilitates decision-making • Strategy allows you to measure progress	• Strategy takes a lot of time • Strategy costs money • Strategy limits flexibility • Strategy tries to predict the future • Strategy is only for experts

Many people feel that although the advantages of strategy are very attractive, the disadvantages outweigh any possible benefits. As a result, many people write off the idea of strategy-making without ever having given it a try.

It is interesting to note that the disadvantages listed above stem largely from our *perception* of strategy rather than from our own experience. If you have never tried to design or implement a strategy, how can you know if it takes time or costs money? And what, precisely, is this perceived loss of time and money measured against?

The disadvantages listed here are not actually disadvantages to strategy *itself*, but rather they describe problems which can arise when a strategy is not developed in the correct way. These perceived disadvantages are actually commonly held strategy myths. These myths are so powerful that they can strangle the strategy development process before it even gets started. Therefore it is important to understand where these and other strategy myths come from.

STRATEGY MYTHS

There are **three main reasons** why people are **resistant** to the idea of making a strategy.

- First of all, we are afraid that strategy development takes a lot of **time**.
- Second, we are afraid that a strategy will **limit** what we are allowed to do.
- Third, we are afraid that you need special **expertise** to make a strategy (and also to understand it!)

As a part of our public relations makeover, it is vitally important to dispel these strategy myths.

Why do we think that strategy takes so much time?

Probably because in the past we were forced to take part in endless strategy discussions that didn't lead to any concrete changes whatsoever. Unfortunately, this is very common. Organisations don't always know how to manage the strategy development process.

It is true that developing a strategy takes time. There is just no getting around it. If you are a big multinational company, your strategy development might even take a couple of years to complete. Luckily, most of us are not big multinationals and our strategy does not need to be so complex. Depending on your situation, it is possible to put together a good solid strategy in a matter of months, possibly even weeks. More importantly, this investment of your time should not feel like a punishment. As you move through your strategy development step by step, you will probably start to feel challenged in a positive way. Your strategy development process should start to clarify many vague points and to answer many outstanding questions. If you could come away from your strategy development with a new energy and enthusiasm and with a clear idea what you are working for, wouldn't that be a fantastic use of time (and money)?

Another misconception about strategy-making is that something over and above our daily tasks. If your reaction to the idea of developing a strategy is "Oh great, one more thing I have to do", it is no surprise that you resist devoting time to it. Strategy-making should not be seen as an additional task, it should be seen as an integral part of the daily work of the organisation. Spending three solid days bashing out a strategy once a year is far less effective than devoting a quick 2o-minute strategy check-in session during each weekly staff meeting.

Why do we think that a strategy will limit us?

Nobody likes to feel restricted or controlled, certainly not by something as trivial as a plan on paper. The non-formal youth sector attracts many people because of its energy, its creativity and its lack of hierarchical structures. It is no surprise, then, that workers in this sector resist the idea of having to conform to regimented systematic plans. One common false presumption in strategy-making is the idea that you are going to be tied to a fixed plan for a long period of time. That's a great way to de-motivate people!

We can change our attitude to strategy if we change our perception. Think of a strategy the same way as you would think of a household budget. We use budgets to keep track of our money, to make sure that the most important costs are paid every month, to know how much we have to "play" with, and to be sure that we do not overspend. If we do not follow our budget, we could get into serious trouble. While some people might see budgets as being restrictive, there are many more advantages than disadvantages to having one (and to sticking to one). A strategy is no different. A strategy clarifies what our top priorities are. It makes sure that we keep to our course and do not get easily diverted towards lesser priorities. A strategy helps us make choices and by doing so it saves us time and money.

Now if your salary was increased, wouldn't you automatically take another look at your budget? Of course you would – you would want to see where you can make changes and how much money you can now use for "playing". On the other hand, if your salary decreases, you have to look at your budget to see where you need to make cuts. A budget is not permanent and neither is a strategy. Both a budget and a strategy provide an outline but they are never fixed in stone. A good strategy is made up of a plan solid enough to stand up over the long term (despite changes in our environment) but which is also flexible enough to adapt to new situations when necessary. In this sense, a strategy is not a restriction but is rather a guideline. It is the compass that helps keep you going in the right direction. Most importantly, and just like a budget, a strategy helps you know when to say "no".

Why do we think strategy is only for experts?

Go to your local bookstore and check out the books on strategy. First of all, most strategy books are found in the business section – not normally the place where non-formal youth workers spend a lot of their time. You may find yourself staring at massive volumes filled with page after page of words and concepts which are difficult to understand.
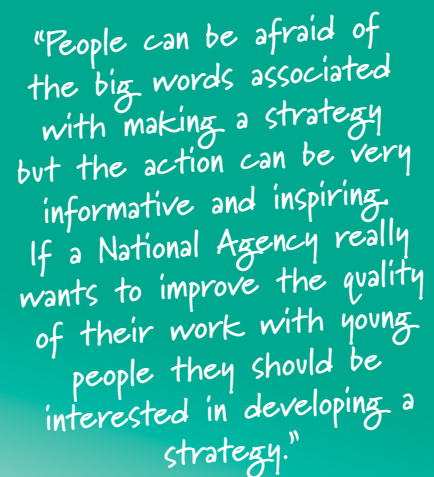
A lot of these words deal with the world of big business and don't seem to relate at all to non-profit or non-governmental organisations. No wonder then that so many of us don't feel we have the knowledge to develop our own strategies!

There are a lot of experts who devote their life to examining every miniscule detail of strategy development and spend years writing books about it. Frankly, a lot of this information is too detailed and too specific for our purposes, especially if you are making a strategy for the very first time.

You don't have to have a Ph.D. in business studies to give strategy-making a try. Strategy-making consists of gathering information, understanding that information and using the information to make choices. If you can do that, you are already well on your way.

"People can be afraid of the big words associated with making a strategy but the action can be very informative and inspiring. If a National Agency really wants to improve the quality of their work with young people they should be interested in developing a strategy."

(Agnieszka Moskwiak, NA Poland)

BUT DO I REALLY NEED A STRATEGY?

Most people agree that having a strategy is a pretty good idea, but this does not mean that they rush to their desks to sit down and make one. It is quite natural, particularly for people in the non-formal sector, to be sceptical about strategy development. Many organisations and institutes function quite nicely without any kind of strategy (or at least it looks that way!) With so little time and resources available, developing strategy can seem like an unaffordable luxury.

For Inclusion Officers, the idea of making a strategy can be particularly hard to swallow. Depending on the target group Inclusion Officers work with, being asked to make a strategy can feel like being asked to predict the unpredictable and to manage the unmanageable. So how do you know if you or your inclusion work really needs a strategy?

Every organisation or institution needs to plan for the future, particularly those structures working with extremely difficult target groups and/or severely limited budgets, but the fact is that very few take the time to do it. The following list of **warning signs** can help indicate if you are in need of a (new) strategy (Olsen):

- Someone asks you what your NA plans to achieve in the coming year concerning inclusion and you don't have an answer. You ask your colleagues the same question and they all give totally different answers.
- You have a vague idea what you would like to do in the coming year but you have no idea how you will do it.
- Everything on your to-do list is a top-level priority. You don't know where you should best invest your time.
- You don't have a clear idea of which organisations/institutions are your partners and which are your competitors. When project promoters ask you what is the added value of your activities, you don't have a good response.
- You are presented with a new opportunity (e.g. a new activity, a new funding line, a new partner, etc.) and you don't know how to decide whether it is something you should pursue. You normally pursue every new opportunity for fear that you will miss out on something big.

As an Inclusion Officer you should also be on the look-out for these **warning signs**:

- There are inconsistencies in your information on inclusion (printed materials, website, etc.) You can't understand the content and neither can anyone else. Whenever you try to explain your inclusion plans to colleagues or external partners you tell a different story.
- Your inclusion plans for the coming year are defined by one or two persons in your office. External partners and young people themselves play no part in the process.
- You ask your colleagues what "success" in your inclusion work should look like and they find it difficult to answer.
- You are asked why you work in the inclusion field and your only answer is "because it's my job".

Does any of this sound familiar? If so, the time is ripe for you to take a step back to focus on what you are doing and why you are doing it. A strategy can help you in this process because it acts as a general guideline which defines the direction you want to go and helps you avoid distractions along the way.

At this point it is important to stress that a strategy is **not a magic charm**. Always bear in mind that strategy-making is not a case of finding *the* solution to the problem, but rather it involves finding *a* solution to the problem - a solution which you think is both realistic and appealing. Just as with any tool or method, it is up to you to shape a strategy which is appropriate for you, your situation and your organisation.

Strategy is <u>**not**</u>	Strategy **is**...
• Reacting to a situation	• Steering the situation
• An all-encompassing plan	• A statement of your intent
• Linear	• Cyclical
• A restriction	• A guideline and a compass
• An additional task	• An integral part of your daily work
• Fixed	• Always evolving
• A way to control the future	• A way to prepare for the future
• *The* solution to a problem	• The activity of finding <u>*a*</u> solution

☛ How should an organisation go about making a strategy? Who needs to be involved? What specific aspects need to be thought about if you are focusing on inclusion? The section **"Making an inclusion strategy"** will address these points and outline what specific steps need to be taken in each of the four phases of strategy development.

QUIZ – ASSESS YOURSELF (ADAPTED FROM BRUCE & LANGDON)

How do you think you **measure up** when it comes to strategy-making? Would you describe yourself as a strategic thinker? Use the quiz questions below to gain more insight into **how far you use a strategic approach in your daily work**. Answer as honestly as you can. If your answer to a question is "never", give yourself a score of 1point, if your answer is "always", give yourself 4 points, and so on. Add up your points and check the Scoreboard for an analysis of the results. Review your answers to identify the areas where you need to improve.

1 = Never
2 = Sometimes
3 = Frequently
4 = Always

Nr.	Options	1	2	3	4
1	I know what my plan is for the next three years				
2	I have a written and up-to-date strategic plan				
3	I have the necessary background information to make decisions				
4	I hold strategic review meetings regularly				
5	I talk to the people involved in my strategy about their roles and responsibilities				
6	I know exactly where my team needs to improve on its skills				
7	I ensure that team members take change projects seriously				
8	I see that everyone who needs to know about my strategy is kept informed				
9	I know that my team members see their targets as reasonable but challenging				
10	I ensure that my team always operates within the strategy				
11	I ensure that my team members know the criteria for adopting new ideas				
12	I review and update my plan on a regular basis				
13	I know who my key internal stakeholders are				
14	I know who my key external stakeholders are				
15	I know how my strategy fits in with national-level priorities				
16	I know how my strategy fits in with international-level priorities				
17	I discuss changes to my strategy with my clients and funders				
18	I use SWOT analysis on an everyday basis				

19	I know who our most important competitors are
20	I know what alternative services/activities our competitors offer
21	I can easily describe the added value of our services/activities to clients/funders
22	I know what the threats are to achieving my objectives
23	I require only those who need to be present to attend strategy review meetings
24	I ensure that my own strategy fits in with the strategies of my colleagues.
25	I regularly consult with other team leaders on strategy
26	I identify appropriate priorities according to our client groups
27	I ensure that information about my strategy is always coherent and consistent
28	I know what my current costs are against budget
29	I know how close my current results are to my targets
30	I can say with certainty exactly when our strategic goals are reached
31	I can state my clients' current needs and requirements
32	I know how to meet the practical requirements of my funders

Scoreboard

32-64 points: You operate reactively instead of proactively. You need to spend more time thinking strategically. Choose one or two of the areas identified in the quiz and concentrate on making improvements in the short-term.

65-95: You are a reasonable strategic thinker, but there are still a few areas which need improvement. Keep doing what you are doing well but at the same time make a plan charting out how you will address the leftover weak spots.

96-128: You are a good strategic thinker and it appears you have most areas under control. Don't become complacent – keep looking to see where you can invest time and resources to maintain as strong a strategy as possible.

MAKING
AN INCLUSION
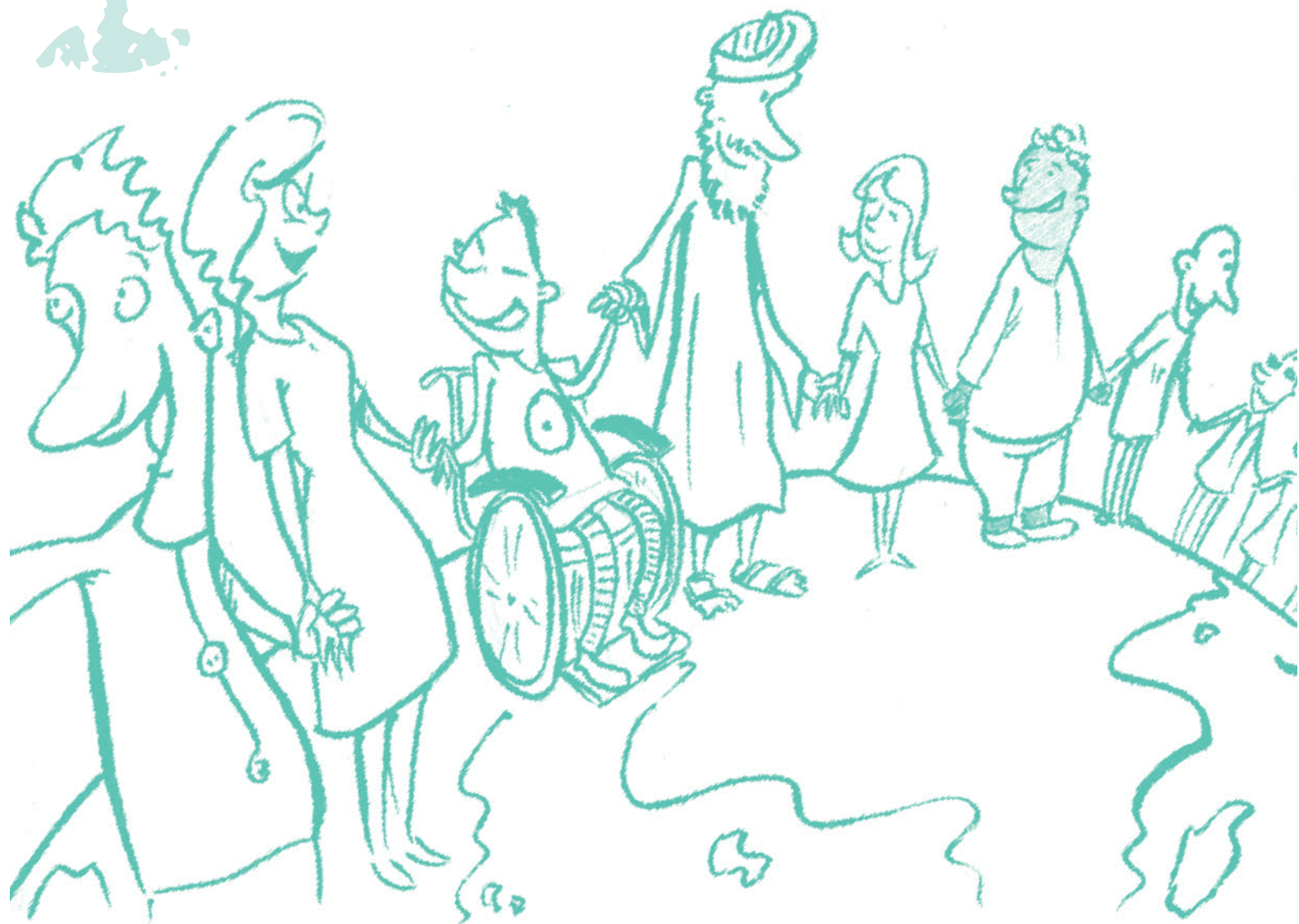
STRATEGY

If you have made it this far, you are likely convinced of the need for strategic thinking. You are interested to get busy and start working out an inclusion strategy for your National Agency. This section outlines how you can start taking steps to develop and implement a strategy which suits your specific situation.

☛ The steps described here below can be used by anyone in almost any context. To better illustrate the theory presented here, we have included some methods recommended by experts at key points throughout the text. In addition, we have listed several exercises at the end of the booklet in the **"Toolbox"**. These are certainly not the only methods you could use but we hope they will help you to find your own way through the strategy-making process and keep up your motivation along the way

WHO SHOULD BE INVOLVED IN THE PROCESS?

You may have heard the expression "two heads are better than one". This is especially true when it comes to strategy development.

Each National Agency has a designated Inclusion Officer who is generally responsible for monitoring all inclusion-related issues. When it comes time to develop an inclusion strategy, the task is often **delegated to the Inclusion Officer** but this can be a **risky approach**. It is neither effective nor realistic for an Inclusion Officer to try to make a strategy on their own. Not only is there simply **too much work** involved but if the inclusion strategy is developed in isolation (on a one-person basis) there is a good chance that the end result will clash with other aspects of the NA's strategy. There is also a very strong possibility that the rest of the team will resist implementing the action steps because they were not involved in the overall development of the plan.

Including other people and their points of view in the strategy development process means that your strategy will have a stronger foundation. It will also increase people's feeling of **ownership** for the resulting action plan. If people feel that they were able to make an active contribution in the early stages, they are far more likely to **take responsibility** for implementing the plan and action steps over the long term.
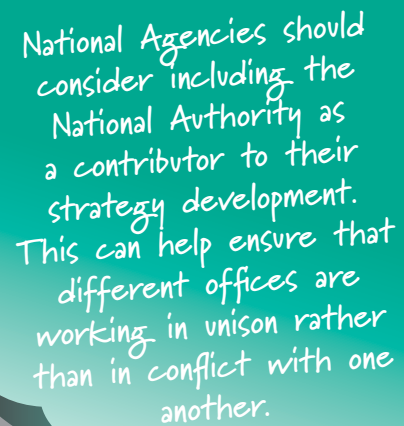
Of course you don't want to slow down the process by having too many players in the game. It is important to identify your key stakeholders.

National Agencies should consider including the National Authority as a contributor to their strategy development. This can help ensure that different offices are working in unison rather than in conflict with one another.

STAKEHOLDERS
A *stakeholder* is anyone who has an interest in or who might be impacted by your strategy.

There are two main groups of stakeholders:

- **Internal stakeholders** – are people **inside** your organisation whose tasks will be impacted by your strategy. Internal stakeholders in the National Agency could include the Project Officers in each separate Action, the Inclusion Officer, the selection committee, contacts in the regional offices and the Head of the Agency. Remember that not everyone in your office should automatically be considered as a stakeholder – only those who will be **most affected** by your plans and those who will make the **biggest contribution** to the strategy-making process.

- **External stakeholders** – are people (individuals, groups or entire organisations) who will **be affected** by your strategy and who can (or want) **to influence** the future of your organisation. External stakeholders for National Agencies could include project promoters, local/regional/national authorities, trainers, and of course the young people themselves.

These are just some examples. Clearly it is not possible to involve every one of these individuals and/or groups in your strategy-making process. The reality of inclusion work inside an NA is that there is little time or manpower available so when it comes to developing strategy it is crucial to identify a short list of *key stakeholders*. Your key stakeholders are the people who need to be actively involved in making your strategy because they are in some way crucial to the success of your plan. It is in your best interest to implicate these key players in your strategy development whenever possible.

THE STRATEGY TEAM

Your key stakeholders will play an important role in contributing information and different points of view but they are not the ones who will make the final decisions nor will they be responsible for the day-to-day implementation of your strategy. For this, you need to set up a *strategy team*.

The strategy team is a **core group of people** who are responsible for gathering information and making choices in the early stages and for implementing, monitoring and evaluating the action steps in the later stages. The strategy team will likely be made up mostly of internal stakeholders, but if possible it is a good idea to include a small number of external stakeholders as well.

Some NAs have well-established strategy teams while others have no defined team at all. Two examples of inclusion strategy teams can be seen here below:

✳ Example 1 – France

INJEP pioneered the idea of establishing a national-level working group on inclusion. In the past, this working group was instrumental in developing inclusion strategy.

The group has traditionally been made up of 10 persons, all from inside the programme (representatives from youth organisations, local municipalities, trainers). The group met twice per year and worked together with the Inclusion Officer and 1-2 representatives from the regional offices.

Bringing stakeholders together in a working group encouraged organisations to co-operate rather than to compete. The group also ensured that the grass-roots level was represented in the strategy making process and not just the view of the central Paris office.

✳ Example 2 – Belgium (Flanders)

JINT has established an internal "sub-team" on inclusion. The sub-team totals 7 persons and is made up of colleagues from the NA (including the Inclusion Officer and a member of the director's team) as well as representatives from other national programmes. The group meets once every 5 weeks.

The internal sub-team works closely with a group of external experts who are requested to give their advice and expertise to develop a mission, vision and strategy on inclusion. The expert group meets once every 2-3 months.

The two groups communicate intensively and "fertilise" each other. Their advice is discussed and immediately implemented into JINT's work. In this way, their efforts are immediately valued.

National-level working groups or strategy teams may not be an option for all NAs. It is perfectly acceptable to have a strategy team made up entirely of NA staff (particularly in smaller offices) but it is very helpful to include at least one or two external stakeholders if possible.

No matter what the size or composition of the strategy team, it is a good idea to involve **the Head of the National Agency** whenever possible. It is the director's task to ensure that the inclusion strategy links in with the rest of the National Agency's activities. Any strategy developed by the team must have the director's approval if it is to be put into practice. This does not mean that the director needs to attend every meeting of the strategy team but they do need to be kept informed of developments as the strategy takes shape.

The composition of the rest of the strategy team will depend on the size of the NA, its current level of involvement in inclusion work, its ambitions for the future and of course its financial means. When choosing potential members of the team, **consider the different tasks** that need to be done in the different phases (information gathering, prioritising, monitoring, evaluating, etc.) and try to match them with the right **personalities**. Strive for a **mix in the team** between "controllers" (who want everything worked out in detail) and "free spirits" (who prefer to see "the big picture").

Large or small, the strategy team must remember that the direction of an inclusion strategy will affect the entire NA so it is important to **regularly update colleagues** outside of the team on the plans.

WHAT DOES THE PROCESS LOOK LIKE?

As stated earlier, strategy-making is made up of four distinct phases: Analysis, Planning, Implementation and Evaluation. Each of these phases can be broken down into smaller steps which make the process easier to manage and which make it easier for you to see progress being made (see the diagram below).

```
                        Analysis

        Needs analysis              Summary


                        Planning

Identifying potential,    Choose priorites    Defining objectives
    action areas                              & desired results


                     Implementation

        Action plan                Monitoring


                       Evaluation

    Process             Results             Impact
```
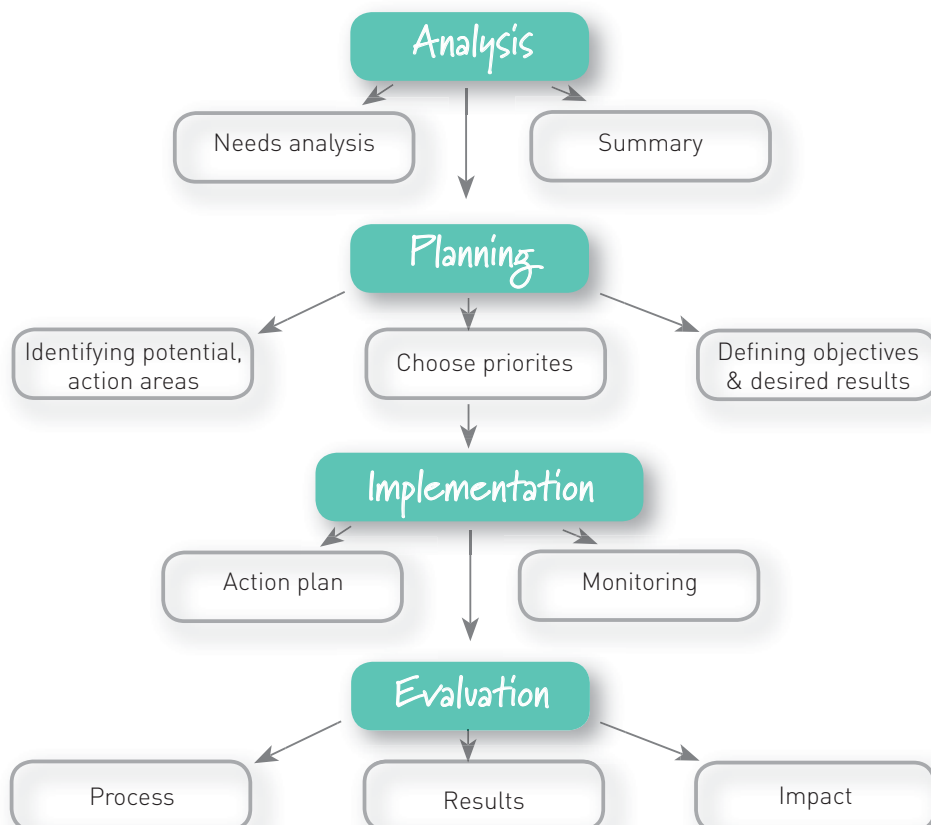
Each person involved in inclusion in the NA will be impacted by the different phases but the main responsibility for steering and guiding the process rests with the strategy team.

As you go deeper into strategy-making you will see that while some of the steps need to be carried out in a particular order other steps are less systematic and may overlap considerably. It is quite normal to be busy with two or even three phases at the same time. Do not become too pre-occupied by the order of the steps. Concentrate instead on moving the process forward as best you can.

The next sections outline what is involved in each phase and describe methods that NAs can use to help them move through the different steps.

The Analysis Phase

"Would you tell me, please, which way I ought to go from here?" "That depends a good deal on where you want to get to", said the Cat. "I don't much care where--" said Alice. "Then it doesn't matter which way you go," said the Cat.

(Alice in Wonderland, Lewis Carroll)

If you're lucky, the inclusion work in your NA these days is going just fine.
 You have no crises to deal with, no difficult issues to resolve, no shortage of funds, no staff turnover – it's just business as usual. If, however, you can see challenges on the horizon for your inclusion work, if you are being asked to take on more work than you can handle or if your budget is under serious pressure, you need to figure out a way to bring the situation back under control. You need to plot a course of action in inclusion which maximises your resources and leads to the best possible results.

When an organisation is **under pressure**, they tend to make one of two **mistakes**:
- They immediately start making a plan, or
- They immediately start taking action (without even bothering to make a plan first…)

There is a real danger in getting carried away and jumping into the middle of strategy development, especially if you are under time pressure, but remember you can't choose the right solution if you don't know what the problem is.

Earlier we stated that that the first step in defining a strategy is to stop and take stock of your current position. This can be formulated in the key question:

WHERE AM I NOW?

To know where you are you must answer a series of sub-questions. What has happened in our inclusion work up to now? What has gone well, what has not, and why? What are the most important challenges we are facing in the NA right this moment?

A well-defined problem is a problem half solved. The **purpose of the analysis phase** is to show beyond any doubt exactly **where your problem areas are.** A good strategy is based on facts – facts about your position (your strengths and weaknesses) as well as the position of key players around you. You can collect these facts by carrying out a "needs analysis".

WHAT IS A NEEDS ANALYSIS?

When commercial companies enter the Analysis phase, they often use **"market research"** or a **"needs analysis"** to get a clear picture of their current position in the marketplace. As National Agencies, a "market research" may not be exactly the tool we need, but a "needs analysis" can be very relevant.

A needs analysis can help you determine your current position (O'Connell). This, in turn, makes it easier to decide where you need to go. In essence, **a needs analysis is**:
- A **review** of your past successes and challenges in terms of inclusion
- An **inventory** of what has been developed and what areas still need to be explored
- A **health check** of your internal procedures
- A **framework** for understanding the "bigger picture" of inclusion in your country.

A needs analysis attempts to collect as much information as possible in order to build a comprehensive understanding of the needs and issues facing your NA. Once those needs are understood, it is a lot easier to identify potential solutions.

A **needs analysis involves**:
- Collecting background information
- Understanding the real needs of the young people
- Identifying potential partners and potential obstacles in the inclusion field
- Making an inventory of the skills, competencies and resources available to you

A "needs analysis" is sometimes referred to as a "situational analysis" a "problem assessment" or an "organisational diagnosis". We use the term "needs analysis" in this booklet to stress that the process should look at the internal as well as external inclusion situation of the NA.

As you go through this process you are actually analysing what is happening in the inclusion field inside and outside your NA. A needs analysis shows clearly where you are starting from and establishes the **baseline** against which the results of your inclusion strategy will later be measured and evaluated. Your needs analysis will help you to **highlight the strengths and weaknesses** of inclusion in the NA and also **indicate opportunities** for the future. This information can then help you to make the difficult choices which will come up in the Planning phase.

The needs analysis is the most work-intensive and time-consuming aspect of developing a strategy but don't let this turn you off – the information you gather in this phase will be worth gold later on. By doing a needs analysis you are making an important investment in your inclusion strategy and in your NA as a whole.

From the Round Table Meeting on inclusion strategies

A needs analysis is **<u>not</u>** an evaluation. This phase is first and foremost about *seeing* the facts. The *interpretation* of those facts happens later in the Planning phase.

HOW DO I DO A NEEDS ANALYSIS?

There is no one standardised method for carrying out a needs analysis. The process is a lot like trying to put together a jigsaw puzzle. Each puzzle piece is unique and shows a different angle of your organisation and the environment around you, yet each piece is essential to providing a complete picture.

To understand their current situation in terms of inclusion, an NA needs to focus on the following puzzle pieces:

- **Your mission** – On a global level, what is it that you are working towards? The mission of the Youth in Action programme and the specific aims related to inclusion are already defined for National Agencies but what, specifically, does your NA want to work towards in inclusion and what do you concretely hope to achieve?

- **Your past performance** – In terms of inclusion, what has your NA concretely achieved to date? To what extent have you successfully been inclusive? To what extent have you successfully contributed to inclusion? Can you spot any significant trends? What has been the role of key players within the NA? What types of challenges or difficulties have you faced in the past? Did your NA have an earlier version of an inclusion strategy? Were those objectives achieved? Why or why not?

- **Your internal systems and processes** – Are your systems as effective as they could be? This is a crucial area because much of the work with young people with fewer opportunities is dependent on efficient systems. An NA has many areas to consider: processes related to promotion and recruitment, processes related to selection, processes related to the distribution of finances, processes related to evaluation and follow-up, etc.

- **Your key external stakeholders** – In the field of inclusion the range of external stakeholders is very broad but nevertheless NAs need to have some information about the circumstances, needs and expectations of each specific group. Understand their circumstances and expectations. What is their motivation for taking part in Youth in Action? What are their biggest needs at this time? What are they looking for from you? To what extent have you successfully fulfilled those expectations?

- **Your competitors** – yes, even National Agencies have competitors and yes, they even exist in the field of inclusion. What are other organisations or institutions working on inclusion doing? Do they offer activities or services similar to those in Youth in Action? What is their strategy? What are they trying to achieve? Who are their focus groups? How might their inclusion work affect yours?

- **Socio-economic trends and changes** – social, economical and political changes usually affect the most vulnerable groups in society first. Any major shifts or trends in this area will likely have a big impact on an NA's inclusion work. What is going on locally, regionally and/or nationally? How this might impact the young people and project promoters you work with?

"One good place for NAs to start in the needs analysis is with the evaluation results of the YOUTH programme. However we must take care as a large part of that evaluation deals with "mainstream" participants. Specific inclusion-related information may be harder to find."

(Gilles Baccala, NA France)

Reviewing your "mission" for inclusion on national level will remind you of the direction you have taken in the past. Reviewing your past performance and your internal systems will highlight your strengths and weaknesses. Reviewing the needs of your key stakeholders, the activities of your competitors and current socio-economic trends will indicate where you can find new opportunities as well as potential threats to your inclusion work.

By collecting the information in each of these separate areas you are painting a picture of what is going on in and around your NA right this moment. This tells you exactly where you are in terms of inclusion and what your starting point is ("here today"). Not all the information you collect will be positive but remember that to really know your situation, you have to be objective. You are looking for the cold hard truth.

NARROWING THE FIELD

NAs face a unique challenge in the needs analysis phase. On one hand, they must try to gain a **deep insight** into their overall situation in terms of their inclusion work. On the other hand, the range of profiles that fall under the term "inclusion" is so broad that is almost impossible to know all the needs and wishes of each separate profile in detail.

Some NAs have solved this problem by choosing to concentrate on a specific target group. In the strategic context, a *target group* is one distinct profile within the larger group of young people with fewer opportunities. Some examples of target groups chosen by NAs in the past include:
- young women from ethnic backgrounds (UK)
- disabled young people (Poland)
- young people in vocational training programmes (Germany)
- young offenders (Estonia).

Identifying one or more specific target groups in the needs analysis makes it much easier for the NA to **narrow down the field** of external stakeholders and to gain a **true insight** into that group's situation. This in turn makes it easier to develop a strategic plan which can respond to the group's specific needs.

In the past, National Agencies have concentrated on such target groups for periods of anywhere from 1to 4 years. Note that it is not possible for an NA to identify *priority groups* within the inclusion field, as this would imply that certain groups receive special treatment at the expense of others. Balancing the need to treat all profiles equally with the need to bring **coherence** into the inclusion strategy can be a delicate **balancing act** but it is possible.

Needs Analysis in the UK
In the past, the British Council (NA UK) has experimented with the concept of a needs analysis specifically within Action 2 (European Voluntary Service). Using the European-level inclusion strategy as a guideline, the team looked at the current happenings within the UK on political level. This highlighted which groups of young people were experiencing urgent problems. On this basis the team determined which groups the NA would target. To get to know the needs of the targeted groups, the NA co-operated with organisations working directly with these profiles by initiating dialogue, by organising workshops to better understand the difficulties and by closely assessing pilot projects run with these young people.

METHODS / TECHNIQUES TO USE IN A NEEDS ANALYSIS

The individual puzzle pieces which make up your needs analysis can be obtained by using a **variety of techniques**. It is important for NAs to use different methods because you are searching for different types of feedback from different sources. In a needs analysis, one size definitely does **not** fit all!

Some possible methods include:

- **Questionnaires** – an inexpensive way to gather data from a potentially large number of respondents (they also allow for a statistical analysis of the results)
- **Surveys** – good tools for measuring levels of satisfaction, either internally or among your clients.
- **Statistics** – a treasure trove of information. How many participants? How many projects? How many new clients? How many staff hours? Etc.
- **Interviews** – allow you to gather more in-depth information from a specific group of candidates
- **Small group discussions** – a semi-formal way to explore issues within a mixed group (mixed functions, mixed profiles, etc.)
- **Focus groups** – a small group of candidates selected to represent a much larger group, usually sharing some specific characteristics of a defined profile.
- **Task and/or systems analysis** – a way to examine systems and activities which are carried out consistently and repeatedly (e.g. the process involved in selecting project applications)

These are just some examples. Each of these methods has its own strengths and weaknesses. Not every method is suited to every situation so it is useful to combine different techniques whenever possible. Mixing methods ensures that the resulting feedback is as comprehensive and meaningful as possible. It will also reduce the possibility of missing key issues.

☛ Some sample methods designed specifically for carrying out an inclusion needs analysis are included in the **Toolbox** on page 82.

SUMMARISING THE OUTCOMES

As the needs analysis progresses, it is likely that the NA will collect a large amount of information. The NA needs to make sense out of all the different outcomes by pulling out the elements which are the most valuable or which will have the most impact on future inclusion activities.

A useful tool for this process is a **SWOT summary**. SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats. A SWOT summary is ideal in the final phase of a needs analysis because it presents a concise overview of the most important positive and negative points to come out of your research.

SWOT Summary	
Strengths • What has been going well in our inclusion work? • What is the NA good at?	**Weaknesses** • What has not been going well in our inclusion work? • What resources or skills is the NA missing?
Opportunities • Which new target groups can be interesting for us to work with? • What new laws, legislation or social trends offer us exciting new chances?	**Threats** • Which inclusion activities/services are being duplicated by our competitors? • Which socio-economic or political trends might negatively affect us, our project promoters or the young people?

With all the information from questionnaires, surveys, focus groups and statistics staring you in the face it is easy to feel intimidated but the procedure is quite simple:

- Draw up a SWOT table according to the outline above. Use the sample questions in the outline to help you decide which key elements from your analysis belong under which heading. Remember that **strengths and weaknesses** refer to what you can control inside your organisation (internal elements) while **opportunities and threats** refer to forces beyond your control outside your organisation (external elements).
- Select the most obvious or urgent points for each heading (try to limit yourself to a maximum of 1o points per category). Agree these points within the **strategy team**.

- Present the SWOT summary along with the supporting information to the **Head** of the NA (or the Board of Directors) for their approval.

Once you have reached agreement on the priorities within your strategy team and have approval from the director there is one last step. Before you use the summary as the basis for the Planning phase, **show it to your key stakeholders**. The most important of these for an NA are, of course, the project promoters but this group also includes members of your own staff as well as other important external parties. This is a way of double-checking your conclusions. Your stakeholders can point out any areas which may have been misinterpreted or which are already being addressed.

It is very much in your interest to take this last step in the needs analysis process. Your stakeholders will not only feel respected, they will gain more insight into your situation. Understanding your summary makes them more likely to "approve" it as well. In this way you can feel confident that your final plan will be truly **"client-oriented"**.

DO'S AND DON'TS IN THE ANALYSIS PHASE

When it comes to the Analysis phase, there are some danger areas that should be kept in mind. These traps are easy to fall into and can have serious consequences for your strategy over the long term.

Don't	Do
Try to skip the Analysis phase	See the Analysis as way to make an inventory of your current situation and as a way to establish the baseline against which the results of your strategy will be measured.
Assume you already know the outcome	Take time to hear the views of other stakeholders.
Overlook key information sources	Ask stakeholders for their recommendations on where to look, what to read, who you should speak to, etc.
Overlook personal bias	Make sure the information you collect is reviewed by a variety of stakeholders.
Disregard or disbelieve unpleasant facts	Use the facts to make changes or improvements if necessary.
Accept incomplete data	Strive to compile as complete a picture of your situation as possible.
Be too quick to interpret results	Focus on *gathering* rather than *interpreting* information in this phase.
Collect so much data that you feel overwhelmed	Manage information you have gathered by using the "So what?" test. If the answer is "So nothing", the information is not important. Disregard it and move on.

If you run into difficulties in the Analysis phase, take a step back, relax, catch your breath and then give it another try. An inclusion strategy can only stand the test of time if it is built on a good foundation, so it is vital that your analysis is a solid as possible. Taking time to ensure that your needs analysis is done thoroughly is definitely time well spent.

It will have taken you some time, but when the ink has dried on your SWOT summary and you have the approval of both your boss and your clients, the NA can say with certainty

WHERE AM I NOW? I AM HERE.

Whatever you do… don't let down your guard!! Never assume that you have everything right. Review your gathered information regularly as it has a big impact on your planning and implementation.

The Planning Phase

> *If you fail to plan… you plan to fail. (George Hewell)*
> *To plan: v. To bother about the best method of accomplishing an accidental result*
>
> *(The Devil's Dictionary. Ambrose Bierce)*

According to leading business thinker Paul Gorman, most businesses owners spend more time planning their holiday than they do planning their business. Then they wonder why their business struggles so hard to achieve the success they hoped it would.

It is probably fair to say that this lack of attention to planning is just as endemic among National Agencies. There are good reasons for this. Planning takes time and time is money. If your NA works with particularly difficult profiles of young people and a large portion of your day is spent in crisis-management, taking time to plan is probably not at the top of your list of priorities. After all, why bother to plan for a future that you cannot control?

When you work out a plan for your NA, you are actually thinking about the future so that you can do something about it now ("where tomorrow?").

A well-thought out plan enables you to identify priorities and determines your course of action (Shapiro). Your plan is the tool that charts your direction and which maximises the effectiveness and impact of your daily inclusion work.

Your plan is your answer to the key question:

WHERE DO I WANT TO GO?

When you make a strategic plan, you are developing a framework which outlines "the big picture". This framework will help your NA to determine the priorities and shorter-term objectives which will bring you closer to achiever your long-term goals. **A strategic plan clarifies what exactly it is that you are trying to achieve and the approach you intend to use** (Shapiro). It does *not*, however, spell out specific actions to be taken. This will come later in the Implementation Phase.

WHAT IS INVOLVED IN PLANNING?

If the Analysis is the most time-consuming phase of strategy development, then Planning is the most challenging. It is here that you have to make choices for your NA. **This is where you must decide what you will and will not do**. You must also sort out which information is relevant for your Agency and which is not.

The process is not always easy. Keep in mind that making your plan is very similar to making a budget. You are putting together a framework which makes sure the **most important areas are identified and taken care of**. This framework will guide you as well as protect you. The good news is that if your NA has invested the time and effort required for a thorough needs analysis, you are already well on your way.

There are many different ways NAs can approach the Planning phase but in essence the process consists of three main steps: identifying potential action areas, choosing priorities and defining objectives and desired results. These steps are the same no matter what the size of the NA and no matter what your level of involvement in inclusion.

Identifying potential,
action areas

Choose priorites

Defining objectives
& desired
results
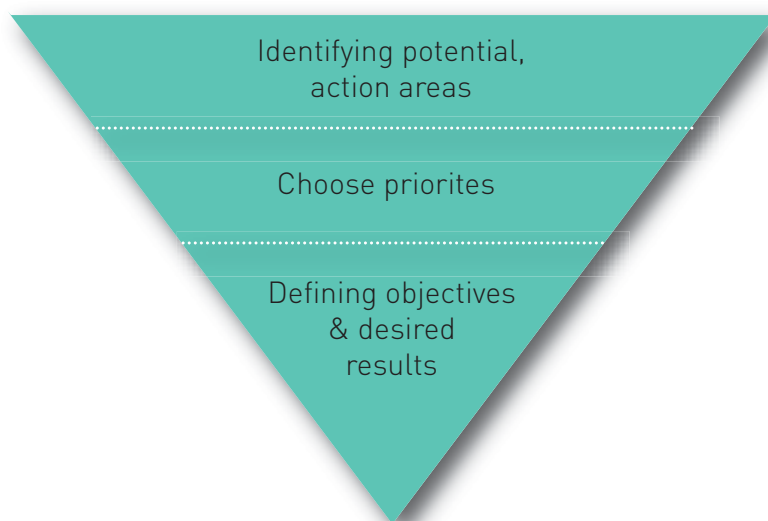
The best way to visualize the planning phase is to think of an **inverted triangle** (see the diagram above). The inclusion field is very large and there are many needs which all require urgent attention. It is simply not possible for an NA to respond to all of these needs. The planning phase involves a series of steps which takes the wide range of potential action and narrows it down to a short list of priorities. Those priorities are then narrowed down even further into concrete objectives and specific results the NA aims to achieve.

HOW LONG DOES PLANNING TAKE?

Depending on the size of your NA and your approach to strategy-making, it may have taken several months to complete your needs analysis. Many people wonder if the Planning phase will again require so much time.

The good news is that once an NA has invested the time in a needs analysis, the planning phase can move quickly. The needs analysis provides most of the information an NA needs to make its strategic plan. Although there are several steps involved, it is quite possible for the strategy team to put together a plan in as little as 1-2days **BUT** this depends on the quality of the information gathered in the needs analysis and a large amount of preparation work being done in advance. If the strategy team gets bogged down and finds it difficult to make the choices and decisions required in the Planning steps, it is likely that some information was missed in the Analysis phase. In such cases it is better to go back and fill in the gaps.

Keep in mind that planning is not a one-off activity. If life were predictable it would be easy to make a long-term plan one time and then forget about it. In reality the situation around us is always changing – particularly in the field of inclusion - so there is a good chance that at some stage your NA will need to review its plan to make sure you are still going in the right direction.

HOW DO I MAKE A PLAN?

We make plans in our head all day long. We have so much experience in planning that putting together a strategic plan for our inclusion work should be a piece of cake. Unfortunately, this is not always the case.

The more complex the situation the more difficult it is to make coherent plans. There are few fields of work which are as complex and as broad as the field of inclusion so it is no wonder that NAs often find it difficult to know where to start.

In order to put together a strategic plan, NAs will need two important tools:
- first, the **Inclusion Strategy of the European Commission** (which outlines the global goals of inclusion in the YIA programme until 2o13)
- and second the **result of your NA's needs analysis from the pervious phase.**

These tools present **two sides** of the same coin: the *expectations* of the EC and the *situation* of the National Agency. Both of these need to be taken into account at each of the three steps in the planning process.

☛ You can download the **Inclusion Strategy of the European Commission** at
www.salto-youth.net/InclusionStrategy/
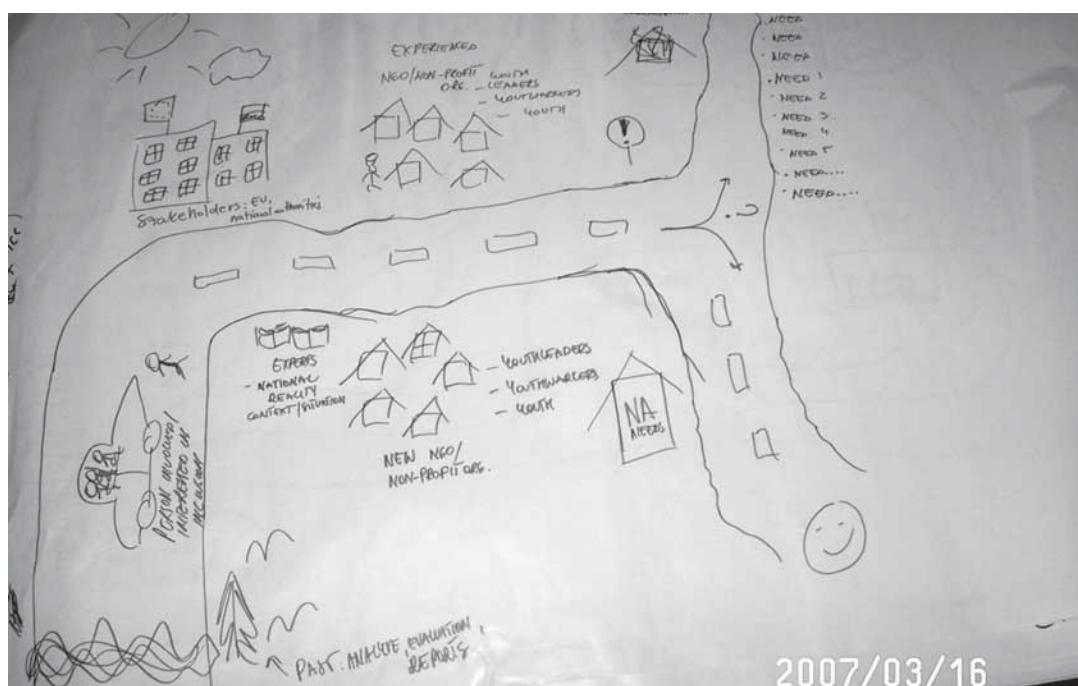
STEP 1 – IDENTIFY POTENTIAL ACTION AREAS

The EC's Inclusion Strategy highlights a range of possible action for NAs to take within the broader frame of inclusion (for example increasing numbers, improving quality, developing tools, eliminating obstacles, etc.). The same can be said of your needs analysis. It is likely that during your information-gathering you spotted many areas where it could be interesting (or where it is urgent) for your NA to invest its inclusion time.

Unfortunately, National Agencies cannot respond to all inclusion needs nor do they have enough resources to develop every interesting new idea. **Being strategic is about making choices** (Olsen) but in order to choose we must first have a clear idea of what our options are. We need to identify our potential action areas.

A *potential action area* is any area, positive or negative, where the facts indicate that something could or should be done. Identifying potential action areas basically involves **making an inventory of all actions that are interesting or necessary for the NA to do in order to improve their inclusion work.**

Different methods can be used to make this inventory. One helpful and thorough technique is to use the SWOT summary from the end of the Analysis phase to highlight areas where your NA could invest, mobilise, make decisions or control damage

☛ This is sometimes called a "SWOT Interplay" - see the **Toolbox** for a detailed description of this method on page 88.

Another way is to simply brainstorm and write down all the different types of action that you can think of which are relevant to the NA at this time.

Remembering the global goals of the Inclusion Strategy on one hand and taking account of the points raised in your needs analysis on the other, consider the following **questions**:
• What can we do that will help our NA achieve our purpose in inclusion?
• What activities will do this?
• Do our actions/activities today make sense in terms of the EC's strategic framework?
• Are there other things we should be doing?

Try to **answer** each question in terms of:
- new opportunities
- new contacts
- improving the activities/services of the NA
- improving systems and processes inside the NA
- education and training (inside and outside the NA)
- addressing problem areas or urgent issues
- addressing leftover or incomplete goals and actions in inclusion (e.g. from last year, from a previous strategy, etc.)

In this step you are looking for any and all feasible areas for action. Don't limit yourself in the brainstorming phase – put down all your thoughts about what could or should be done in inclusion on national level.

Your result at the end of Step 1is a list of potential action areas. It is likely that you can immediately recognise certain actions which are not realistic or which are not essential to the NA at this point in time. Cross these off your list immediately. The remaining list of points is probably still fairly long. It would not be efficient to try to take action on every one of these so the second step in the planning process requires the NA **to prioritise**.

STEP 2 – CHOOSE PRIORITIES

Step 2is the most difficult point in the strategy-making process – the moment when you have to determine the best opportunities for your NA as well as identify areas where action is most urgently required. This involves choosing your *priorities*.

There is no doubt that some of the choices to be made here are serious ones but all the background work you have done up to this point will make the process easier. Thanks to all the preparation in the earlier phases it is not likely that you will choose the wrong path now.

"Even if opinions differ, you need to identify the trend or main line you want to follow in your inclusion work. Strategy is about choice. Your plan is like a statement that says "We do this because... and we don't do that because..."

Ann Hendriks,
National Agency Belgium
(Flanders)

There is no one fail-safe method for choosing your priorities. Inclusion is a particularly difficult area to prioritise because the spectrum of target groups is so diverse and the number of potential actions is huge. One way to determine priorities is to pair different potential actions and on the basis of comparison choose which of the two has higher importance.

☛ This technique is called a "Paired Comparison Analysis"- see the **Toolbox** for a more detailed description of this method on page 91.

If you prefer a more informal method, review your list of potential action areas and then ask yourself the following **questions**:
• What is our NA best qualified to offer in order to address the areas identified?
• Is anyone else already doing what we can do? If so, do we have anything to add?
• In the areas where we are qualified, where can we make the most significant difference? Where can we effect the biggest changes with minimum investment?
• What are the pros and cons of the different potential action areas?
• Will this make the best use of the NA's resources?

After considering the answers, start to prioritise the action areas. Ask yourself:
• What is most important for our current and future work?
• What is too serious to ignore?

Your aim in this step is to reduce your long list of potential action areas to a short list of priorities

☛ It can sometimes be helpful to make two separate lists to distinguish internal from external priorities.

The final list of priorities is extremely important as it will serve as your reference in the phases still to come. Should you ever feel uncertain about what you should be doing or where you should be investing your inclusion time, your list of priorities will provide you with the answers.

N.B.!! Even though you have streamlined your original list of potential action areas down to just a few priorities, **do not throw away the leftovers**. The other potential action areas are still relevant – they are just not where the NA will invest its time and attention at this particular moment. If the NA manages to successfully implement its first round of priorities, you can then go back to the original list of potential actions and repeat the same exercise to determine what your new priorities should be.

STEP 3 – DEFINING OBJECTIVES AND DESIRED RESULTS

You have now drawn up a clear list of priorities for your NA but you may have noticed that these are still very much "up in the air". The priorities are not yet very precise nor do they fit into any kind of definite framework. The last step in the Planning phase is to flesh out the priorities by *defining objectives and desired results* that the NA wants to reach in each area.

A priority is really nothing more than an idea which has been prioritised over other ideas. It is not possible to "do" a priority (just like you cannot "do" an idea). Before we can start "doing" (that is, before we can start to take action) we must first define objectives for what we are trying to accomplish.

An *objective* is the object or aim of an action (Allen). **An objective states what is to be done and indicates the results to be achieved**. Defining meaningful objectives may take a bit of thinking but you can make the process much simpler by beginning at the end - by determining what specific results you want to achieve. After all, if you know where you want to end up, it is much easier to say what needs to be done to get there.

Priority	→ Desired result	→ Objective

Choose one of the priorities from your list. Ask yourself
- What <u>exactly</u> do you want to achieve in this area?
- How much / how many do you want to achieve?
- For whom (which target group)?
- Within which timeframe?

The answers to these questions are your desired results. Once you know the results you want, express exactly what you will do to achieve them. This formulation is your objective.

✳ Example 1

The National Agency of "No-Country" has noticed that compared to other profiles the number of young women from ethnic backgrounds taking part in the Youth in Action programme is very low. The NA decides that increasing the number of female participants from ethnic backgrounds is one of their priority action areas.

Priority action area	Desired result (after 3 years)	Objective
Increase the number of young women from ethnic backgrounds participating in our activities	Have a minimum of 20 young women from ethnic backgrounds taking part in activities in each of the separate Actions of YIA.	To increase the participation of young women from ethnic backgrounds to a minimum of 20 persons per year in each separate Action of YIA.

✳ Example 2

The National Agency of "Nowhere-land" has been successful in including fewer-opportunity young people from a variety of backgrounds in their Action 1 Youth Exchanges. However, they are unable to say to what extent that participation has contributed to the inclusion of the young people in society at large. The NA decides that developing a new system of evaluation to measure inclusion in Action 1 is one of their priority action areas.

Priority action area	Desired result (after 3 years)	Objective
Develop a quality-based evaluation system to measure social inclusion resulting from Action 1 activities	Have newly-defined quality indicators and evaluation systems in place and in use by all Action 1 project promoters	To develop and implement a new evaluation system based on quality indicators for measuring social inclusion as a result of participation in Action 1 Youth Exchanges to be used by all project promoters

Once you have written out your objectives, double-check to make sure that they meet the SMART criteria. Are your objectives:

S = Specific?
M = Measurable?
A = Agreed upon (by the team)?
R = Realistic?
T = Timebound?

In the examples above, the priorities are vague and undefined. The objectives, by contrast are *specific* (they state who and what), they are *measurable* (how much) and they are *timebound* (by when). The strategy team can then decide whether or not the objectives are *realistic*. If so, they can then be *agreed* upon by all members of the team.

☛ More information on SMART objectives can be found in the **Toolbox** on page 94.

When defining objectives and desired results, NAs need to pay close attention to the **timeframe** in which these are to be achieved. There is no hard and fast rule for defining a timeframe; the choice will be different in each National Agency. Since the EC's Inclusion Strategy runs until the end of the Youth in Action programme in 2013 , it would be logical for NAs to define objectives to fit within the same timeframe. Some NAs are in a position to do this but others may find it difficult to define objectives for such a long period. If your NA is developing an inclusion plan for the first time, it is advisable to choose a shorter period, **for instance 3 years**. This is long enough to allow the NA to achieve complicated objectives while at the same time is short enough **to keep up the team's energy and enthusiasm**.

Choosing a **realistic timeframe** is **vital to the success of your strategic plan**. Your objectives need to be structured in such a way so as to offer your NA some **long-term perspective** in its inclusion work. They should be leading towards concrete changes and improvements. Because of this, a 3 -year period should be seen as the **minimum** length of time needed in which to measure objectives. Anything less (e.g. 2years or 1year) is not in keeping with the philosophy of a strategic approach. A one- or two-year time period is more likely to resemble an extended action plan than a strategic outlook.

At the end of Step 3 you should have a complete list of SMART objectives (at least one objective for each of your priorities).

SUMMARISING YOUR PLAN

The three steps of the Planning phase will provide you with a solid strategic plan. They will also clearly illustrate the logic that led you to the final result.

When the outcomes of the three steps are presented on paper, you can see a clear line running through the entire process to this point:

SWOT summary (from the needs analysis)	=	overview of the NAs position at this time
Potential action area	=	all areas where action is possible
Choosing priorities	=	prioritisation of the most important actions
Objectives & desired results	=	what concretely is going to be done

Each of these parts together makes up your strategic plan. Take time to write down and record the outcomes of each step clearly on paper. Just presenting the objectives and desired results is not enough – you risk losing or forgetting the logic that helped you to formulate them. **Your strategic plan should be presented in such way that if a new staff member were to join your team tomorrow they could read the plan and know what is to be done, in what order it is to be done and why it is a priority.**

It takes some effort to reach this point and write out your plan but the advantage is that your NA now knows exactly what they should be spending their time on and what they should not. They know where to invest their resources and where not to. Most importantly, all of the named objectives and priorities are backed up with explanations, reasons and facts.

☛ At this stage it is a good idea to review the outcomes of each of the three steps in the Planning phase (potential action areas, priorities, objectives and results) with your **Head** of NA to obtain their approval before you move on to the Implementation stage.

TALK IT OUT

While there are many methods you can use to help you manoeuvre through the three steps the main tool you will use throughout the Planning phase is **group dialogue**.

A strategic plan is based on choices and the only way to make those choices is for the strategy team to sit down, talk through the different possibilities, weigh the choices carefully and ultimately make their decisions. By definition this process is **highly subjective** but this is normal in strategy-making. Subjectivity does not need to be a problem as long as the strategy team can explain the reasons behind their choices.

As the strategy team moves through the three steps it is very important to aim for consensus on all the points to be decided. **If any member of the team is unhappy with the choices being made the underlying issues must be sorted out immediately**. In planning discussions it is quite usual for people to show their personal preference for one option over another. It is acceptable to try to "sell" others your vision or views but sooner or later the team must make decisions as a group. Each member of the team needs to stand behind these decisions. If they do not, the Implementation phase could be seriously compromised.

Planning in Germany

Once a year the Germany National Agency hosts a meeting called "Treffpunkt" ('Meeting point"). Treffpunkt is open for all organisations participating in YIA as well as for researchers, experts and young people trained as "Euro-peers". Treffpunkt uses Open Space methodolgy to encourage participants to discuss whatever issues are most important to them. Many ideas and suggestions come out of these meetings. The NA staff reviews the points raised in the various discussions. When appropriate, they try to work the outcomes into a plan. The final decision on strategy is taken internally by the NA staff. In this way different stakeholders feel like they are making an active contribution to the strategic plan.

SPECIFICITIES OF NAS IN THE PLANNING PHASE

When it comes to the Planning phase, National Agencies are not in the same position as other non-profit organisations or as commercial companies. These other institutions have a higher degree of flexibility in terms of the direction they can choose and the choices they can make. For example, a commercial company can decide to stop making one product and to start making another. A non-profit can choose to put less effort into certain activities and more into others. National Agencies do not have the same options; they are more **limited in the type of choices they can make**.

This is particularly true in terms of an Agency's inclusion work. **A National Agency cannot choose whether or not it will work on inclusion**. They cannot decide to work with some fewer-opportunity profiles and not with others. An NA cannot choose to divest in specific activities if there is too little demand nor can they create a new programme of activities. All of these areas (and many others) are already defined for them. So is there any space at all for an NA to make its own strategic plan?

The answer, of course, is yes. The **European Commission's Inclusion Strategy** presents a very **global approach** to inclusion. It is not possible (nor realistic) to make one inclusion strategy which suits all the countries of Europe.

The **success of the European-level inclusion strategy depends on each NA's ability to develop a strong national-level plan which responds to the real needs in each separate country**. The national-level plan should not veer away from the EC's global inclusion strategy but rather it should clearly link in and compliment it.

Within their national-level plan National Agencies need to focus their attention on issues which they _can_ influence. **For example**, in which areas of inclusion does the Agency want to grow? Which target groups will be focused on? How will these groups be reached? What does "success" look like for this target group? How will this success be measured? How will we promote that success once a project has finished?

Since the field of inclusion is so large, it may be worthwhile for NAs to consider developing a kind of "sub-plan" within the larger inclusion strategy with specifically defined objectives and results for selected target groups or even for individual Actions. "Sub-plans" require extra time so NAs should only pursue this option if they have sufficient human resources to devote to it.

DO'S AND DON'TS IN THE PLANNING PHASE

Putting together a strategic plan is not always easy but keeping the following do's and don'ts in mind should make the process easier:

Don't	Do
Deviate from the NA's global strategy	Make sure that inclusion priorities and objectives link in clearly with the rest of the NA's strategic plan
Rush the planning process	Take as much time as you need to discuss and debate your choices thoroughly in the strategy team.
Be overly ambitious	Set boundaries for your plan which are challenging but are also realistic.
Forget to consider how you will implement	Be aware of what individual objectives might require in terms of time and resources before you prioritise them.
Forget to keep the director up to date	Take time to explain the logic behind the team's choices and decisions and get the director's approval before you move into the Implementation phase.
Define objectives which overlap, conflict or compete with one another	Ensure that individual objectives are in alignment (i.e. that they fit together and compliment one another.)
Delay implementation by trying to "perfect" your plan.	See your strategic plan as a work in progress and start implementing as soon as possible.

Once you have gone through the three steps in the Planning phase you have set the agenda for your strategic plan. You now know the answer to the question:

WHERE DO I WANT TO GO? I WILL GO THERE.

Don't be fooled into thinking that you are now prepared for everything. You are not (and you never will be!) Sooner or later the future is going to throw unexpected events in your path. The strength of your plan will be determined by how well it can stand up to these tests.

The Implementation Phase

A little less conversation, a little more action.

(Elvis Presley)

The best made plan in the world is worth nothing if it is not implemented. Even some of the largest corporations make the mistake of thinking that their strategy-making process is finished once they have a plan. What happens then? The plan is put into a folder, placed in a desk drawer and forgotten about. This is a terrible waste of all the previous efforts because the strategic plan is *__not__* an end onto itself.

Earlier it was stated that the Analysis phase is the most time-consuming aspect of making a strategy and the Planning phase is the most challenging. Together, the Analysis and Planning phases have formed the "heavy" part of your strategy development. Relatively speaking, the Implementation phase is **much easier** because it is here that the strategy becomes **integrated into your daily work.**

Thanks to the Analysis phase you know where you have started from and thanks to the Planning phase you know exactly where it is that you want to go. All that remains now is to figure out

HOW WILL I GET THERE?

In your strategic plan you have defined the priority action areas, concrete objectives and desired results for your inclusion work over the next 3years. Now it's time **to connect those objectives with people, deadlines and costs**. This process is what turns your ideas into action.

Failing to turn ideas into action is where most strategies fall apart. Many organisations spend huge amounts of time and money to make a perfect strategic plan but when their staff workers read through it, it means nothing because there is *no description of what is supposed to happen next*. This makes it easy for the staff to ignore the plan. Why shouldn't they? In practice it has absolutely nothing to do with them.

Your strategy is not 100% complete until you have clearly described how you intend to achieve the objectives and results listed in your strategic plan. Therefore the first step in the Implementation phase involves **outlining the specific steps you and your colleagues in the NA are going to take**. This is called making an **action plan**.

MAKING AN ACTION PLAN

An *action plan* is the guideline which lays out what must be done, who is responsible for doing it, the resources which will be needed (human and financial) and the timeframe in which it will be done.

In order for your inclusion strategy to be truly effective you need to define an action plan for each of the objectives on your list. The precise form of your action planning will depend on the possibilities within your National Agency.

In reality, an action plan not very different from **a "to-do" list** but the success of your strategy is largely dependent on **how well your "to-do" list is put together**. Your action plan should provide clear answers to the following **questions**

- What <u>specifically</u> do you want to achieve? (*define short-term objectives*)
- How do you intend to achieve it? (*define the tasks*)
- Who will do it? (*define the responsibilities*)
- When will it be done? (*define the timeframe*)
- How much will it cost? (*define the budget – this can be expressed in terms of money OR in terms of time*)

At first glace this may seem difficult but in fact you have already laid the groundwork during the Planning phase. You have already defined objectives AND the concrete results you want to see (point 1above). Now it is a relatively simple matter of **plotting out the steps** that will get you there.

Your **strategic plan** has clearly named the results you want to see for every objective within a **3-year period.** While it is possible to make an action plan stretching over 3years, this is probably a little too ambitious. A lot of things may change in your NA over 3 years (old staff leaves, new staff joins, money leftover in the budget this year, no money next year, political and economic changes affect your target groups, etc.) To keep things simple, consider limiting your **action plan** to a period of no more than **1 year** (in fact many organisations refer to their action plan as a "**year plan**").

"The work involved in the Implementation phase is too much to be left solely to an Inclusion Officer. There is a big need for extensive support from other staff members. "

(Agnieska Moskwiak, NA Poland)

The most thorough approach is to develop an action plan for each of the objectives defined in your strategic plan. If we use the objective defined by NA "No-Country" as an example (presented in step 3 of the Planning phase above), their action plan for the first year might look something like this:

✹ Example – NA "No-Country"

NA "No-Country" has set itself the 3 -year objective of increasing the participation of young women from ethnic backgrounds to a minimum of 2o persons per year in each separate Action of YIA. At this time the NA has no links with organisations working with this target group and has little information about the situation of these young women.

The NA decides that in Year 1their efforts need to focus on building up contacts with organisations, getting to know the needs of the target group, presenting the YIA activities to potential partners and supporting the organisations to make their first project applications by the September 1st deadline.

These short-term objectives are then broken down into tasks as follows:

Action Plan

Objective: To increase the participation of young women from ethnic backgrounds to a minimum of 20 persons per year in each separate Action of YIA.

Step #	Task	Person responsible	Start date	End date	Progress	Cost
1	Research organisations working with the target group. Establish first contact with orgsby telephone. Issue written invitation to 1o-15 orgs to a "networking day" at the NA.	Zohra	10 Jan.	31 March	75% complete	25 hours
2	Developing programme for networking day - intro to NA's inclusion strategy - intro to activities in different Actions	Lucy	1 Feb.	31 March	50% complete	16 hours
3	Logistical arrangements for networking day - room bookings - materials - equipment - lunch	Xavier	1 Feb.	31 March	100% complete	16 + 150 euro (lunches)
4	Follow-up on inquires from organisations after networking day. Making contacts with new organisations.	Zohra	1 April	31 Dec.	Not started	40 hours
5	Active support for those organisations expressing interest to submit project applications for Sept 1	Tanya	1 April	1 Sept	Not started	40 hours

(Source: Adapted from Erica Olsen: "Strategic Planning for Dummies", 2007.)

The example on page before demonstrates how the 3 -year objective is broken down into specific tasks. Responsibility for each task is designated to the appropriate staff member. Next, the tasks are put into a clear timeframe. An estimate of the cost of each task is included as an extra guideline.
The plan also leaves space for a progress report which indicates how close each task is to completion.

Notice that in this example the costs are expressed largely in terms of time. Not every task will directly cost the NA money, but they will certainly cost staff time. Including a time estimate in your action plan can be very useful because in most NAs the time for inclusion work is extremely limited. If a staff worker is spending time on one area, they obviously have less time for other tasks.

The example above shows how much work is required for just *one* **objective** within a period of just *one* **year**. Remember that you have probably identified 2or 3or even more objectives for your NA.

Each separate objective should have its own separate action plan. Although it sounds like a lot of work, separate action plans are needed in order to outline clearly what should be done and who should be doing it.
When the separate action plans are compared against one another, it is easy to see if different objectives are competing or overlapping with one another (for staff time or other resources).
This is also a good way to judge if you can realistically achieve your objectives within the time defined (if not, take steps to change your course right away).

There are many **advantages** to using action plans:
- Each person knows their job
- Each person knows where their responsibilities end
- Each person knows what their colleagues are doing.
- Each person is working towards clear deadlines
- Each person can see what progress is (or is not) being made at a glance

In the event that specific tasks are not completed, the action plan can help to show where things have gone wrong. Was the task clear? Was enough time allocated? Did the staff member(s) have the right competencies to do the task? Should more people have been involved? Were the financial costs higher than anticipated? This will provide valuable information to help the team avoid problems in future.

Be aware that some people in the NA may resist the idea of using this kind of action plan. Not everyone likes to feel that they are being controlled or regimented to such a degree. The aim of an action plan is definitely **not** to restrict people's creativity or flexibility. **An action plan is a guideline and is meant to clarify who is meant to be doing what within a specific period of time**. One good way to get people enthusiastic about action plans is to actively involve them in the process. Don't let the strategy team have all the fun – ask the other staff members to help define tasks and timetables that will allow them to contribute to achieving the 3 - year objectives.

"When the team reaches consensus on how to share responsibilities, each person confirms their tasks in writing by e-mail to avoid further debate and discussion. The senior manager confirms whether people can spend the time and money on the tasks defined."

(Olga Rey, NA UK)

ACTION PLAN VS. WORK PLAN

Each year National Agencies are required to provide the European Commission with their annual work plan. Is there a **difference** between an action plan and a work plan?

There is a certain amount of overlap between the two but the main difference lies in the **amount of detail required**.

- An NA's annual **work plan** provides the EC with a general overview and summary of the work they intend to do in the coming year.
- An **action plan** (in the context of a strategy) should be linked to a specific objective and outlines in detail the tasks and timeline for individual staff members.

The amount of detail needed for an action plan is probably too much for the EC's purposes. However, once the NA has developed **action plans for each of their objectives, they then have all the information they need for the work plan** (at least in terms of inclusion!). The EC does not need to know what each member of your staff will do for the next 12months but they do need to know what the NA is working towards and what they plan to do to get there. The NA has this information in the form of its objectives, desired results and a summary of the tasks to be done in the coming year.

MONITORING YOUR STRATEGY

Despite all the effort to define objectives and lay out action plans it is still very easy for a strategy to get off track. There are any number of circumstances, internal as well as external, that could impact your strategy. For **example**, staff turnover in the Agency might mean that it is no longer possible to achieve certain tasks within the defined timeframe. Key inclusion project promoters may decide they no longer wish to take part in YIA activities. Economic and/or political changes may seriously affect specific fewer-opportunity target groups. Most of these changes cannot be predicted in advance.

Drastic changes in an NA's situation do not necessarily mean the end of your strategic plan but they do demonstrate the importance of keeping on top of your strategy at all times. This requires **active management**. This process is often referred to as monitoring.

Monitoring is the systematic collection and analysis of information as your strategy progresses. Monitoring helps to keep the work on track and can let the strategy team (or management) know when things are going wrong. It enables you to determine whether the resources you have available are sufficient and are being well used, whether the capacity you have is sufficient and appropriate, and whether you are doing what you planned to do. *(Shapiro)*.

In its most basic form, monitoring takes place each time an individual staff member checks their tasks listed on the action plan. However, if implementation is to be as effective as possible the NA needs to adopt a more structured approach.

It is good practice to hold monthly meetings to review the status of the different tasks in the action plan. You can also use this time to look further to see if you are still on track to achieve your 3 -year objectives or if changes need to be made.

Method – Traffic Light
One simple way to prepare monthly review meetings is to use the "traffic light" method which **indicates and charts your progress**.

For example, if you are half-way through a year where your objective is to increase the participation of rural youth to a total of 50 young people and to date you have included 25, the status of this target is **"green"**. If, by contrast, you have included 18 then the status is **"yellow"** and the point needs to be discussed at the next meeting. If however you have only included 10 young people, then the status is **"red"**.
This indicates that urgent action is required or that the desired result has become impossible to achieve. *(Bruce & Langdon)*

Naturally, monitoring consists of more than just monthly review meetings. It is up to each NA to develop a monitoring system which best suits their situation and objectives. Listed below are several types of action, each of which is necessary for making an effective and efficient monitoring system. These actions can be described as the **seven "R's"**:

- *Reinforcing* your inclusion strategy by making it a part of the day-to-day work of the NA. Take at least 15 minutes in each staff meeting to provide the team with a strategic update. Paying regular attention to strategic planning and charting your strategy's progress should become an integral part of your NA's working culture.
- *Replacing* some regularly scheduled staff meetings with strategy meetings. The purpose of such meetings is to discuss the status of your plan. This is the moment where you can cross off tasks that have been completed and troubleshoot if certain things are not going as they should.
- *Reviewing* your targets regularly (not just during meetings) to see what has been accomplished and what has not. Make improvements to systems, task assignments or timetables whenever necessary. When a certain number of your targets have been reached, set new ones. (Remember that it is healthier for your team to achieve simpler targets than to fail on overly-ambitious ones.)

- *Recording* your progress as time goes by. Team members will be more motivated to keep working towards the objectives in your strategic plan if they can actually see things moving forward. Aim to produce a short written progress report once a month.
- *Reporting* the current status of your strategic plan regularly to the strategy team, the director and as well as to the rest of the staff in the NA. Don't de-motivate people with pages and pages of information. Give only as much detail as people really need.
- *Recognising* and rewarding the team regularly for the hard work they put in to complete their tasks. This will help to keep people enthusiastic and committed to the strategic plan as a whole.

Effective monitoring of an inclusion strategy requires a combination of **flexibility** to deal with the unexpected and **authority** to keep people on track, on schedule and on budget (*Olsen*).

An NA needs to be ready to respond creatively to new developments in inclusion without constantly having to remake the entire strategic plan. At the same time the office requires a strong guiding hand to make sure each member of the team remains committed and focused on their targets.

From Planning to Implementation – NA Poland

The Polish NA has one designated Inclusion Officer for each separate Action. All the officers are involved in selecting one target group as the focus of their inclusion strategy for the coming year. In the Planning phase, the NA takes time to investigate the current situation of the target group. Both young people and youth workers are involved in the process. Based on the outcomes, the NA formulates an action plan by taking decisions on which concrete steps are needed, how much money can be allocated, which resources are available, etc.

In the past, the action plan has been started off by means of a promotional campaign designed to reach young people in the target group. This involves spreading information in magazines and newspapers aimed at young people. Each Inclusion Officer provides the information to be published while the "main" Inclusion Officer oversees the process. Meetings and seminars are also used to introduce people to YIA activities and to establish contact with new potential project partners.

As the implementation phase progresses regular moments of revision are scheduled to see if things are moving forward. Inclusion Officers in the different Actions follow up on

participants from the meetings and seminars through phone calls, evaluation questionnaires and so on. Usually the response from project promoters is quite good. The Inclusion Officers also keep close track of statistics in their own Action (the number of projects, the number of young people taking part, etc.) At the end of the year the period is reviewed to evaluate the quality of projects and the level of success in including the target group. The director of the NA oversees the entire process but is not directly involved.

DEALING WITH CHANGE

An army general once said "No plan survives contact with the enemy". The real test of your strategy will be to see how well your plan stands up when it makes contact with "the real world". When you start to implement, there is a very good chance that things will **not go quite the way you expected**. When this happens, the NA needs to be ready to adapt and adjust as necessary.

Plans are essential but they are not set in stone. If they are not working, or if circumstances change, then plans need to change too. **The field of inclusion is known for its high degree of unpredictability**. An NA cannot possibly foresee all eventualities that might impact their inclusion strategy. Monitoring is the tool which helps the NA to know when plans are not working and when circumstances have changed.

Monitoring gives the strategy team the information it needs to make decisions and changes as necessary. (*Shapiro*)

One of the advantages of developing a good strategic plan is that even in a fast-changing field like inclusion your strategy provides you with a basis on which to evaluate new opportunities. Although it can be frustrating to have to re-draw your action plan or, in dramatic cases, to have to go all the way back to re-define your priorities and 3 -year objectives, try to see such moments as challenges rather than setbacks. **A change in circumstance offers the strategy team the chance to find better options or to improve the working methods defined earlier**.

Your monthly review meetings provide you with a platform to discuss difficult situations and to propose new ideas. It is a good idea to **compliment monthly meetings with an annual review of your strategic plan** (3 -year objectives, desired results and yearly action plan) to re-examine whether or not the overall direction of your inclusion strategy is still on track.

When dealing with change the strategy team should keep in mind that while they should be open for new opportunities they should also not be afraid of getting rid of ideas or action plans that are no longer relevant. At the end of the day, strategy-making is all about keeping up to date and constant improvement.

☞ *The sections on Monitoring and Dealing with Change have taken many ideas from Strategic Thinking, Andy Bruce & Ken Langdon, Dorling Kindersley Ltd, 2000*

"Monitoring is a big challenge in the implementation phase. The key to an (inclusion) strategy is ensuring that all systems are functioning properly. This requires time and money and NAs do not have much of either."

(Gilles Baccala, NA France)

DO'S AND DON'TS IN THE IMPLEMENTATION PHASE

One of the main challenges for the strategy team in the Implementation phase is finding a balance between too much or too little structure and too much or too little freedom for the team. While implementing your strategy, be aware of the following do's and don'ts:

Don't	Do
Limit the responsibility for implementation	Encourage ownership of the strategic plan throughout the entire team by giving each person a role to play.
Forget the importance of communication	Present and explain the strategic plan and its specific objectives clearly to the rest of the NA staff so they know how they are expected to contribute.
Separate the inclusion strategy from other tasks	Make the inclusion strategy an integral part of the NA's daily work.
Underestimate the need for updates	Produce regular progress reports so that the entire team knows the current status of the strategic plan.
Miss out on opportunities to motivate members of staff	Empower staff members by giving them the authority, responsibility and tools necessary to impact their own area of work.

Taking the time to work out a series of action plans provides you with an outline of how to achieve your objectives and desired results. Taking a conscientious approach to your monitoring will help make sure you don't lose your way as weeks and months go by.

You now have the answer to the question:

HOW WILL I GET THERE? LIKE THIS.

When you reach this point in your strategy-making, you should have answered virtually all of the questions related to your inclusion work for the next 3years. Now it's a question of getting to work and doing everything in your power to help your team reach the objectives and desired results defined in your strategic plan.

> The Evaluation phase
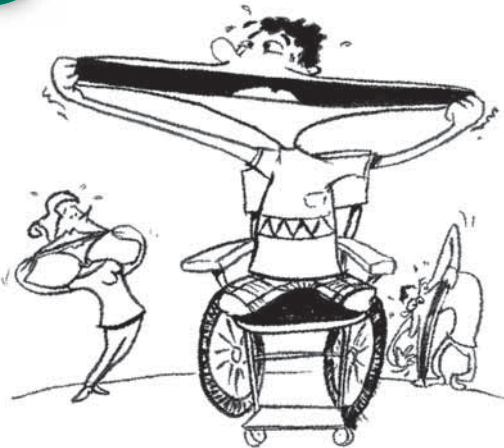
"Not everything that counts can be counted, and not everything that can be counted, counts."

(Albert Einstein)

It has been said that projects progress quickly until they become 90% complete and then they remain 90% complete forever. Unfortunately the same holds true for a strategy. While most people agree on the importance of evaluation in general, the Evaluation phase is the stage that most people **are likely to rush through or even to ignore completely**.

Of all the phases involved in strategy-making, the Evaluation phase is the **most "cyclical"** because in practice evaluation takes place at many different moments throughout the whole strategy-making process. In this section, however, we will focus on evaluation of the **outcomes of your inclusion strategy as a whole**.

WHAT IS INVOLVED IN EVALUATION?

Evaluation is the comparison of actual results against your original strategic plan. An evaluation looks at what you set out to do, at what has been accomplished and at how you accomplished it. Your evaluation is what allows you to measure the extent of your success and the level to which you did or did not achieve your goals. Evaluation can also indicate whether your level of success in inclusion justifies your investment of time and resources.

Evaluation is most effective (and arguably most enjoyable) when you have taken time in advance **to plan what kind of progress and achievements** you hope to see. In order to evaluate properly, you need to have established **a baseline (starting point)** from the very beginning which gives a clear overview of the situation before you began working on your inclusion strategy. For instance, if your objective is to increase the participation of early school leavers in YIA by 50%, you need to know what their level of participation was at the very beginning. If you invested the time required for a thorough needs analysis, your NA should have established such a baseline thanks to the work done in the early stages.

It can be useful to stop and take time to understand the purpose of your evaluation before you get started:
- *Why* **are you carrying out an evaluation**? After investing so much time and resources you should be curious to know the real results and whether all your work has been effective or not. You should be interested in learning from all the experience gained and hopefully you are interested in sharing the outcomes with others. Generally speaking it is good practice to evaluate your inclusion strategy even if you are not obliged to do so.
- *What* **is the evaluation for?** Your evaluation should be designed for a specific purpose because this will determine what you will try to measure and what data you need to collect. For instance, if your purpose is to produce statistics on participation levels you will use different methods than if you want to measure cost-effectiveness.
- *Who* **is the evaluation for?** The profile of your audience will affect your approach to your evaluation. For example, is your evaluation meant for internal purposes only or do you need to show your results to clients, to funders, to politicians or to the media?
- *When* **does the evaluation need to be completed?** Knowing your timetable will help you to structure your evaluation. For instance, will you evaluate continuously, at a halfway point or only towards the end of the period defined in your strategic plan?

These points should be discussed and agreed by the strategy team **in the Planning phase.** Waiting until your inclusion strategy has already been in place for some time will make evaluating much more difficult.

☛ *The section on evaluation has taken many ideas from the UK Home Office's publication "Passport to Evaluation" and Janet Shapiro's toolkit "Monitoring & Evaluation" (see list of* **references***).*

EVALUATING AN INCLUSION STRATEGY

When it comes to inclusion, there are three main areas for NAs to consider in the Evaluation phase:
- The *results* of your inclusion strategy
- The *impact* of your inclusion strategy
- The *process* of your inclusion strategy

All three of these areas are needed in order to have a complete picture of the level of success of your inclusion strategy.

EVALUATING RESULTS

An evaluation of the *results* of your inclusion strategy will show you to what extent you have achieved your objectives. Depending on the priorities your NA chose in the Planning phase, results can be *quantitative* (how much or how many - e.g. the number of participants or the number of inclusion-themed projects) as well as *qualitative* (how good – e.g. improving the quality of individual projects).

If you managed to identify SMART objectives back in the Planning phase (objectives which were concrete, measurable and defined by a timeframe), you will very quickly see whether or not those results have been reached (in fact you will likely have seen this already during your monitoring in the Implementation phase).

What takes more time, however, is making sure you know <u>how</u> those results were achieved. Was it thanks to expert planning or did sheer good luck play a role? Similarly, if you did not achieve your desired results, do you know why not? What challenges or obstacles blocked your success? Could these have been anticipated and dealt with ahead of time? Would you know what to do if similar circumstances arose in future?

EVALUATING IMPACT

An evaluation of the *impact* of your inclusion strategy looks to see if all your work has made a difference to the problems or situations you were trying to address. In simple terms, was your inclusion strategy useful? Can you **recognize any changes as a result** of your inclusion work to the young people, to the NA, to the project promoters or to the local community? Before you set out a new strategic plan you need to be sure that what you have done to date made sense in terms of the impact you wanted to achieve.

Evaluating impact is more challenging than evaluating results because impact is extremely **difficult to quantify**. As a result, the NA will likely collect a large amount of qualitative data. It is more difficult to analyse qualitative data, especially when answers are free form such as you would get from interviews or comments in questionnaires. To analyse this information NAs need to look for **patterns in the feedback** received and use these to draw general conclusions.

EVALUATING THE PROCESS

Very often organisations forget to pay attention to evaluating the *process* involved in developing their strategy. Depending on your approach to strategy-making, evaluating the process will likely mean taking a close look at the **internal procedures** and **decision-making processes** within the team. It could also mean evaluating other aspects like communication between the strategy team and the rest of the NA, the role of individual team members, the contribution of external stakeholders, etc. Some **general guideline questions** to help you get started could include:

- Which systems, methods, structures or stakeholders were helpful in the strategy-making process? Why?
- Which systems, methods, structures or stakeholders were <u>not</u> helpful in the process? Why?
- Were resources (human, financial, time, etc.) used as efficiently as possible?
- How sustainable is the way in which the NA worked?
- What changes or improvements are needed before the next round of strategy-making?

STRUCTURING THE EVALUATION

Evaluation does not just happen on its own. Like so many other aspects in the strategy-making process, evaluation requires planning. Not every evaluation will be carried out the same way but as a general guideline the process should include the following **steps**:

1. *Preparing* – set the aims and purpose of your evaluation. Why is it necessary? Who needs it? Who will do it?
2. *Designing* – define the objectives of the evaluation, namely what exactly is going to be evaluated. This will help you determine what indicators and criteria you will use and when the evaluation needs to start.
3. *Collecting the information* – gather the necessary data. Using a mix of methods will provide you with a more rounded overview of information from different perspectives.
4. *Interpreting the information* – determine what the data you have collected really means.
5. *Assessing the results* – draw conclusions out of the information collected. Use those conclusions to make recommendations for the future.
6. *Implementing the results* – take action on the recommendations that have been made.

There is a wide variety of methods and techniques available that NAs can use to help them with the preparation and design of their evaluation as well as for collecting and interpreting information The methods you choose will depend on the scope and duration of your strategic plan as well as on the resources available to you in your NA.
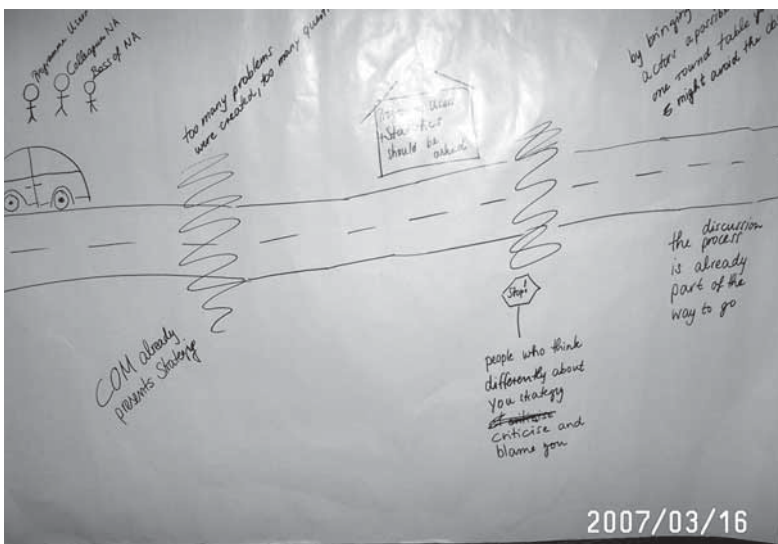
☞ Some examples are included in the **Toolbox** on page 100.

From the Round Table Meeting on inclusion strategies

AVOID CONFUSING DIFFERENT LEVELS

NAs need to keep in mind that **evaluating the results or impact of the inclusion strategy is <u>not</u> the same as evaluating the results or impact of individual inclusion projects**. It is very easy to mix up different elements and thereby to draw the wrong conclusions. Project evaluation and strategic evaluation are two different levels and need to be kept separate from one another.

For instance, imagine that an NA wants to reach a new target group and decides to run a 1-week youth exchange as a pilot project to get to know the group's needs. During the youth exchange many unexpected problems come up and the week proves to be difficult for all of the participants. Nevertheless a lot is learned and the exchange highlights many aspects that need to be considered when working with this new target group in future.

What can be concluded here? The youth exchange itself may not have been a success but on strategic level the idea to first do a pilot project proved to be the right thing to do. Just because the pilot project turned out to be more difficult than expected does not mean that the strategy was incorrect. In fact, the opposite is true; the strategic choices turned out to be the right ones.

Evaluating your inclusion strategy means looking to see if the objectives you chose were the right ones and whether or not the path you chose was the best one to follow. You can avoid the risk of confusing different levels of evaluation by clearly defining what it is you want to evaluate *before* you begin.

AFTER THE EVALUATION

All the work you put into evaluation will be of little value if the NA does not follow up and take action on the outcomes. Once you have your evaluation results in the form of conclusions and recommendations, there are several important **steps** for the NA to take:

- *Learn from the process* – by learning what worked and what did not, what you did right and what you did wrong, your NA is empowered to act in an informed way in future. The purpose of learning is to make changes where necessary, and to identify and build on strengths where they exist.
- *Report to your key stakeholders* – it is likely that those individuals, groups or organizations that played a role in your inclusion strategy will be highly interested to know what the specific outcomes were.
- *Decide how to move forward* – take stock of what is now going on in inclusion. Is it time to define new priorities and objectives? Is a new needs analysis necessary?

WHAT SHOULD HAPPEN WITH THE RESULTS?

After putting in time and effort to thoroughly evaluate their inclusion strategies, it makes sense for NAs to publicise the results as widely and as often as possible. The documentation on Youth in Action refers to this process as *the dissemination of results*. In essence, this means that one of the final tasks in the inclusion strategy is for NAs to share the outcomes, both good and bad, with the appropriate audiences.

There are a variety of **methods** NAs can use to disseminate the results of their inclusion strategy including:
- *Documenting* – record the most essential outcomes for the strategy team and the rest of your colleagues in the NA
- *Publishing* – spread the results to a wider audience. Consider using a variety of tools including reports, brochures, websites, newsletter articles, Youthnet, etc.
- *Participating* – take part in relevant meetings and events and take the opportunity to present your strategy and its results whenever possible.

No matter how or when you are presenting your results, always remember to keep things short and simple. All your work is wasted if the end results cannot be clearly understood.

It's easy to see dissemination as the last priority on your long list of things to do. However, don't forget that much of what is known today about inclusion in YIA was gained from the feedback received from young people, project promoters and NAs all across Europe. There is still much to be learned so keep in mind that disseminating the outcomes of your strategy could benefit the inclusion field in many ways for a long time to come.

DO'S AND DON'TS IN THE EVALUATION PHASE

Evaluation is the phase where we are most likely to rush or to accept compromises because there just never seems to be enough time or resources to do things properly. Be careful that you don't get careless just because it's the end of the ride. Keep the following do's and don'ts in mind as you start to evaluate:

Don't	Do
Neglect to allocate enough time for evaluation	Budget sufficient time and resources for the final evaluation of the inclusion strategy by including it as part of your action plan.
Become complacent and think that "we're doing everything right".	Review and reflect regularly to see if you are *still* doing everything right.
Claim hard-to-prove results or make links between unrelated outcomes	Consider the outcomes of the evaluation carefully and draw only conclusions which can be backed up by hard evidence and clear facts.
Overlook or forget about recommendations	Assign responsibility for follow-up of the to specific team members. Draw up a timetable for action to be taken on the recommendations put forward.

Congratulations - you've done it! You have successfully completed each of the four phases involved in strategy-making. You should be proud – if you have gone through the four phases you have shown discipline and commitment. You have also taken a huge step forward in making your inclusion work the best it can be.

You have already learned an incredible amount about what it takes to think and act strategically. This section presents a few final words of advice and outlines **some extra tips** to make your inclusion strategy truly outstanding.

ROUNDING OFF

CHECKLIST FOR AN INCLUSION STRATEGY

Putting together an inclusion strategy is a process that stretches from the Analysis phase right through the Planning and into the Implementation phase. It's a good idea to stop and take a break at different moments during this process to check to see if your inclusion strategy meets a few fundamental criteria:

- **Is it understandable?** If your strategy seems to be mainly a bunch of fancy-sounding words, something has gone very wrong. Your strategy should be clear and concise – no jargon or mumbo-jumbo! Ask yourself: if a new staff member joined the NA tomorrow, would they be able to understand your strategy?

- **Is it realistic?** It's easy (and tempting) to make hugely ambitious plans, but in reality you are wasting your time if the NA is not in a position to implement them. The people on your team need to feel challenged by the strategic plan but not overwhelmed by it.

- **Does it respond to real needs?** Strategy-making is a long-term process and it is surprisingly easy to lose your focus. Check regularly to see if the plans you make and the priorities you choose are still addressing real needs inside and outside of your NA.

- **Does it have the approval and support of the director?** The role of the director of the NA in the strategy-making process cannot be over-emphasized. Your director is a key figure at every stage of the process. Even if your director does not attend every monthly review meeting, it is vital to keep them up to date on all developments and to have their approval of all strategic decisions.

- **Is it agreed?** Any major differences of opinion at any stage of the strategy-making process need to be dealt with immediately. There is nothing more deadly to a strategy than team members who, for whatever reason, do not support it.

- **Does it energize people?** Despite the fact that strategy-making requires a lot of effort, it should be a highly motivating process that gets people turned on and excited about their job. If your team gets behind the objectives of the strategic plan and is eager to get down to work it's a good sign that you are on the right track!

COMMON PITFALLS

While there are some strategic geniuses in the world, most of us get through the process as best we can. Remember there is no such thing as a perfect strategy and there is no such thing as a "wrong" strategy. Don't expect yourself to deliver a perfect product, especially your first time around, but do be aware of the following **common pitfalls** and take steps to avoid them:

- **Making too-big or all-inclusive strategies** – we are easily seduced by the myth that a strategy has to be a huge monster-sized plan but you are not doing anyone a favour if your strategy is too big or if it tries to go in too many directions at once. Keep your strategic plan as simple and as focused as possible.

- **Being too far away from your target group** – too often organisations make plans based on what *they* think that their clients need or want. This is a recipe for failure. Talk to your target group and take the time to get to know them. They are the foundation that your strategy should be built on. If the foundation is shaky, it won't be long until the plan comes crashing down.

- **Failing to admit when things go wrong** – face it, you're only human. At some stage in the strategy-making process something is going to go wrong. Although no one likes to admit making mistakes (bad decisions, wrong priorities, ineffective action plans, etc.) don't try to hide from the problem. Instead, come up with action steps to put things right again. Remember that you cannot change the problem if you don't acknowledge it.

- **Failing to adapt to change** – after investing months in collecting information and developing plans the last thing anyone wants to do is start over when circumstances change but remember that strategy is all about being prepared to deal with change. Except in cases of dramatic upheaval, it is unlikely that you will have to start the entire process over again from scratch. Most changes can be dealt with by just a few simple adjustments to your plan.

- **Working in isolation from other bodies** – it's easy to see strategy-making as a purely internal process. It's *our* strategy so only we should be involved, right? Wrong! No organisation exists in isolation. Be aware of your position in relation to other bodies and stakeholders. Take their strategies, opinions and actions into account. Be open to their input and weigh it carefully when it comes time to make decisions for your own organisation.

EXTRA TIPS FOR SUCCESS

If you have gone through the checklists above you are already on the fast-track to strategic success but here are a few more tips to help you along the way:

- **Write it down!** The most successful strategic plans are those which are written down. Why? The act of writing out your plan forces you to think through your ideas and express them clearly. Writing your plan not only makes it easier to share with stakeholders it also makes it easier for you to measure your progress along the way.

- **Make it your own.** This booklet presents a range of advice and methods which aim to help you navigate through the strategy-making process. However, at the end of the day it isup to you to choose a way of working which best suits your NA. Use the methods outlined here that you think will work for you. Ignore those that won't. Don't become too pre-occupied with doing things the "right" way – just get on with doing it.

- **Involve young people.** The most important stakeholder in the inclusion strategy process is the young people themselves. It is not easy to know how to involve young people from fewer-opportunity backgrounds in strategic development but their voice needs to be heard (and not just through their youth leaders and youth workers). Try to find different ways and different moments to allow young people to take part in the process.

> "There are only 2 of us on the inclusion team in the NA and sometimes we feel alone on our inclusion island — few new discussions to join into and few new concrete tasks to take up. It feels really good to hear about what our colleagues in other NAs are doing in inclusion."
>
> *(Karin Schulze NA Germany)*

- **Link in with other NAs.** Other NAs in the network might be facing the same types of challenges in their inclusion work that you are. Some of them will likely be interested in working with the same specific target groups. Of course each NA has to come up with an inclusion strategy which responds to its own distinct situation but there is much to be learned and gained by co-operating with the other offices whenever possible.

WHAT DO YOU DO WHEN YOU REACH YOUR GOALS?

The very first thing you should do is to **celebrate**, of course! Strategy-making is a long-term undertaking so it is very important to recognise when you reach important milestones along the way. Did the NA manage to achieve one of its major objectives? Treat the office staff to a nice lunch, throw a party or take Friday off. Taking time to reward the team for their hard work is a great way to keep up their motivation for the next round of tasks.

Beyond celebrating, the other important step is to stop and look again at your overall strategic plan. If you have achieved certain objectives, you now have room to work towards others. Remember that **list of leftover potential action areas** you made back in the Planning phase? This is a good moment to look at them again to see if they should now be prioritised and integrated into your yearly action plan.

FINAL WORDS

The theory and methods presented in this booklet are not only relevant for the field of inclusion. They can be applied to just about any area where a strategic approach is needed whether inside or outside of the NA. Feel free to adapt the ideas and tools presented here to suit your own specific situation.

If you still find the idea of making your own inclusion strategy a bit overwhelming, take heart. Strategy isn't about trying to achieve perfection. Strategy is a way that you decide to work over the long term (*Nelson & Economy*).

An inclusion strategy is very much a work in progress. You will have to review, re-think and revise several times before you feel like you have everything right. There may be moments when you feel exhausted, frustrated or just don't know how to go on. Whatever happens, keep trying. Don't see the work involved as a chore - see it instead as the best possible investment you could make with your time and effort. Drawing up a strategic plan is arguably one of the most important things you can do for your NA's work on inclusion.

TOOLBOX
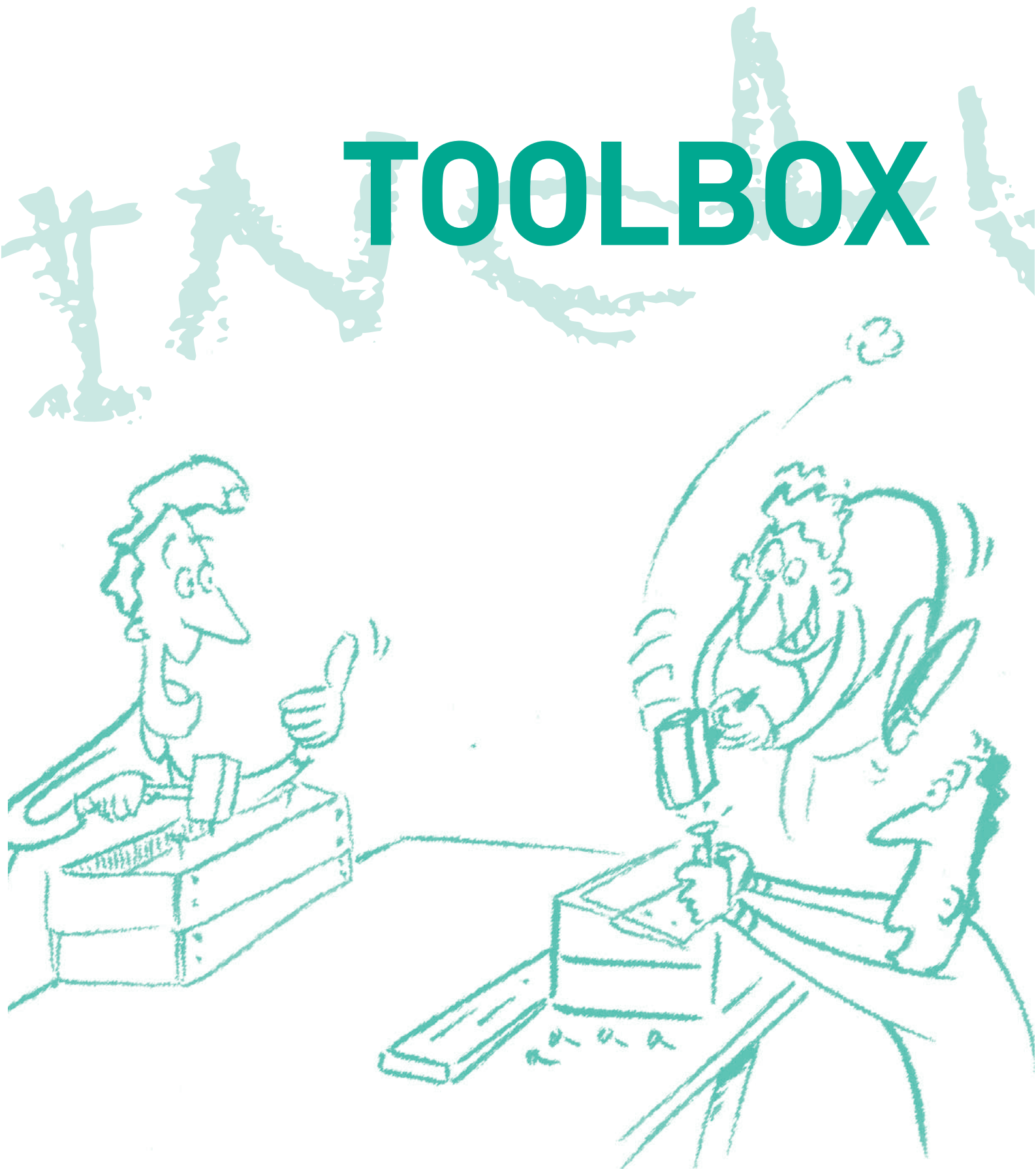
The theory behind putting together an inclusion strategy is relatively simple but it is not always easy for National Agencies to know how to put theory into practice.

This section presents a variety of tools to help members of the strategy team turn theory into action. The different tools correspond to the four phases of strategy-making and have been adapted to suit NAs and the specific needs of the inclusion field as much as possible.

The methods included here are just the beginning. A wide variety of strategy-making tools can also be found in print and on the Internet. As a starting point, we encourage you to try out the tools presented here and to adapt them as necessary to suit your needs.

Tools for the Analysis Phase
- Statistical Overview
- Stakeholder Analysis
- Inclusion Task Indicator
- Close-Up on the Competition
- PEST Analysis
- SWOT Analysis

Tools for the Planning Phase
- SWOT Interplay
- Paired Comparison Analysis
- Setting SMART Objectives
- Evaluating Your Strategic Plan and the Planning Process

Tools for the Implementation Phase
- Outline of an Action Plan
- Monitoring the Strategic Plan

Tools for the Evaluation Phase
- Overview of Results Achieved
- Final Review of the Strategic Process

TOOLS FOR THE *Analysis Phase*

STATISTICAL OVERVIEW

Statistics can provide a quick and easy way to gain insight into your past inclusion work. The grid below can be used by NAs as a basis for determining what has been happening in inclusion from a quantitative perspective.

STEP 1 - For the last five years, provide statistics for the following categories for **all** Actions of the Youth in Action programme (Action 1.1, Action 1.2, Action 2, Action 4 .3 , Action 4 .5, etc.):

Category	20_ _	20_ _	20 _ _	20 _ _	20 _ _
The number of inclusion-themed project applications received					
The number of inclusion-themed project applications granted					
The number of inclusion-themed projects carried out					
The number of inclusion-themed projects carried out by newcomers (first time in the Programme)					
The number of fewer-opportunity young people participating in activities (incoming and outgoing)					
The number of inclusion-themed trainings offered on national level					
The number of participants in inclusion-themed trainings offered on national level					
The number of participants sent to inclusion-themed trainings offered abroad					
Etc.					

STEP 2 – Discuss the results in the strategy team. Which areas show the biggest increases and why? Which areas show the biggest decreases and why? Can these changes be explained? Can you see any general trends?

STEP 3 – On the basis of statistics, which areas are most in need of improvement? Can you already suggest steps for concrete action?

The grid above is intended to be used as a basis. If you see a need to expand the grid to include other areas or to highlight specific details then do so. The more statistical information you have, the more complete your picture of inclusion will be.

☛ These types of statistics may not be readily available in your NA. If possible, compile whatever statistics you can (even if just for the past 1-2years) to have some kind of quantitative indication of what has been happening. If you have no past statistics, start keeping closer track of numbers as of this year so that in future you can more easily measure your progress.

STAKEHOLDER ANALYSIS

An important aspect of the needs analysis is identifying key stakeholders and taking time to understand their position, their needs and what they expect from the National Agency.

A stakeholder is an individual or group who has an interest in or who might be impacted by your strategy.

STEP 1 – brainstorm a list of all the NA's stakeholders (remembering that stakeholders can be clients, competitors or partner organisations). Split the list into *internal* stakeholders (inside the NA) and *external* stakeholders (outside the NA).

STEP 2 – Reduce the lists by selecting a maximum of 5 key internal and 5 key external stakeholders. Key stakeholders are those who are vital to the success of your strategy.

STEP 3 – Ask each stakeholder to reply to the following questions:

• What do you need or expect from the National Agency?
• What criteria do you use to judge our work?
• How well has the National Agency performed against those criteria (excellent, very good, fair, poor… over the past year, 2years, 3years…)? Why would you give the NA this rating?
• What do you need the NA to do more or less of?
• If resources were available, what additional activities or services should the NA offer?

Adapted from Worksheet 4 – Support Center for Nonprofit Management (1997).

INCLUSION TASK INDICATOR

In most NAs there is usually more inclusion work to be done than time to do it in. How has the Inclusion Officer used their time in the past? Is time being invested in the most necessary areas or is it being diverted towards lesser priorities?

STEP 1 – have a small group of 2-3persons write out a job description for an Inclusion Officer. Describe in as much detail as possible what tasks the Inclusion Officer should do and how much time per year should be devoted to each task. (Include the director of the NA in the group if possible, but do not include the Inclusion Officer.)

STEP 2 – have the Inclusion Officer estimate how much time they spent on each of the following categories over the past year (estimate the number of hours per task per year):

No.	Category	Hours per year
1.	Communicating inclusion information (e.g. on projects, events, training possibilities, tools, etc.) to clients	
2.	Communicating inclusion information (e.g. on projects, events, training possibilities, tools, etc.) to other NAs	
3.	Attending internal inclusion-themed meetings (e.g. staff meetings)	
4.	Selecting/approving inclusion-themed projects	
5.	Monitoring and follow-up (reports, finances) of approved inclusion themed projects	
6.	Field visits to inclusion-themed activities in your own country (in any Action)	
7.	Collecting annual inclusion statistics	
8.	Documenting examples of good inclusion practice	
9.	Evaluating inclusion-themed projects with young people	
10.	Evaluating inclusion-themed projects with project promoters	
11.	Monitoring and implementing the EC's Inclusion Strategy	
12.	Developing, monitoring and implementing the NAs national inclusion strategy	
13.	Co-ordinating a national working group on inclusion	
14.	Developing inclusion trainings and capacity building	
15.	Developing inclusion information materials	
16.	Doing reading and research into inclusion issues	
17.	Maintaining regular contact with external stakeholders (e.g. by telephone, networking meetings, etc.)	
18.	Disseminating and valorising results of inclusion projects	
	Total hours spent on inclusion per year:	

STEP 3 – Compare the job description with the overview of hours spent per task. To what extent do they match? To what extent are they different? Are you surprised by any of the results?

STEP 4 – What conclusions can be drawn from this exercise? What changes (if any) need to be made?

You can use this same exercise to review the time spent by other NA staff members on inclusion (e.g. Project Officers in different Actions, PR workers, etc.)

☛ The categories above were identified during the **Inclusion Staff Training** event (June 2007, Belgium). Take a look at the **report** on www.salto-youth.net/download/1386/ and for more information: www.salto-youth.net/InclusionStaffTraining/

CLOSE-UP ON THE COMPETITION

Competition exists everywhere, even in the field of non-formal youth work. When developing a strategy it is a good idea to have a clear picture of what other organisations in your field are doing and what they are striving for.

No matter what their situation, young people have different options to chose from (work, school, vocational training, collecting social benefits, staying home to watch TV…) Why should a young person choose to take part in a Youth in Action activity? Why should they (or their organisations) choose Youth in Action over other non-formal activities? To answer these and other questions it can be helpful for the NA to take a closer look at what the competitors in their field are offering.

☛ Competitors are **not your enemies** and gathering information about them is not "spying". Much of the information you need to complete this exercise can be found in public information like an organisation's annual report, publicity materials or on their website. The easiest way to get information is simply to ask for it – most organisations will be happy to meet with you to talk about their strategy and activities, especially if you return the favour. When doing your research, be sure to always respect people's boundaries (e.g. do not push for internal information like finances, etc.)

1. Make a short list of 5-10 the National Agency's direct competitors working in the field of inclusion (these can be governmental or non-governmental organisations).
2. What are the values, vision, mission and concrete goals of each of these organisations in terms of inclusion?
3. What activities and/or services do these organisations offer to young people from fewer-opportunity backgrounds?
4. How are these activities/services similar to the activities offered by the NA? How are they different?
5. What profile of young person typically makes use of these activities/services?
6. Do the young people have to pay a fee or contribute in some way in order to participate?
7. How many activities are run each year?
8. How many young people take part in the activities each year?
9. Over the last 3 years, have these numbers increased or decreased?
10. Compared to each individual competitor, what are the NA's greatest strengths (in terms of the inclusion work)?
11. Compared to each individual competitor, what are the NA's most serious weaknesses (in terms of the inclusion work)?
12. What conclusions can be drawn? What type of action is needed to improve the NA's position compared to its competitors?

PEST ANALYSIS

PEST stands for: **P**olitical, **E**conomic, **S**ocial and **T**echnological. A PEST analysis can help NAs identify current socio-economic issues and trends in order to gain more insight into how such issues may affect young people with fewer opportunities and their project promoters in future.

STEP 1 – Write out the title of each category (Political, Economical, Social, Technological) at the top of a piece of paper or a flipchart. Together with a partner or in a small group of 3 -4 persons, brainstorm as many trends or issues that you can think of per category(*). List all the outcomes on the paper. (For clarity, you can choose whether you want to identify issues which are relevant on local, regional or national level.)

STEP 2 – Discuss the issues with your partner or in the small group. What implications can you see for inclusion work in the NA? Which trends/issues are most significant for the NA's current and future work?

STEP 3 – Identify potential opportunities and threats for the NA under each heading and list them on a flipchart paper.

(*) Depending on the time available, you can consider adding additional categories like Health, Law, Environment, Lifestyle, Education, etc.

☛ The best time to do a PEST analysis is probably towards the end of your needs analysis but *before* you make your SWOT summary.

SWOT ANALYSIS

During the needs analysis NAs collect a wide range of data in order to determine their current situation in terms of inclusion. A good way to summarise this information is to make a SWOT Analysis.

SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats. Strengths and weaknesses are internal factors (relating to the situation inside the NA). Opportunities and threats are external factors (relating to the situation outside the NA).

STEP 1 – Review the outcomes of your information-gathering in the needs analysis.

STEP 2 – Hang four flipcharts on the wall. Give each flipchart one category – Strengths, Weaknesses, Opportunities and Threats. Give the participants a set of blank cards or Post-Its. Ask them to identify as many points as they can for each category. Write out one point per card and stick the card on the appropriate flipchart.

STEP 3 – Group similar cards together. Take away any duplicate cards. Reformulate any cards which are not clear.

STEP 4 – Group the four flipcharts with their cards together according to the diagram below.

Strengths	Weaknesses
Opportunities	Threats
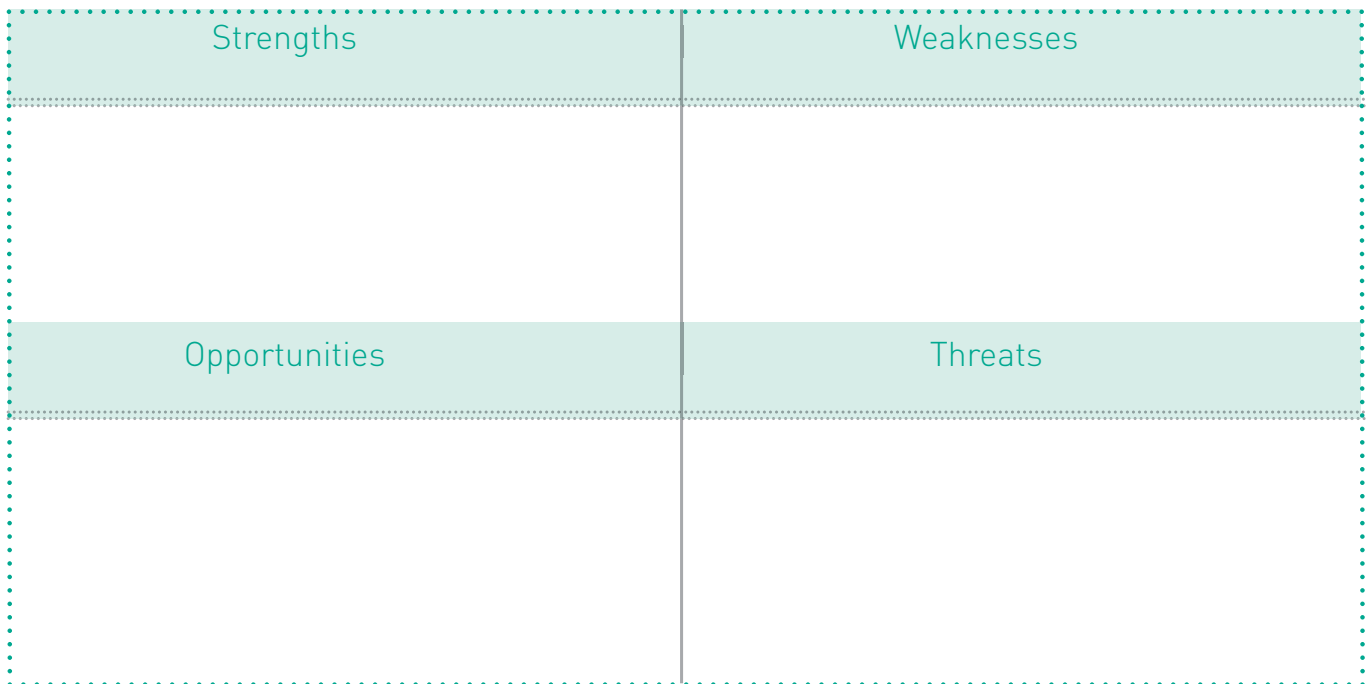
In discussion, answer the following questions:
- What can the NA do to maximise our strengths?
- What must the NA build or develop to overcome our weaknesses?
- What does the NA need to do to capitalise on the opportunities?
- What can the NA do to minimise or neutralise threats?

TOOLS FOR the Planning Phase

SWOT INTERPLAY

The first step of making a strategic plan is identifying potential action areas. Your SWOT Analysis (see above) is a good way to summarise your position but it cannot tell you directly what action your NA should or should not take. By correlating (matching) the strengths and weaknesses with the opportunities and threats, you can identify a variety of potential action areas.

STEP 1 - Take the points listed in your original SWOT summary and sketch out a new expanded table. List the strengths and weaknesses on the left side of the table. Fill in the opportunities and threats at the top of the table (see the diagram below). Look at the interrelationship of the strengths and weaknesses with the opportunities and threats to see where you can (or where you need to) take action.

	Opportunities	Threats
	•	•
	•	•
		•
	•	•
	•	•
	•	
Strengths • • • • •	Where strengths meet opportunities, you need to INVEST	Where strengths meet threats, you need to DEFEND
Weaknesses • • • • •	Where weaknesses meet opportunities, you need to DECIDE	Where weaknesses meet threats, you need DAMAGE CONTROL

(Source: Adapted from Kevin P. Kearns: "From Comparative Advantage to Damage Control: Clarifying Strategic Issues Using SWOT Analysis," Nonprofit Management and Leadership, Vol. 3. No. 1, Fall 1992.

STEP 2 - Go through the list of points on the left of the table one by one (the list of strengths and weaknesses) and consider each one in the context of the separate opportunities and threats at the top of the table.

- Where your strengths meet opportunities, this is the area where the NA is strongest. This is where you should **invest**.
- Where your strengths meet threats, the NA must consider how to best use its resources to protect itself and its activities. This is where you should **defend**.
- Where your weaknesses meet opportunities, the NA risks missing out on valuable chances in inclusion. Here you should **decide** (e.g. will you invest further, pull back, or find a way to co-operate with others?)
- Where your weaknesses meet threats, this is the area where the NA is most fragile. This is where you should **control the damage**.

As you go through the exercise you may notice that several points link together to lead you to your priorities (e.g. one strength may be linked to two or three opportunities at a time). At the same time, it may not always be possible to make logical links between all the points on your list. If certain points seem to have no relation to one another, that's fine. Focus your energy on those points that do.

Below are some fictitious examples which demonstrate how strengths/weaknesses can be combined with opportunities/threats in practice:

✸ Example 1
On one side the NA has a long history in offering high-quality activities (strength). On the other side a new international network of organisations working with fewer-opportunity young people has expressed interest in the NA's activities (opportunity)… The NA should **invest** in this new partnership.

✸ Example 2
On one side the NA offers young people a wide variety of projects where they can go abroad as EVS Short-Term volunteers (strength). On the other side a competing organisation offers similar short-term voluntary activities abroad and can find the young person a placement in less than half the time that the NA can (threat)… The NA should **mobilize** to investigate ways they can improve their internal selection and placement procedures.

> ✳ Example 3
>
> On one side a focus group of fewer-opportunity young people aged 13 -18 found the NA's promotional brochures and booklets unappealing and ineffective (weakness). One the other side these same young people are avid users of new technology like the Internet, mobile phones, i-pods, Blackberries, etc. (opportunity)… The NA should **decide** whether to reduce their use of printed materials and to increase advertising via new technology.
>
> ✳ Example 4
>
> On one side the number of early school leavers participating in the NA's activities has been steadily dropping over the last 5 years (weakness). On the other side national-level funding for early school leavers has been diverted towards formal training courses and may no longer be used for non-formal activities (threat)… The NA needs to **control the damage** by assessing the feasibility of either increasing the participation of this profile of young person or else by selecting a new profile as a target group.

☛ A **SWOT correlation** is a good place to start but don't rely only on this one method to define your potential action areas. There may be other outcomes from your needs analysis which don't appear in your **SWOT summary** but which may still require action. Include these on your list as well before starting to prioritise

PAIRED COMPARISON ANALYSIS

There is so much to be done in the field of inclusion that it is fairly easy to make a list of all the potential action areas that your NA *could* spend time on. It is more difficult to know which of these actions require immediate attention and which ones should take priority over the others.

One effective way to determine priorities is to pair different potential actions together in order to compare them and determine which of the two has higher importance.

STEP 1 - Review your list of potential action areas. Split your list into two parts:

- potential actions which are **internal** (any action related to improving the NA's productivity or efficiency in inclusion like hiring new staff, offering internal training, improving systems and procedures, investing in new technology, etc.) and
- potential actions which are **external** (any action related to improving the impact of the NA's inclusion work like contacting new target groups, developing new activities, partnering with other stakeholders, etc.)

STEP 2 - Comparing the different potential actions to determine which ones take priority over the others (see the diagram below). Be sure to compare only internal with internal and external with external.

- Draw up a grid with each action area in both a row and a column header. Assign a letter to each option (A, B, C, etc.)
- Block out cells on the table where you're going to compare an option with itself.
- Block out the cells where you will duplicate a comparison
- In the remaining cells, compare the option in the row with the option in the column. Decide which of the two options is more important. Write down the letter of the more important option in the cell and score the difference in importance from 1(equal importance) to 3(much more important).
- Tabulate the results by adding up the total of all the values for each of the options.

	Potential action #1(A)	Potential action #2(B)	Potential action #3 (C)	Potential action #4 (D)
Potential action #1(A)				
Potential action #2(B)				
Potential action #3(C)				
Potential action #4 (D)				

(Source: Adapted from Erica Olsen: "Strategic Planning for Dummies", 2007.)

When drawing up your grid, be sure you include only internal actions on one grid and external actions on another otherwise you will end up comparing apples with oranges. You can list any number of potential action areas in your grid, but for the sake of simplicity try to limit yourself to a maximum of five.

On the next page is a fictitious example which demonstrates how to carry out a Paired Comparison Analysis in practice:

> ✳ **Example**
> The National Agency of "No-country" has a high level of experience in inclusion. The NA has a small but strong base of experienced project promoters (strengths). The project promoters are interested in launching more inclusion-themed projects. As well, one of the "veteran" organisations has recently asked the NA to help them develop a new quality control system. At the same time, a brand new target group has expressed interest in getting involved in YIA (opportunities). However, the NA is a small office with a small annual budget. The Inclusion Officer can allocate only 5 hours per week to inclusion issues (weakness). The NA's difficulties have recently been compounded by the creation of a large new national-level NGO. This NGO is in direct competition with the NA and threatens to draw away participants and projects because the NA is too small to keep up with the demand (threat).

With limited resources, the NA can only focus on one action area at a time. The potential action areas identified so far include:
- Building up partnership with the new target group
- Developing a new quality control system with project partners
- Creating a multiplier network of experienced project promoters to deal with the growing demand for inclusion activities
- Exploring the possibilities for co-operation with the competing NGO

	Building up partnership with new target group (A)	Develop quality control system for projects (B)	Create a multiplier network to deal with demand (C)	Explore co-operation with competing NGO (D)
Building up new target group (A) partnership with		A,3	C,2	A, 2
Develop quality control system for projects (B)			B, 1	B, 2
Create a multiplier network to deal with demand (C)				C, 2
Explore co-operation with competing NGO (D)				

In order to determine priorities, the strategy team compares each potential action area one by one against the others. In each box, they write down the letter of the more important of the two options and then score the level of importance. For instance, when comparing building up a partnership with the new target group with developing a quality control system inclusion projects, the team chooses A over B. They decide that building up the new partnership is three times as important as developing quality controls. This gives a score of A,3 . The team then goes through the same process for each comparison, adds up the A, B, C and D values and converts them into a percentage as follows:

<div align="center">

A = 5 (42%)

B = 3 (25 %)

C = 4 (33%)

D = 0 (0%)

</div>

Building up partnership with the new target group is chosen as the most important action area (A) followed by creating a multiplier network (C). With lower scores of only 25% and 0% respectively, options B and D are not high-level priorities for the NA at this time.

By the end of this exercise you should have two new lists – one shows the NA's **internal** priorities and the other the NA's **external** priorities. These lists are your reference point. If ever you don't know where you should best be spending your time, investing your resources or how to respond to new circumstances these two lists should provide you with the answers.

SETTING SMART OBJECTIVES

Step 3of the Planning process involves defining objectives and desired results for your strategy. To be as effective as possible, your objectives need to be SMART:

<div align="center">

S = Specific

M = Measurable

A = Agreed upon (by everyone involved)

R = Realistic

T = Timebound

</div>

The SMARTer your objectives, the easier it is to know what steps are needed for implementation. SMART objectives are simpler to monitor and quicker to evaluate.

To understand the importance of SMART objectives, consider the following example:

> *To increase participation in the Youth in Action programme.*

This formulation is very vague; it more closely resembles a global aim than an objective. You may want to increase participation but by whom, by when and to what extent?

> *To increase the participation of young people from fewer-opportunity backgrounds in Action 1.1 and Action 1. 2 of the Youth in Action programme.*

This formulation is better because the objective is more *specific*. However it is still not *measurable* nor *timebound*. Without these details it is not possible to say whether or not the objective is *realistic*.

> *To increase the participation of young people from fewer-opportunity backgrounds in Action 1.1 and Action 1.2 of the Youth in Action programme by 50% within 3 years.*

This formulation is much clearer. Here the objective is *specific* (it states who and what), it is *measurable* (how much) and it is *timebound* (by when). On this basis the strategy team will be able to decide whether or not it is *realistic* (is an increase of 50% achievable within the timeframe?). If so, the objective can then be *agreed* upon by all members of the team.

☛ When you identify objectives for your strategic plan, make sure each one is **SMART**.

EVALUATING YOUR STRATEGIC PLAN AND THE PLANNING PROCESS

Once you have completed the three steps in the Planning phase and have put together your strategic plan it is a good idea to stop and review the results before you move on to the Implementation phase.

Consider your list of priorities, your defined objectives and desired results and answer the following questions:

The Strategic Plan	Yes	No
• Does the strategic plan provide guidance on both short-term and long-term priorities for inclusion?		
• Does the strategic plan help the NA to allocate its resources?		
• Is the strategic plan understandable by people who have not participated in the development of the plan?		
• Does the strategic plan respond to the NA's best understanding of its internal and external environments?		
• Was the strategic plan developed on the basis of a consensus and commitment-building process?		
• Has the strategic plan been formally adopted by the head of the Agency and/or the Board of Directors?		
Comments and suggestions for future strategic plans:		

The Planning Process	Yes	No
Did the Planning process meet the following criteria? • The process itself was consensus building		
• The process offered a way to surface the needs and interests of all stakeholders		
• The process allowed sufficient time to reach agreement on what is best for the long-term and short-term interests of the NA in the field of inclusion		
• The process allowed sufficient time to weigh and assess different options.		
• The process allowed each stakeholder who needed to be involved to play an active role in the process		
• The process provided participants with tools to successfully go through the different steps in the planning process.		
Comments and suggestions for future planning processes:		

Adapted from Worksheet 10 – Support Center for Nonprofit Management (1997).

TOOLS FOR the Implementation Phase

OUTLINE OF AN ACTION PLAN

Your strategy is not 100% complete until you have clearly described how you intend to achieve the objectives and results listed in your strategic plan. The specific steps you and your colleagues in the NA are going to take in the Implementation phase can most effectively be presented in an action plan.

Action Plan
Objective: *(name one of the SMART objectives you defined in Step 3 of the Planning phase)*

Step #	Task	Person responsible	Start date	End date	Progress	Cost
1	*What* will be done?	*Who* will do it?	*When?*	*By when?*	*How close* are you to completion?	Money **_or_** time
2						
3						
4						

(Source: Adapted from Erica Olsen: "Strategic Planning for Dummies", 2007.)

- *Objective* – clearly indicate which objective you are making an action plan for. You should have a separate action plan for each of your objectives.
- *Task* – name the specific steps that will be taken towards achieving the objective. Tasks should be written down in chronological order (start with those tasks that need to happen first).
- *Person responsible* – assign the task to a specific member of staff. Be sure both the director and the staff person named approve the assignment.
- *Start date / End date* – indicate when the task should be started and by when it should be completed.
- *Progress* – keep track of the development of individual tasks as time goes by. How close is the task to completion? (This can be expressed in terms of percentage: 25%, 50%, 80%, etc.)
- *Cost* – indicate any costs linked to the tasks here. Some tasks have no direct financial costs but all tasks cost the NA time. Make an estimate of the staff time needed to complete each task here (indicate the number of hours or total amount in Euros).

MONITORING THE STRATEGIC PLAN

Once you have started to implement your strategic plan, it is vital to regularly monitor the progress being made. Monitoring can help the NA to:

- Note accomplishments and disappointments
- Assess changes in the environment since the last planning meeting, and
- Make changes in core strategies, long- and short-term priorities (if necessary)

Date: _____

1. List the overall accomplishments to date (objectives/concrete tasks). Indicate the status of implementation of other long- and short-term objectives / priorities:
2. Indicate any reasons for non-accomplishments of these objectives/priorities:
3. Indicate actions to be taken by individual staff members or by the NA as a whole to prevent problems happening again:
4. Indicate any significant changes in the NA's environment since the last planning meeting:

Previous strengths	Current strengths
•	•
•	•
•	•
Previous weaknesses	Current weaknesses
•	•
•	•
•	•
Previous opportunities	Current opportunities
•	•
•	•
•	•
Previous threats	Current threats
•	•
•	•
•	•

5. Indicate which changes need to be made in:

Long-Term Priorities (Program and Management/ Operationsand Objectives)	Short-Term Priorities (Program and Management/ Operations Goals and Objectives)

Adapted from Worksheet 11 – Support Center for Nonprofit Management, (1997).

TOOLS FOR *the Evaluation Phase*

OVERVIEW OF RESULTS ACHIEVED

An inclusion strategy will try to accomplish a variety of objectives over several years. One aspect of the Evaluation phase is to determine what concrete **results** have been achieved in this time. Results in this context refer do not refer to the outcomes of individual projects or activities but rather the extent to which you have achieved your strategic objectives.

Thanks to regular monitoring of your strategic plan, you will likely have a good idea of which objectives have or have not been achieved long before the time period runs out. Nevertheless, it can be useful for NAs to compile a global overview which shows the level of success achieved at a glance.

✷ Example

Overview of Results					
Priority	Objective	Desired Results	Progress	Reason for non-accomplishment (if applicable)	Next Steps
1	• • •	• • •			
2	• • •	• • •			
3	• • •	• • •			
4	• • •	• • •			

- *Objective / Desired Result* – indicate the objective and desired results as determined in Step 3of the Planning phase (keep the same formulation as originally used in the strategic plan).
- *Progress* – indicate the extent to which the objective and desired results have been achieved (express in terms of percentages – 50% complete, 75% complete, 100% complete).
- *Reason for non-accomplishment* – for any objectives/results not 100% achieved indicate the reasons why as well as any internal or external factors which may have played a role.
- *Next Steps* – outline the specific action(s) which will now be taken.

FINAL REVIEW OF THE STRATEGIC PROCESS

Your inclusion strategy will be in place for a period of several years. In that time much work will be done and many discussions carried out. An inclusion strategy never really comes to an end so it can be difficult to know the best time for making a final review of the strategic process.

In the Planning phase you established a timeline for your strategic plan (e.g. 3 -year objectives for the NA to achieve.) The end of this period is generally a good moment to look back and review the separate phases which contributed to the development of your inclusion strategy.

(N.B. – the following questions should be used as a basis – feel free to expand the lists below in order to evaluate other areas of the strategic process.)

1) The Analysis Phase:	Yes	No
• Did the strategy team carry out a needs analysis?		
• Was the needs analysis effective and efficient?		
• Did the needs analysis provide enough information about the NA's situation in terms of inclusion (i.e. strengths and weaknesses, opportunities and threats)?		
• Did the needs analysis provide enough information about the needs of young people with fewer opportunities (in general or in terms of specific target groups)?		
• Did the needs analysis provide enough information on the needs and expectations of project promoters?		
• Did the needs analysis provide enough information about the NA's competitors in the field of inclusion?		
• Did the needs analysis provide enough background information to enable the strategy team to make decisions?		
Comments and suggestions for the future:		

2) The Planning Phase:	Yes	No
• Was sufficient time allocated for the development of the strategic plan?		
• Were key stakeholders able to make an active contribution to the development of the NA's strategic plan?		
• Were young people able to make an active contribution to the development of the NA's strategic plan?		
• Did the strategic plan identify appropriate priorities for the NA's inclusion work?		
• Did the strategic plan identify realistic objectives and desired results?		
• Did the timeframe defined in the strategic plan allow enough time to achieve the desired results but still challenge the members of the team?		
• Was the strategic plan communicated effectively to all members of the NA staff?		
• Was the strategic plan communicated effectively to all key stakeholders?		
• Was the strategic plan approved by the head of the Agency and/or Board of Directors?		
Comments and suggestions for the future:		

3) The Implementation Phase:	Yes	No
• Did the strategy team make regular use of action plans?		
• Did the action plans serve to "operationalize" the strategic plan?		
• Did the action plans allow room for flexibility, creativity and self-management by staff members?		
• Was the strategic plan monitored and reviewed regularly?		
• Were all key stakeholders actively involved in the implementation of the strategic plan?		
• Was the status of the strategic plan regularly communicated to all members of staff?		
• Were team members recognised and rewarded for reaching key targets?		
Comments and suggestions for the future:		

4) The Evaluation Phase:	Yes	No
• Have the results of the inclusion strategy been measured and summarised?		
• Has the impact of the inclusion strategy been measured and summarised?		
• Have the outcomes of the evaluation been thoroughly documented?		
• Has a list of recommendations for the future been compiled (complete with timetable for follow-up)?		
• Have the outcomes and recommendations of the evaluation been shared with key external stakeholders?		
• Does the NA have a plan for wider dissemination of the outcomes and recommendations (beyond key stakeholders)?		
• Has the NA begun the development of a new strategic plan (new priorities, objectives and desired results)?		
Comments and suggestions for the future:		

General conclusions:

1)

2)

3)

Recommendations

1)

2)

3)

REFERENCES, RESOURCES AND FURTHER READING

FURTHER READING

Some more SALTO "Inclusion for All" publications:

- **Going International - Inclusion for All (2004)** – a booklet with practical inclusion methods and advice for preparing, implementing and following-up on international projects with fewer opportunities
- **Use your Hands to Move Ahead (2004)** – using practical tasks to increase participation by young people with fewer opportunities in short term European Voluntary Service projects
- **Fit for Life (2005)** – using sports as an educational tool for the inclusion of young people with fewer opportunities in youth work and youth
- **No Barriers, No Borders (2006)** – a practical booklet on setting up international mixed ability youth projects (including persons with and without a disability)
- **Over the Rainbow (2006)** – a practical booklet about setting up international projects with young lesbians, gays, bisexuals and young people questioning their sexual orientation
- **Inclusion & Diversity (2006)** – how to make your youth work and youth projects more inclusive and reach more diverse target groups (co-operation SALTO Inclusion & SALTO Cultural Diversity Resource Centres)
- **Rural youth work (2007)** - A practical booklet for youth workers about setting up international projects in rural and geographically isolated areas.
- **Making the waves (2007)** - Creating more impact with your youth projects
- **Coaching Guide (2007)** – a guide that explores the concepts of Coaching, including practical tools, methods, advice and information (SALTO Participation)
- ...

☛ Find them all at www.SALTO-YOUTH.net/Inclusion/

Looking for youth work and training methods on Inclusion and other topics?
Browse through the SALTO Toolbox for Training at www.SALTO-YOUTH.net/Toolbox/

- T-Kit Series: *The training kits are thematic publications written by experienced youth trainers. They are easy-to-use handbooks for use in training and study sessions,* **published by the Partnership between the Council of Europe and the European Commission on European Youth Worker Training.**

- Social Inclusion
- Project Management
- Organisational Management
- Methodology in Intercultural Language Learning
- Intercultural Learning
- International Voluntary Service
- Under Construction… Citizenship, Youth and Europe
- Training Essentials
- Funding and Financial Management
- Educational Evaluation in Youth Work
- Evaluation
- Euromed Co-operation

☛ Downloadable from www.training-youth.net or www.salto-youth.net/Toolbox/

ONLINE RESOURCES
More inclusion links and resources at www.salto-youth.net/Inclusion/
- **Social Inclusion Resources** - The SALTO Inclusion Resource Centre develops, collects and disseminates resources which can help youth workers and youth leaders to implement inclusion projects http://www.salto-youth.net/inclusion/
- **SALTO Newsletter on Inclusion** www.salto-youth.net/InclusionNewsletter/

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  A distance learning package written and designed by staff at the Home Office Crime Reduction Centre. While the package looks specifically at the context of evaluating crime reduction projects, it presents evaluation as a vital part of the project planning and management process. The package is relevant to anyone likely to be involved in evaluating projects or initiatives, whatever their level of experience.

- **National Association of Health Underwriters.** (info@nahu.org). ®*Worksheet 6_. Retrieved November 1, 2007 from* http://www.nahu.org/members/SS_Worksheet_01_11.htm
  A series of 11 worksheets developed by the Support Center for Nonprofit Management (1997) to guide organisations through the strategic planning process (needs analysis, planning, implementation and evaluation).

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  A series of toolkits produced for CIVICUS World Alliance for Citizen Participation to enable organisations to build their capacity and achieve their goals. These and other toolkits in the series can be found at www.civicus.org.
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  http://www.civicus.org/new/media/Strategic%20Planning.pdf
  Overview of Planning Toolkit:
  http://www.civicus.org/new/media/Overview%20of%20Planning.pdf
  Action Planning Toolkit:http://www.civicus.org/new/media/Action%20Planning.pdf
  Monitoring & Evaluation Toolkit:
  http://www.civicus.org/new/media/Monitoring%20and%20Evaluation.pdf

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EDITORIAL INFO

The launch of the Youth in Action programme ushered in a period of change for **National Agencies and their work on inclusion**. New roles and new demands have created a need for a more strategic approach.

But what is "strategy"? What is involved in developing **a strategy specifically on inclusion?** How do you know if your NA actually needs an inclusion strategy? These and other questions are addressed in this booklet.

Shaping Inclusion de-mystifies strategy and encourages NAs to take a more strategic approach to inclusion. The booklet presents a step-by-step approach which NAs can use to develop their own national-level inclusion strategies. In this way NAs can maximise the results and impact of their inclusion work.

Shaping Inclusion aims to make strategy development more attractive and accessible. The approach and methods described here are not only relevant to the field of inclusion but can be used by anyone in almost any context.

Based on the SALTO Inclusion Round Table Meeting on Inclusion Strategy (2007).

This booklet is part of the SALTO "Inclusion for All" series.

This booklet is part of the SALTO "Inclusion for All" series. Download them for free at: **www.SALTO-YOUTH.net/Inclusion/**