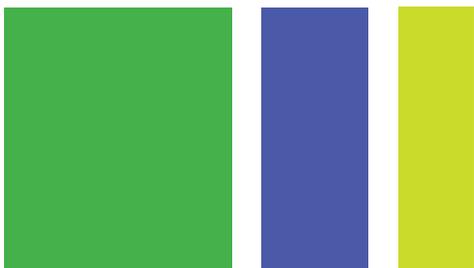


EUROPEAN TOOLKIT FOR
ORGANISATIONAL DEVELOPMENT
OF YOUTH ORGANISATIONS





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#youthkit

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Bucharest, 2017

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1. INTRODUCTION AND CONTEXT

According to recent Eurostat data, for both men and women in Europe, young people aged 18 to 24 are the most likely to be at risk of poverty or social exclusion (30.60% were at risk in 2016). Moreover, this situation has not improved over the years. As the 2015 EU Youth report shows, nearly all Member States took measures in previous years to counteract the growing social exclusion of young people in Europe. In this regard, most states aimed to improve young people's access to quality services through enabling the development of organisations working with and for young people (EU Youth Report, 2015, http://ec.europa.eu/assets/eac/youth/library/reports/youth-report-2015_en.pdf).

Also, the 2014 EC study “Working with young people: the value of youth work in the European Union”, showed the important value of youth work for young people in different aspects of their lives, including the capacity of organisations working with young people to act as forces of inclusion by assisting young people to engage, volunteer and drive positive social change in communities. As a conclusion, the same study underlines the need for a reference and guidance tool on quality for youth organisations. As well, a series of identified weaknesses and threats for youth work were presented. Among others, the study mentions that there are limited evaluations of youth work in most EU countries, there are growing requirements for organisations to provide evidence of their effectiveness as well as there is a need for specialized fund-raising and management skills (Working with young people: the value of youth work in the European Union, 2014, http://ec.europa.eu/assets/eac/youth/library/study/youth-work-report_en.pdf).

Having said this, the main idea addressed by this toolkit is the need to develop the youth sector in Europe in order to provide efficient and quality service to young people in different risk situations.

Usually, the work and worth of organisations working with young people is determined by the effectiveness of their services and how successfully they achieve their mission. Accordingly, since improving the quality of their services is a top priority, they largely ignore building the capacity of the organisations. Yet, for most organisations, the ability to deliver effective services depends on sound management practices. For this purpose we advance this toolkit for organisational development of youth organisations in Europe.

This toolkit builds on existing data and advances new approaches for a better implementation of organisational development tools, so that youth organisations in Europe can enhance their quality approaches and become more professional in their daily work serving young people with fewer opportunities.

2. EUROPEAN REPORT

on the quality of the work inside organisations working with young people with fewer opportunities

The report aimed to collect and assess data about current practices for organisational development of organisations working with young people with fewer opportunities in Europe and to propose several recommendations in the field. Moreover, the collected information and practices represent the base for the present European toolkit and the instruments proposed. The main instrument used, online survey, focused on 6 dimensions of organisational development: governance, financial management, knowledge management, monitoring and evaluation, organisational structure and external communication. Each of these areas was specifically addressed with a combination of open and multiple choice questions. The survey was addressed to all those who are involved in a youth organisation and have a good knowledge of the organisation's work. Also, another method used for the research - semi-structured interviews - was meant to explore in-depth one or two of the 6 dimensions, focusing on pinpointing particular good practices that might become inspiring for others and could be used in building the European toolkit.

The conclusions based on the survey that was completed by 92 youth organisations that work with young people with fewer opportunities coming from 24 EU countries are detailed below. While we can say that in the majority of cases the results are in line with our expectations, there are some findings that we believe are worth mentioning.

1. Even though the survey has been completed mostly by executive directors/managers and board members (63 %), the vast majority of respondents (almost 86 %) consider themselves as youth workers. While this was expected, as most of the organisations have 1–10 employees where the executive role is probably still combined with field work, it was more interesting to notice that the answers why they consider to be or not to be a youth worker were basically the same. While some consider themselves as youth workers even if they are not working directly with youth, others took this as a factor against defining themselves as youth workers. To make sure we have reliable data on youth work around EU, more effort should be put into common understanding of key concepts in the field of youth e.g. what is a youth organisation and what is youth work. This would enable to compare different national reports and achievements as well as pure statistical information around Europe.

2. When we looked at the areas the organisations are working on, we were surprised to see that only 41 % of organisations are active in the fields of employment and entrepreneurship. Keeping in mind that these are one of the key priorities of most European and national (youth) policies it is surprising that youth organisations have not yet incorporated it in their work. Adding a new area in the scope of the work of the organisation is for sure not easy; it takes a lot of effort and required a big investment. When encouraging youth organisations to become more active in this field (or any new field for what matters) we should consider the time needed for organisations to adapt.
3. While it's common understanding that young people are less interested in being members of the organisations and prefer to respond only to ad hoc, instant actions, our respondents report quite a different story, as 94 % of them says that the membership has increased in the last 3 years or stayed the same. While we don't have enough information on their usual trends, so it might be true that the membership is growing slower than before, it's still encouraging to see that the membership is not in decline.
4. The importance of the highest governance bodies of the organisations is acknowledged, as they have many roles and tasks to fill. Nevertheless it's quite alarming that only half of them rated their work as very successful, even more so when we take into consideration that the majority of answers came from executive directors and board members. Offering more support for them could have a big impact on organisational development of each organisation. We should consider designing special support measures and capacity building activities for the members of the highest bodies of the organisation so that they could be more successful in their work.
5. Looking at transparency of youth organisations we've notice that more organisations have financial annual reports than programmatic ones. This could be due to the financial regulations they must respect as, in some countries, the financial reports are obligatory. The more worrying information is that, in general, only around 50% of the organisations published their financial reports and made them available to public. Seems like they are still not willing to share financial information with the public or have not yet recognized the potential benefits of active transparency. As they are usually not classical charities that would search for donations from individuals it's still important to be transparent also to other kinds of donors. As well, transparency might help them to attract more donations and sponsorships from companies. The good news is that their incomes are mostly on the rise, as 86% of them report that their yearly budgets have increased or stayed more or less the same in the past 3 years.

6. A very positive aspect of youth organisations is that they obviously present a great opportunity for people to gain new skills – the vast majority of the respondents has benefited from the trainings and educational opportunities in the last year, almost 90%. But there is a danger that this knowledge is not fully used by the organisations, as less than half of them have some mechanism to transfer the knowledge gained to others in the organisation. Therefore, if a person leaves the organisation the knowledge also disappears. As the organisations are investing significant resources into building their capacities (50% are investing from 5-15% of their yearly budgets) more should be done to make sure the organisation really profits from it and not just individuals.
7. Monitoring and evaluation (M&E) seems to be understood more as an obligation than an opportunity for organisation to grow, as over 50% do it only because they are required by the project and only around 20% consider it an integral part of their work. Connected to this, only a handful of them follow the progress of their beneficiaries on a longer term and most of their M&E takes place during the project activities. But project/donor request can be a good push for organisations to dedicate some time to M&E and to start working on it. So, if the project based M&E would switch from counting outputs and numbers of participants to outcomes, results and long-term impact, this would force the organisations to re-think their way of working as well.
8. There is a lot more to be done for real involvement of young people with fewer opportunities, even though they are recognized as an important stakeholder by most organisations. According to the survey, only 20% of respondents have their beneficiaries represented in the board or present in different sessions. Around the same percentage is present on staff meetings. Most of the time their involvement is limited to educational activities and public events. Only 56% of organisations include their beneficiaries in their consultations and even less (just 33%) include them in strategic meetings.
9. One more important thing that it's worth pointing out is their communication activities. As they claim to include communication aspects in their strategies (58%) and to have a special person dedicated for communication (50%) it's strange that they don't communicate more often with the media and that their communication is mostly focused to general public. No concrete data was collected but it would be interesting to find out more about their communication plans and how effective they are. It just might happen that here too, they are more focused on fulfilling project's obligations rather than supporting organisation's goals.

The full version of the report is available here:
<http://www.odyotoolkit.eu/european-report/>

3. ABOUT THE EUROPEAN TOOLKIT for organisational development of youth organisations

As a direct result of the European report on the quality of the work inside organisations working with young people with fewer opportunities, we propose this European toolkit on organisational development. The content of the toolkit is based on the conclusions and recommendations of the report but also on the extensive expertise on consultancy and capacity building for the nongovernmental sector of the partners involved in this Erasmus+ co-financed project.

The main purpose of the toolkit is to offer youth organisations in Europe the possibility to make an assessment of their current practices related to organisational development and to implement changes based on the assessment, wherever changes are needed/ necessary.

In short, the toolkit proposes the following structure:

1. A chapter dedicated to the self-assessment matrix for organisational development, which members/ staff/ volunteers can apply in order to have an overview of the current practices in the organisation. The matrix is divided in 10 indicators - Governance, Financial aspects, Knowledge management, Monitoring & evaluation, Organisational structure, Leadership, Human resource management, Beneficiary involvement (young people with fewer opportunities), Advocacy and External communication.
2. A bigger chapter that proposes instruments for organisational development to be applied based on the findings of the self-assessment matrix. Each of the indicators from the matrix has a specific chapter inside the toolkit, with information and instruments related to each domain. The information in each chapter represents a collection of texts from different existing sources related to organisational development. The instruments/ exercises are especially created for this publication. The toolkit includes also instruments/ exercises on how to do strategic planning, mostly related to the governance indicator, but a practice that transcends all organisational aspects.

The toolkit also has an online version, incorporated onto a web platform (www.odyotoolkit.eu) in which all content is presented in an interactive way, with downloadable options for the instruments/ exercises proposed. These instruments are transferable and adaptable/ flexible and can be easily applied by any organisation in Europe.

4. WHAT IS ORGANISATIONAL DEVELOPMENT?

A well-known definition of organisational development is the one provided by Richard Beckhard, in the book *Organisation Development: Strategies and Models*. There he stated that organisational development “is an effort that is (1) planned, (2) organisation-wide, and (3) managed from the top, to (4) increase organisation effectiveness and health through (5) planned interventions in the organisation’s processes, using behavioural-science knowledge.” (Beckhard, 1969).

In the same year, Warren Bennis argued that “organisation development is a response to change, a complex educational strategy intended to change beliefs, attitudes, values, and structures of organisations so that they can better adapt to new technologies, markets, and challenges, and the dizzying rate of change itself”. (Bennis, 1969).

However, these theories were much influenced by the post-industrial economy at that time and could be applied more for companies (for profit) rather than NGOs (not for profit). Hence, a lot of information related to different aspects of organisational development has this “business flavour” and we must adapt it to the NGO sector.

Even so, NGOs can find similarities with parts of the above-mentioned definitions: NGOs undertake actions to increase their effectiveness and they plan processes in response to changes. In this toolkit we will approach both dimensions, looking at organisational development from a more practical perspective, folded into 3 steps:

1. Assessment – in this phase organisations identify possible problems/ issues that may interfere with their effectiveness and assess the causes for it.
2. Implementation – after the assessment, organisations plan and undertake actions in order to increase their capacity, applying specific instruments and constantly monitoring the process.
3. Evaluation - assess the intervention by tracking the organisation’s progress in implementing the plan and foresee actions for the future in order to better address changes.

5. GLOSSARY OF TERMS

Advocacy - “any attempt to influence the decisions of an institutional elite on behalf of a collective interest.” (Jenkins, 1987)

Beneficiaries - the people who are in the centre of the work done by your organisation. (e.g. young people)

Board - a group of people that are in charge of governing an NGO, making sure the organisation is following its vision and mission.

Cash flow projection - the expected amounts of money that come into the organisation (income) along with what will go out as expenses.

Donor – a person, private organisation or government/ public institution who is giving resources (financial, human etc.) to an organisation.

Evaluation - assessing the fulfilment of what a project aimed for/ the work of an organisation. Its main purpose is to help the organisation reflect and learn on what it is doing, observing how far it has gone and identifying required changes.

Fundraising – the process to seek and secure resources for the organisation and its activities. Usually it is viewed as financial resources, but it can also include e.g. in-kind contributions.

Governance - the processes and activities involved in making sure an organisation is effectively and properly run.

Knowledge management - “the process by which an organisation creates, captures, acquires, and uses knowledge to support and improve the performance of the organisation.” (Kinney, 1998)

Management – overview on the activities of the organisation or specific projects/ programs, ensuring that everything runs properly and adequate policies and procedures are followed.

Monitoring - collecting and recording information about a project/ program/ the work of an organisation, in order to have a constant overview of activities, to provide regular feedback on how things are going and help the organisation make decisions.

Organisational sustainability – the ability of an organisation to undertake actions and secure resources in order to run for a long period of time, fulfilling its mission.

Vision and Mission - the vision states the manner in which the organisation would like to see the world in which it operates. The mission defines the fundamental purpose of an organisation - why does it exist, for whom and what it does to reach the vision.

Risk Management – the process of identifying risks (probable events that may occur and their consequences), deciding how to deal with them and planning actions to prevent or reduce their effect.

Public policy – “a purposive and consistent course of action produced as a response to a perceived problem of a constituency, formulated by a specific political process, and adopted, implemented, and enforced by a public agency.” (Hayes, 2001)

Stakeholder - any group or person within or outside an organisation that has a direct or indirect interest (stake) in relation to the organisation.

Strategic planning - a process in which an organisation puts into practice more coherently its mission, taking into account its local context, its strengths and weaknesses, and the threats and opportunities facing it.

Strategy - a plan of action designed to reach the long-term goals/ aims of the organisation. Strategy usually involves setting goals/aims, determining actions to achieve them and mobilizing resources to implement the actions.

Transparency – operating in such a manner that it is easy for stakeholders and other parties to get easily informed on the actions of the organisation.

6. SELF-ASSESSMENT MATRIX

One of the most important instruments of the toolkit is the self-assessment matrix. This is a tool for organisations that can help measure themselves against a proposed standard, provided by this toolkit. The matrix has been developed to be useful in evidencing change and it is designed for organisations that want to get more professional and solve management issues. Moreover, the matrix is designed to help organisations to self-assess their organisational development needs, and identify the areas they most need to prioritise. Thus, we would invite everyone to see the matrix as an aid to assist in identifying where you could use organisational development in order to achieve a higher standard of performance that is ultimately translated into better serving your beneficiaries.

Applying the matrix is quite simple – you just need to go through all of the 10 indicators proposed. For all five questions in each indicator, just find the most appropriate level in which you can frame the current situation of your organisation. If the descriptions are somewhat similar or equal, please select the most appropriate that feels relevant. For a more structured process we invite organisations to fill in the self-assessment matrix online, via the website www.odyotoolkit.eu, where there is a chart that will better help you visualize the outcomes of this process. Please have in mind the following:

1. Be honest – the process of development needs to be as honest as possible. Put yourself in the position to critically answer the questions, in the most realistic way possible. Remember you are not doing it to impress but to express and project future possibilities of the organisation.
2. Use the matrix as a tool for learning – this instrument is a tool to frame the current situation of your organisation. For an organisation to evolve it is important that people involved see development issues as a learning process in which there are only win-win situations.
3. Combine the matrix with the instruments and strategic planning – if you just apply the matrix and get the results, you are only half way there. Based on the assessment, we strongly encourage you to solve possible gaps in different areas of your organisational development. And get help from us!
4. Make it participatory – applying the matrix is a collective exercise, involving as many members/ staff/ volunteers, governing body and external stakeholders as possible. We recommend to involve at least one person from different stakeholder groups. The assessment based on the matrix should be done individually but then compared and scored on average from all the participants in the process.
5. We acknowledge the fact that organisational development is time consuming, but in order to get to our vision, we need to dedicate time for our development. So, keep calm and take time!



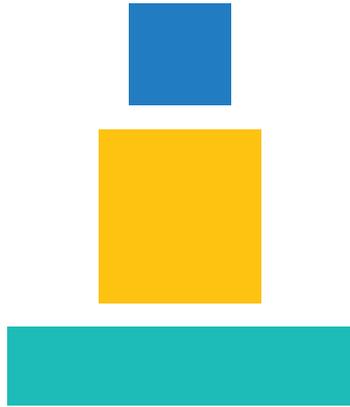
GOVERNANCE

	None	Limited	Some	Clear	Comprehensive
To what extent is the vision and mission of the organisation clear?	No written vision and mission	Written vision and mission, nevertheless the organisation doesn't follow them in practice. The vision and mission are too broad/ they include too many aspects	Written vision and mission, followed in practice. There is a lack of agreement among members about the "raison d'être" of the organisation	Clear expression of the vision and mission that is most of the times referred to in directing actions and setting priorities	Vision and mission are clearly written, reviewed/ evaluated, promoted and followed in all activities
To what extent a strategic plan is implemented in the organisation?	No strategic plan	No written strategic plan, but some general guidelines exist	Written strategic plan, but not fully implemented	Written strategic plan that is implemented but not followed in all cases or evaluated	The organisation has a strategic plan that is fully implemented and regularly reviewed/ evaluated
What is the role of the governance body? (e.g. Board, General Assembly)	The organisation has no governance body	The governance body exists only formally (on paper)	The governance body has limited understanding of its role. Usually it only formally adopts the decision taken by the leaders of the organisation	The governance body has a somewhat clear understanding of its role. Sometimes it is consulted for the strategic direction of the organisation	The governance body has a clear role and responsibilities. It provides overall strategic direction for the organisation and is actively fulfilling its tasks
Is the composition of the governance body based on clear criteria which reflect a diverse background?	No criteria for the composition of the governance body	Some criteria are established. Nevertheless the criteria are not followed for the actual composition of the governance body	Criteria for the governance body are followed. All members of the governance body have almost the same skills and knowledge	Criteria for the governance body are followed. Members have diverse skills and knowledge but mainly come from the same background	Criteria for the governance body are followed and the governance body has diverse skills, knowledge and background needed for the development of the organisation
Does the organisation have policies on ethics/ values?	No policies on ethics/ values	Some guidelines for principles on ethics/ values exist. However, there are no written documents in this regard	Written guidelines on ethics/ values exist. Nevertheless, they are not followed in practice (exist only on paper) and people are not informed about them	Written policies on ethics/ values exist but they are not fully implemented. Only a limited number of members are informed and aware about them	There are written policies on ethics/ values that are guiding the everyday life of the organisation. The members of the organisation are aware of them and are using them as a tool for decision making



FINANCIAL ASPECTS

	None	Limited	Some	Clear	Comprehensive
Is the organisation aware of its legal (national) obligations?	The organisation is not aware of the legal requirements	The organisation is not aware of legal requirements. It has an external or internal accountant	The organisation is aware of basic legal requirements and trusts its accountant	The organisation has a good understanding of general accounting practices and legislation for everyday actions	The organisation has a deep understanding of legal requirements and accounting practices. Faced with new situations, it makes sure actions are in line with the law
Does the organisation have a sound financial management?	Every person is in charge of its own projects/ activities with no coordination and no common practices/ procedures	Each person is in charge of its own projects/ activities. There is some coordination among projects, with no common practices/ procedures	Each person is in charge of its own projects/ activities with regular coordination and some common practices/ procedures in the organisation	The financial management of the organisation is supervised by one person who applies common practices/ procedures. There are no coherent practices/ procedures for monitoring	There is a dedicated person who monitors the incomes and outcomes/ all costs of the organisation, tracks expenditure and cash flow, and makes sure the money is spent efficiently
Does the organisation follow a coherent financial planning?	No financial planning	There is a financial planning only based on the previous year	The financial planning is foreseen coherently for the following year	The financial planning is coherent and foreseen for at least 2 years	The organisation has a coherent financial plan that includes a cash flow projection for more than 2 years
To what extent does the organisation have the capacity to ensure sustainable sources of income?	No capacity for providing sustainable income	Limited capacity for providing sustainable income mostly based on project writing. No person is directly involved in this activity	Some capacity for providing sustainable income. There is at least one person dealing with this issue but most efforts are concentrated towards project writing	Clear capacity to provide sustainable income, more than project based. Nevertheless this is not integrated at a strategic level/ ongoing basis	The organisation has the strategic capacity to provide sustainable income for different projects/ programmes/ activities using various methods (from prom project writing, to individual donors/ sponsorships etc.)
Does the organisation consider the diversification of its funds?	The organisation is depended on only one source of income and is not seeking other	The organisation has different sources of income but one of them prevails significantly (more than 50% of its income comes from that source)	The organisation has 2-5 different sources of income but they all come from the same sphere (for example public call for proposals). 1 or 2 donors still prevail	The organisation has 2-5 different sources of income which shares are equally disbursed	The organisation has over 5 different sources of income and none of them exceeds 20% of the total budget of the organisation. The financial resources are different in their status (public/ private, national/ EU, etc.)



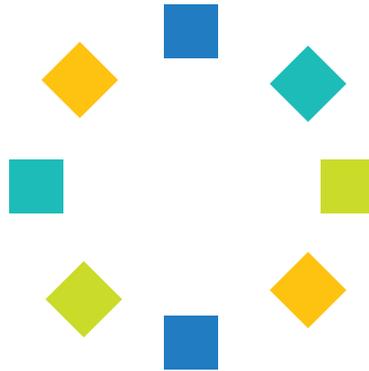
KNOWLEDGE MANAGEMENT

	None	Limited	Some	Clear	Comprehensive
Does the organisation have a sound institutional memory?	No track records of past activities	There is some information on past activities that is not archived. Only one person knows the history.	There is some information available for past projects/ programmes. The information mainly relates to short descriptions of projects implemented	Clear track record of past projects/ programmes, including financial information. There is no information on impact/ results	The organisation keeps track records of past projects/ programmes and their results, including financial information for each of them
Does the organisation have a functional internal database system?	No internal database system(s)	Some information for the organisation is gathered in online or offline formats. There is not a coherent manner in which the information is gathered	An internal database system exists (e.g. server). Nevertheless there is not a coherent manner in which the information is gathered. There are no guidelines on how to use it	An internal database system exists and the information is structured. It is not fully used by members/ staff/ volunteers. There are no guidelines on how to use it	The organisation has a functional internal database system (e.g. of beneficiaries, staff, volunteers, experts, donors etc.) which includes important information. There are guidelines on how to use it
Does the organisation rely on a specific management system?	No system in place	Minimal practice for working with documents, but it is not coherent	Some practices of working with documents mostly online, but not offline (no hard copies are archived)	Clear practice/ procedure in working with documents online and offline, but not all members/ staff/ volunteers are using it	The organisation uses functional management systems (e.g. online project management tools) that define working and storage of documents, used by everyone
Does the organisation use past learning?	The organisation does not collect any information so it can learn from past experiences	The organisation has limited practice of using lessons learned and it is not shared with all members/ staff/ volunteers	There is a practice of using past information, but only for technical issues (e.g. project writing)	Past information and lessons learned are used to plan future activities. Knowledge is not shared with everybody	Past information and lessons learned are used to plan future activities and the knowledge is shared with all members
To what extent the organisation publishes a comprehensive annual report?	The organisation has no annual report	Some articles about the activity of the organisation are published, but not inside an annual report	An annual report is published but not all important information is there	The organisation has 2-5 different sources of income which shares are equally disbursed	The annual report is considered as an important communication tool and is prepared in a coherent manner, taking into account different stakeholders



MONITORING AND EVALUATION

	None	Limited	Some	Clear	Comprehensive
Does the organisation have a practice for monitoring and evaluation?	No monitoring and evaluation in the organisation	Monitoring and evaluation are done only when requested by donors	Some standard activities are being monitored and evaluated but only to the extent of outputs. No other measurements taken into account	Clear practices of monitoring and evaluation undertaken only for specific activities (e.g. trainings, workshops etc.). There are no practices for tracking impact	Monitoring and evaluation is part of the organisational culture, included into everyday action and regularly updated/ reviewed. Monitoring and evaluation includes tracking of impact
To what extent the organisation monitors and evaluates goals and results of its activity?	No monitoring and evaluation in the organisation	Some practices in the organisation for monitoring and evaluation. Nevertheless there are no specific items followed	Some practices in the organisation that mostly monitor and evaluate activities (administrative)	The organisation monitors and evaluates its overall goals, but does not put emphasis on results	The organisation monitors and evaluates its overall goals and results
To what extent the organisation uses indicators for monitoring and evaluation?	No monitoring and evaluation in the organisation	Some practices to collect information for monitoring and evaluation. Nevertheless there are no concrete indicators set	The organisation uses mostly quantitative indicators and evaluates progress compared to previous years	The organisation uses simple qualitative and quantitative indicators and periodically reviews progress	Monitoring and evaluation is done on a daily basis. Goals are set and regularly monitored and updated through comprehensive qualitative and quantitative indicators
Does the organisation reflect and learn from its activity?	No reflection or learning	Limited practices to reflect on the activities undertook. Nevertheless there are no learning outcomes underlined	Some practices to reflect and learn from the activities, mostly informal, not structured or documented	Clear practices to reflect and learn, in a participatory manner, having in mind feedback from beneficiaries/ stakeholders	The organisation reflects continuously on its learning (from needs analysis, stakeholder mapping, collecting feedback, documenting and debriefing activities etc.)
To what extent the organisation uses learning outcomes to grow?	No usage of learning outcomes	Limited practices to implement learning outcomes, mostly done informally	Some practices to use learning outcomes, only for activities and projects implemented	Clear and documented implementation of learning outcomes for all projects and programmes	The organisation is using learning outcomes for its growth and integrates all results in the overall activity and specific projects/ programmes



ORGANISATIONAL STRUCTURE

	None	Limited	Some	Clear	Comprehensive
To what extent the organisational structure is defined and functional?	No structure defined inside the organisation	No structure formally defined in the organisation even though informal reporting lines are understood by members/ staff/ volunteers	A formally defined structure exists in the organisation. Nevertheless this structure is not followed by members/ staff/ volunteers	Organisational structure is defined. Nevertheless there are some areas where reporting lines are not entirely clear	The organisation has a welldefined structure and clear reporting lines that are functioning in practice. Members/ staff/ volunteers understand the interdependency of all positions
To what extent the members/ staff/ volunteers of the organisation understand their roles and responsibilities?	No roles or responsibilities defined.	No formally defined roles and responsibilities, but informal division of work is established	The roles and responsibilities are formally defined, but they are not respected in all cases	The roles and responsibilities are defined and recorded. There is a job description for each position but the tasks are not always linked to the persons	There are clear roles and job descriptions for each position used for the division of responsibilities. The organisation is using them when assigning new task
To what extent the competences of people working with the organisation correspond to the organisation's needs?	New people are engaged based on availability and opportunity, not on organisation needs	Limited specific expertise for people working with the organisation that does not correspond to the needs	The organisation knows which skills/ expertise it lacks but does not actively try to include such expertise	The organisation knows which skills/ expertise it lacks and has a plan on how to include appropriate people in the organisation. However, there are inconsistencies at some level (e.g. recruitment based on previous involvement)	The organisation knows which skills/expertise it lacks and includes appropriate people in the organisation based on clear policies followed
How does the organisation take decisions?	There is no policy on decisionmaking. All decisions are done ad hoc.	Some consultations between closest members of the organisation, but decisions are generally done by the leader. The decisions are not communicated	Consultations between members of the organisation, but decisions are generally done by the leader. The leader informs members/ staff/ volunteers	The decisionmaking process includes members/ staff/ volunteers. It doesn't include other stakeholders (beneficiaries, donors etc.)	The organisation's decision-making process is participatory, transparent and communicated to all relevant stakeholders
Does the organisation take decisions based on its vision and mission?	The decision-making process is arbitrary and does not rely on vision and mission	The decision-making process is arbitrary and relies mostly on one leader. His/her views are not always in line with the organisation's vision and mission	The organisation consults the vision and mission when taking decisions. The decision still relies on one leader, that is in line with the vision and mission	The organisation consults the vision and mission when taking decisions. However, they are not always followed (e.g. if a funding opportunity appears the organisation will neglect vision and mission)	The decision-making process is dictated by the vision and mission and there are no decisions taken based on specific context, politics or funding opportunities



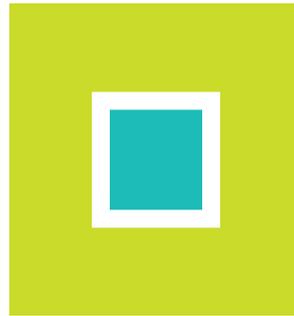
LEADERSHIP

	None	Limited	Some	Clear	Comprehensive
To what extent there is an appropriate mix of leadership and management in the organisation?	No leadership/ management mix	Limited mix, focus on management, leadership skills lack	Some mix, focus on leadership, management skills lack	Clear mix between leadership and management, not all skills covered are appropriate	There is an appropriate mix of leadership & management skills in the organisation that ensure good functioning
How is the formal and informal leadership recognized within the organisation?	Leadership is not recognized. The vision is not clear and leader(s) are not keen to changes	Leadership is recognized but the organisation depends on one person (leader) who solely provides the vision	Leadership is recognized, dependent on one person that involves others in visioning	Leadership is recognized and there are more leaders within the organisation. Leadership approach is "old school"	Leadership is recognized and shared in the organisation. The organisation is willing to take risks and try new approaches in order to grow
To what extent the leadership within the organisation provides motivation for staff/ members/ volunteers?	No motivation provided by leadership	Some motivation is provided by the leader(s) but the general thinking is that the staff/ members/ volunteers should be motivated just by the cause itself	Some motivation is provided by the leader(s), but not in a coherent/ systematic manner	Motivation is recognized as an integral part of leadership. The leader(s) spend time to motivate others and leading by example. The staff/ members/ volunteers are not encouraged to try new things or give feedback	Leadership delivers consistent, positive motivation to people. The organisation is led by "we can do it" approach and failures are accepted as a way of growing. There is a clear approach for new ideas to be introduced and implemented
To what extent the leadership is cultivating new leaders within the organisation?	No such culture. Leadership is afraid of new leaders and sees them as potential threat to their position	Cultivating new leaders is not recognized as part of the work of the organisation	No systematic approach for leadership cultivation but it happens spontaneously from time to time	Leadership is often cultivating new leaders within the organisation. Not all members/ staff/ volunteers are encouraged to become leaders. Leadership is aware of the importance of cultivating new leaders but lacks time/ skills	Leadership is constantly cultivating new leaders within the organisation or outside of it. Potential leaders are given support to become future leaders. There are special programmes/ activities in place to cultivate new leaders.
To what extent the leadership empowers people to develop personally and professionally?	Leadership does not empower people to develop	Personal and professional development is accessible only to a limited circle of members/ staff/ volunteers	Leadership empowers people to develop, but not in a coherent/ systematic way	Leadership often empowers people to develop but there are no individual plans	Leadership encourages and acts for all people's development, both personally and professionally. Members/ staff/ volunteers have individual plans for personal and professional development



HUMAN RESOURCE MANAGEMENT

	None	Limited	Some	Clear	Comprehensive
Does the organisation have recruitment practices?	No practices	Some general understanding on recruitment practices exists, mostly informal	Some guidelines for recruitment exist. Nevertheless they are often not followed in practice	Clear practices/ procedures for recruitment mostly followed with exceptions (for instance headhunting practices and direct contracting)	The organisation follows recruitment practices/ procedures for members/ staff/ volunteers. Organisation provides real equal opportunities for all
Does the organisation have induction practices?	No practices	Some induction is made but mostly informal	The organisation has awareness on the importance of induction. The leader(s) welcome new people. There are no clear practices/ procedures	Clear practices/ procedures for induction but no initial training/ meeting are provided. The organisation dedicates resources for the induction of new member/ staff/ volunteer	The organisation has induction and initial training/ meetings in place for members/ staff/ volunteers. New members also receive a "welcome pack" that includes organisation's vision and mission, organisational chart, principles and ethics, etc.
Does the organisation have personal and professional development practices?	No practices	Limited practices for development, mostly done informally	Some guidelines for development followed in the organisation but not fully documented (no coherent criteria)	Clear practices/ procedures for development, but no assistance is provided on an ongoing basis	The organisation has assistance and personal and professional development practices/ processes in place for members/ staff/ volunteers, based on assessment
Does the organisation have assessment practices?	No practices	Limited practices for assessment, mostly done informally	Some guidelines for assessment followed in the organisation but not fully documented (no coherent criteria/ description)	Clear practices/ procedures for assessment, but no follow-up is provided	The organisation carries out regular assessment for members/ staff/ volunteers and has follow-up methodology to ensure personal/ well-being and professional development the people
Does the organisation have recognition practices (recognize and reward work and behaviours)?	No practices	Limited practices for recognition, mostly done informally	Some guidelines for recognition followed in the organisation but not fully documented (no coherent criteria/ description)	Clear practices/ procedures for recognition of work, but no informal input (limited to formal recognition)	The organisation fully recognizes the work of members/ staff/ volunteers both formally and informally



BENEFICIARY INVOLVEMENT
(young people with fewer opportunities)

	None	Limited	Some	Clear	Comprehensive
To what extent the organisation plans its activities based on real needs assessment of beneficiaries?	No needs assessment done, the programmes and activities are planned based on assumptions and "gut feelings"	Some assessment is done but not systemized. No plan for beneficiary involvement, feedback based on their initiative	Some practices for needs assessment, but not coherent criteria or methodology/ no constant data gathering	Clear needs assessment is integral part of organisational activities. Nevertheless, activities don't always follow the results. Beneficiaries involved are usually just the ones who are already active in the organisation	Needs assessment is an integral part of organisational activities. The organisation plans its projects/ programmes based on the results of the assessments. A broad variety of current and potential beneficiaries are involved in the assessment
To what extent the beneficiary take on various roles in the organisation?	No involvement of beneficiaries	Limited involvement, mostly informally/ not structured	Beneficiaries can influence the organisations projects and programme to some extent, mostly on a call to action basis	The organisation shapes all activities together with beneficiaries but most of the work is still done by others	The organisation actively encourages beneficiaries to take responsibility and independently take on a wide variety of roles in organisation. The organisation encourages beneficiaries to become members/ staff/ volunteers
To what extent the organisation involves beneficiaries in the activities?	The beneficiaries are passive participants of their activities	Limited involvement, mostly informally/ not structured	Beneficiaries are somewhat involved in the activities, mostly at the practical/ logistical level	Beneficiaries are involved in the activities of the organisation, but not in all phases	Beneficiaries are involved in all phases of the activities, from identification of needs, defining indicators, design and implementation of activities and follow-up
Does the organisation involve new beneficiaries?	No new beneficiaries recruited	Limited involvement of new beneficiaries, not structured/ not intentional	New beneficiaries are recruited, only for specific activities which require more participants	New beneficiaries are recruited, but no practices to welcome them in the organisation	Variety of systems in place to actively recruit and involve new beneficiaries as part of the organisational strategy
Does the organisation empower beneficiaries?	No involvement of beneficiaries	Limited involvement, mostly informally/ not structured	Beneficiaries are somewhat empowered to act, but still the organisation takes care of all the aspects/ the whole process	Beneficiaries are empowered to act, mostly at a small scale level by small activities	Beneficiaries are empowered to mobilise and advocate on their own behalf, the organisation fully provides the tools for them to do it themselves



ADVOCACY

	None	Limited	Some	Clear	Comprehensive
To what extent the organisation is active in advocacy activities?	Advocacy is not on organisation's agenda	Advocacy is on organisation's agenda only on ad hoc occasions	Advocacy is on organisation's agenda, mostly reacting with no clear agenda	Clear involvement, proactive in following an agenda. However, sometimes the advocacy efforts go beyond the organisation vision and mission	The organisation is proactive in advocacy initiatives in line with its mission
To what extent the organisation advocates on behalf of its beneficiaries?	The organisation does not involve beneficiaries in their advocacy actions	The organisation occasionally consult beneficiaries in their advocacy actions but not in a systematic manner	The organisation regularly consults beneficiaries for advocacy actions. The interests of the beneficiaries and those of the organisation are not always the same	The organisation has a clear system for beneficiary involvement in their advocacy actions but don't always follow their suggestions	The organisation advocacy efforts and messages are consistent and coherent to the best interest of the beneficiaries
To what extent the organisation has the skills to advocate on behalf of its beneficiaries?	No advocacy skills in the organisation	The organisation has some skills, mostly accumulated informally/ not structured	The organisation is aware of special skills needed invests resources. Nevertheless, no person has the capacity to do advocacy	The organisation has the basic advocacy skills to work on significant issues. The organisation invests some resources in advocacy skills but there is still low specialization	The organisation has the skills to work on significant issues, at all levels and in the best interest of its beneficiaries
Does the organisation engage the community into advocacy issues?	No engagement of the community	Limited engagement, mostly informally/ not structured	Some engagement, mostly done via other events organized by the organisation	Clear engagement of the beneficiaries/ the community into advocacy issues, but no empowerment of the community to act on its behalf	The organisation engages and empowers beneficiaries/ the community in advocacy issues that affect people's lives
Does the organisation build alliances/ networks/ coalitions for advocacy/ policy work?	No involvement in alliances/ networks/ coalitions	Limited involvement, mostly informally/ not structured	Some involvement, mostly at the invitation of other stakeholders, not proactive	Clear involvement, proactive inside different structures more involved in the subject rather than the advocacy/ policy work	The organisation initiates alliances/ networks/ coalitions with other stakeholders for specific and effective advocacy/ policy work

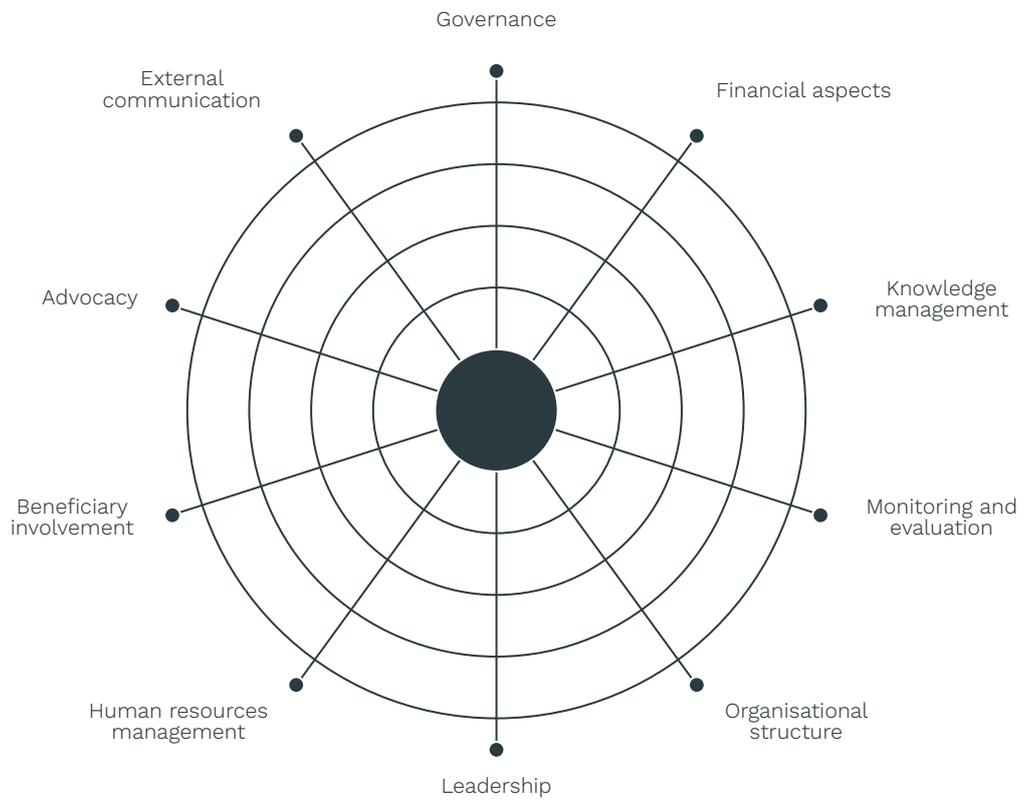


EXTERNAL COMMUNICATION

	None	Limited	Some	Clear	Comprehensive
Does the organisation have a clear identity/ branding?	No identity/ branding	Limited identity/ branding, just a logo	Some identity/ branding, but no clear vision of it/ not everyone in the organisation uses it	Clear identity/ branding used by everyone, but not the base of all information activities	The organisation has a proper identity/ branding that is the base for informing constantly the community on its activities
Does the organisation have a coherent communication plan?	No communication plan. The organisation acts only on donors' requirements (if the case)	There is no communication plan but an overall agreement on general messages of the organisation	Some guidelines for the communication plan. The organisation communicates its key messages but has troubles connecting them to individual project goals	Clear communication plan and key messages that are coordinated and correspond one to another. Nevertheless, target groups are not specifically defined	The organisation has a proper communication plan that includes consistent key messages, defined target groups and ways to approach them
To what extent does the organisation use different communication channels?	The organisation is not aware of different communication channels and uses only one source of information sharing (e.g. web page, newsletters)	The organisation uses different communication channels (web page, newsletters, FB page) but the information is not adapted to different target groups	The organisation is using different communication channels for different news. It adapts the information to specific format. It still relies mostly on its own media (web page, FB, newsletters)	The organisation uses variety of different channels and takes into account different publics. It also cooperates with others for communication purposes (platforms, mass media, forums etc.)	The organisation selects the most appropriate channel for news they promote. The information is adapted to specific needs and target groups and uses a variety of channels
Does the organisation get involved with the mass media?	No involvement with the mass media	Limited involvement with the mass media, not structured, mainly through sending press releases	Some involvement with the mass media, sending clear/ structured information but not constantly (mainly for specific events)	Clear involvement with the mass media, constantly informing them by more than one means, not influencing their agenda	The organisation has good partnerships and constant communication with the mass media, influencing their agenda, being a credible source of information
To what extent the organisation is transparent and accountable?	The organisation has no policy on transparency and accountability	The organisation is generally aware of the importance of transparency and accountability but lacks the willingness to actively work on it	The organisation is generally aware of the importance of transparency and accountability but provides information only on demand (usually just to donors)	Clear transparency and accountability, not to all stakeholders and mostly through published annual report or other reports. The information might still be accessible only to members, donors, beneficiaries and not to general public	The organisation actively promotes transparency and accountability and leads by example. It is proactive in its transparency – publishes information online and enables access to all

For each question related to all 10 items in the self-assessment matrix, please find the most appropriate level in which your organisation can be framed based on its current development. Give points to each level as follows: None = 0 points; Limited = 1 point; Some = 2 points; Clear = 3 points; Comprehensive = 4 points. For each indicator, calculate the average score and place it on the figure below. (e.g. for the Governance indicator, if the total sum of points gathered for all 5 questions is 17, then the average score is 3.4).

After going through the indicators and having for each of them the average score, place them on the figure below (on each line corresponding to each indicator, starting from 0 points at the bottom of the line and going up to 4 points at the end of the line) and you will have a visual representation of your current organisational development.



PLEASE USE THE FOLLOWING SPACE FOR EACH INDICATOR TO WRITE COMMENTS/OBSERVATIONS AFTER APPLYING THE MATRIX FOR YOUR ORGANISATIONS:

1. GOVERNANCE

2. FINANCIAL ASPECTS

3. KNOWLEDGE MANAGEMENT

4. MONITORING & EVALUATION

5. ORGANISATIONAL STRUCTURE

6. LEADERSHIP

7. HUMAN RESOURCE MANAGEMENT

8. BENEFICIARY INVOLVEMENT (young people with fewer opportunities)

9. ADVOCACY

10. EXTERNAL COMMUNICATION

7. INSTRUMENTS for organisational development

Organisational development is focusing on change. In order for change to happen it is important that organisations are willing to change. However, change does not mean starting from scratch. Change implies assessing past experiences, adapting to the present needs and having in mind the future. All from the perspective of the organisation vision and mission.

Through this toolkit we propose a series of instruments that can help organisations to better approach organisational development, in certain areas of intervention. These areas are the 10 indicators from the self-assessment matrix. Based on the results of the evaluation, organisations can find and apply these instruments in order to increase the areas which are not developed or areas they want to better address.

The instruments are easy to apply, flexible and they provoke critical and creative thinking. We propose instruments that are in line with all the indicators from the matrix, and that we consider a minimal standard for any organisation to be(come) more professional, no matter the size, the location/ country, the number of beneficiaries involved or themes of interest for projects and programmes.

Each chapter/ area of development in the toolkit consists of:

- Theoretical information about the topic - relevant information on the topic, quoted and adapted from different important sources for each area.
- Fill in templates - ready-to-use templates that just need to be filled in with specific information related to the organisation.
- Exercises - out-of-the-box creative exercises that invite organisations to think on different subjects from another perspective or from the same perspective but in a more structured manner.

Also, as a bonus, the toolkit includes an instrument that helps organisations to implement a strategic planning process.

All of the above mentioned instruments can be self-applied and easily implemented inside organisations. However, if there is a need for help, we can always assist you in applying the instruments.



GOVERNANCE

GOVERNANCE

DEFINITION

“Governance involves a set of relationships between an organisation’s management, its Board and other stakeholders. Governance also provides the structure through which the objectives of the organisation are set, and the means of attaining those objectives and monitoring performance are determined.”
(Organisation for Economic Co-operation and Development, 2004)

WHY IS GOVERNANCE IMPORTANT?

- assures strategic running of the organisation, that ensures its development;
- enhances effective decision-making in the organisation, leading to a good management;
- protects the organisation from dangerous/ unethical risks;
- promotes stakeholder`s confidence in the organisation;
- puts emphasis on the long-term/ forward-looking perspective which always has in mind the vision and mission of the organisation.

MODELS OF GOVERNANCE BODIES

There is no “correct” way for the governance body to function. Even though there are some general guidelines for different types of NGO structures and different legislation related to the nonprofit sector, depending on each country, each organisation should have a functional governance body according to its own needs and context. Models of governance may differ from country to country, from the size of the organisation, from its mission and beneficiaries they work with.

“

Policy Governance Model

This model focuses on the single organisation and clearly distinguishes between the leadership roles of board and executive director/ president. The board's role is one of stewardship. The executive director/ president provides operational leadership and manages the organisation to fulfil its mission.

Constituent/Representative Board Model

In this model there is a direct and clear link between the organisation's board and its constituents. The constituents are usually represented on the governing board and participate in policy development and planning. This participation benefits the constituents by offering them control over policy decisions through their board representative.

Entrepreneurial Board Model

This model has a particular emphasis on innovation and often this appears as a focus on efficiency and effectiveness measures which push the organisation to achieve a maximum return on its "investments". In this model, there is an explicit recognition of stakeholder self-interest.

Emergent Cellular Model

Cellular Model is characterized by distributed networks and continuous and organic innovation. Cellular organisations are made up of cells that can operate alone but that can also interact with other cells to produce a more potent and competent organisational mechanism.

”

Adapted from: Bradshaw, Patricia. Non-profit Governance Models: Problems and Prospects. The Innovation Journal: The Public Sector Innovation Journal, Volume 12(3), 2007, article 5.

FOOD FOR THOUGHT: Theory of change?

In a world that is rapidly evolving, organisations should take into consideration changes that are happening all the time because the context in which the organisation is working is their playground. Thus it is important to be always adapted to it. Changes can happen in government/ political structures, in environment, technology etc. and we must adapt our activities/ projects/ programs in order to still have the desired impact. The Theory of Change proposes one way to look at this issue.

“

“Theory of Change is essentially a comprehensive description and illustration of how and why a desired change is expected to happen in a particular context. It is focused in particular on mapping out or “filling in” what has been described as the “missing middle” between what a programmes or change initiative does (its activities or interventions) and how these lead to desired goals being achieved. ToC maps out your initiative through 6 stages:

1. *Identifying long-term goals*
2. *Backwards mapping and connecting the preconditions or requirements necessary to achieve that goal and explaining why these preconditions are necessary and sufficient.*
3. *Identifying your basic assumptions about the context.*
4. *Identifying the interventions that your initiative will perform to create your desired change.*
5. *Developing indicators to measure your outcomes to assess the performance of your initiative.*
6. *Writing a narrative to explain the logic of your initiative.*

”

*Adapted from: What is theory of change? How does Theory of Change work?
The Center for Theory of Change, Inc. 2017*



GOVERNANCE

ORGANISATIONAL DEVELOPMENT INSTRUMENTS

ETHICS/ VALUES

Please use the following example to create a policy related to ethics in your organisation, continue the exercise based on your organisational values:

1. RESPECT FOR ALL HUMAN RIGHTS

The organisation shall recognize and respect the rights of every individual and treat everybody within and outside of the organisation with respect, no matter the possible differences related to age, different ability, social status, nationality, religion, race or ethnicity, gender and identity, sexual orientation, health status, etc.;

2. ACCOUNTABILITY/ TRANSPARENCY

The organisation shall be accountable to stakeholders/ the community, provide accurate information on its activities and accept responsibility for the outcomes of own actions;

3. INDEPENDENCE

The organisation and all its members/ staff/ volunteers shall operate independently and will not allow pressure from others to influence their work;

4. EMPOWERING YOUNG PEOPLE

The organisation shall empower beneficiaries/ young people to make own decisions and take action as agents of change;

5.

6.

GOVERNANCE SKILLS

Give your definition of governance in the section below:

“

“

What is the highest governance body in your organisation?
Name it and describe its compenence:

Write the tasks and responsibilities of your governance body:

Based on the tasks and responsibilities of your governance body, please fill in the table below:

Competencies that your governance body has in order to fulfil its tasks and responsibilities	Competencies that your governance body lacks in order to fulfil its tasks and responsibilities	How can your governance body get the competencies that are lacking? Who do you know has the competencies you need and could become part of your governance body?

LEGAL OBLIGATIONS

Make a list of rules/ laws from your national legislation that the organisation has to take into account in order to legally carry out its activity (e.g. Fiscal Code etc.)

Legislation (name of law, issue, etc.)	What is it about/ why is it important	Link



FINANCIAL ASPECTS

FINANCIAL ASPECTS

DEFINITION

“Financial management may be defined as that area or set of administrative function in an organisation which relate with arrangement of cash and credit so that organisation may have the means to carry out its objective as satisfactorily as possible.” (Howard & Opton, 2015)

WHY FINANCIAL ASPECTS ARE IMPORTANT?

- assures the efficiency of the daily operations of the organisation;
- enhances the functioning of the organisation in a long-term/ sustainable manner;
- reduces the possibility of malpractices and illegal deeds;
- the organisation becomes accountable to donors, whether individual, public or private;
- improves reputation with stakeholders, gaining trust and reliability.

TIPS FOR FUNDRAISING

In order for an organisation to function, we need resources. Human, natural and capital. Fundraising takes into account the needs of the organisation and secures resources for these needs. Fundraising also takes into account all the means through which we can provide resources for the organisation through grants, corporate or individual donors, service providing etc. Some ideas to take into consideration when doing fundraising:

1. Make a plan. Fundraising should always start with a plan. Map out activities/ projects/ programs that need resources and set goals and actions for each of them (see instruments provided in this chapter). And whatever you do, do not go first for the money and after for the idea!
2. Think beyond money. When we first think about fundraising we think about money. Which is true, we do need financial support for almost all our activities. Nevertheless, we should also focus on what services we can get or other resources we can use from others (e.g. a conference room or pro-bono work).

3. Make a list. Having a list of donors - whether they are public or private - makes our lives easier. Not to mention it will stay in the organisation and everyone can use it. Take on that list donors who you already interacted with or possible future donors (sample list of funding opportunities provided in this toolkit).
4. Use online fundraising tools. They are a great way to fundraise for limited amounts of money or small projects/ initiatives. It is easy but involves some extended communication from your side. Online tools are easy to find on the internet - for instance check out this one: <https://www.softwareadvice.com/nonprofit/neoncrm-profile/>.
5. Make it personal. Even though it might help to always have a dedicated presentation/ fundraising letter for your organisation, a general one, try to make it as specific as possible when meeting different donors. Each donor has a different reason for which they give out resources, so try to respond to that reason.
6. Create a team. Or have a dedicated person dealing with fundraising. Make your governance body involved in this. Empower everyone from the organisation to actively lookout for possible donors and ask them to fill in the list of donors. Ask friends if they can help you out (by writing a presentation or even a project for funding).
7. Make it ethical. First the mission and then the resources. The most common mistake of organisations is to go for funds that are out of their mission statement. Moreover, some of them modify their mission just to get the money. This takes you out of the nonprofit sector and puts you in the for profit one. Try not to go there and try to get the most appropriate resources for following the vision and mission you were born for.

OTHER IDEAS FOR FUNDRAISING: funding programmes for youth

https://eacea.ec.europa.eu/erasmus-plus_en

The European Union's Erasmus+ programme is a funding scheme to support activities in the fields of Education, Training, Youth and Sport.

<https://www.coe.int/en/web/european-youth-foundation>

The European Youth Foundation is a fund established by the Council of Europe to provide financial and educational support for European youth activities.

<http://www.culturalfoundation.eu/grants-exchange>

The European Cultural Foundation supports cultural change makers and their projects through our grants and exchange programmes.

<https://www.elizabethgreenshieldsfoundation.org>

The foundation offers annual grants to young and talented artists. No deadline for application process.

<https://www.google.com/nonprofits/index.html>

With Google for Non-profits, you'll be able to fundraise more easily, collaborate more efficiently, and share your story with a wider audience.

<http://www.kas.de>

Cooperation areas: supporting democratic development, building a civil society, upholding free mass media and consolidating democratic institutions.

<http://www.gmfus.org/gmf-pillar/civil-society>

The German Marshall Fund supports civil society by fostering democratic initiatives, rule of law, and regional cooperation.

<https://www.ned.org>

The organisation actively supports initiatives that promote democracy, cooperation and citizen participation. Applications are decided quarterly.



FINANCIAL ASPECTS

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

FINANCIAL CHECKLISTS

Please read the items from the list below and check/ tick what applies to your organisation. If some of the items are not checked/ ticked, you can consider integrate them into your current financial practices:

The organisation has at least basic accounting records so that payments can be easily tracked (e.g. cashbook, file of invoices/ receipts for all expenditures, etc.)	
The organisation has additional accounting records (e.g. payroll records, journal book, etc.).	
The organisation updated the basic records at least once in a week, when there are incomes.	
The organisation undertakes checks on accounting records (e.g. cross checks between bank statements and income and expenditure records, internal/ external auditor).	
The organisation is aware and complying with all the accounting requirements of the national legislation and its statutory and governing documents.	
The organisation produces financial statements (e.g. balance sheet and profit and loss or income and expenditure account).	
The organisation has a clear documented overview of who signs what and within what limits (e.g. banking, procurement and payments, contracts, etc.)	
The organisation has at least two people who sign the financial documents, in order to make a double check.	
The organisation has an overview of controls over incoming funds (e.g. numbered and duplicated receipts issued for all incoming cash and cheques, etc.)	
The organisation uses different bank accounts for different projects held in the name of the NGO and has a clear flow of the incomes and expenditures in the accounts.	

CASH FLOW PROJECTION

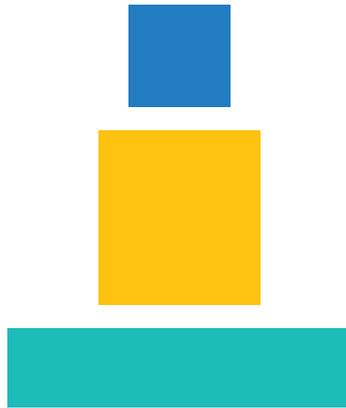
Please fill in the next chart, based on the projections of your own organisation. For a better use of the instrument, please visit www.odyotoolkit.eu

Annual Financial Projection										
Youth Organisation Name:										
		1st Quarter		2nd Quarter		3rd Quarter		4th Quarter		Total
Previous Balance		EUR		EUR		EUR		EUR		
Income										
	Membership fees									
	Donations									
	Project 1 Grant									
	Project 2 Grant									
	Income subtotal		EUR		EUR		EUR		EUR	EUR
Income Balance										
Expenditure & Costs										
	Rent									
	Electricity									
	Staff costs									
	Employment taxes									
	Project 1 Costs									
	Project 2 Costs									
	Expenditure Subtotal		EUR		EUR		EUR		EUR	EUR
Quarter Balance			EUR		EUR		EUR		EUR	EUR

FINANCIAL RISK

Please review your current financial income and assess the level of risk based on different sources:

Source of income	What is the amount of income per year?	When is it likely to end (if you know)?	What proportion of your organisation's total income comes from this source?	What is the level of risk in that income stream (of it suddenly reducing or ending)?		
				Low	Medium	High
Donations						
Projects/ grants						
Crowd-funding						
Fundraising events						
Membership fees						
Income generating activities/ service providing						
In-kind contributions						
Investments						
Others						



KNOWLEDGE MANAGEMENT

KNOWLEDGE MANAGEMENT

DEFINITION

"Knowledge management is a discipline that promotes an integrated approach to identifying, capturing, evaluating, retrieving, and sharing all of an enterprise's information assets. These assets may include databases, documents, policies, procedures, and previously un-captured expertise and experience in individual workers." (Duhon, 1998)

WHY IS KNOWLEDGE MANAGEMENT IMPORTANT?

- ensures all important information and resources can be accessed by staff/ members/ volunteers whenever it is needed;
- assures that important knowledge is kept in the organisation even after staff/ members/ volunteers leave;
- regulates the policies and procedures in order for the organisation to function better;
- avoids that efforts are duplicated and people do not do the same thing twice;
- takes advantage of past and present expertise in order to build the future on it.

A LEARNING ORGANISATION

Nongovernmental organisations, especially youth organisation, do not generally put emphasis on knowledge management. Even though we would encounter in some organisations track records of past activities and their results or even if organisations do have a more or less coherent system to collect information related to these activities or information related to beneficiaries, staff, volunteers, experts, donors etc., very few organisations actually learn from this information. In order to become a learning organisation past or present information needs to be translated into lessons learnt and these lesson need to be integrated into future activities of the organisation. In this sense, some elements for learning organisation might help

“

Four Elements of Organisational Learning

First, leaders must champion organisational learning. They need to demonstrate their commitment by setting a vision and goals for learning connected to furthering the mission. And they must act as role models by participating in learning activities.

Second, leaders need to foster a culture of continuous improvement that values organisational learning. The culture reinforces learning by providing incentives for learning behaviours and by measuring and communicating results of learning.

Third, the organisation needs to define a learning structure that specifies the people who are accountable for capturing, distilling, applying, and sharing knowledge. The structure also should include networks and coordinating tactics that help information flow among the people who need it, when they need it.

Last, the organisation must design intuitive knowledge processes that are aligned to how people work. These processes specify how staff members define a learning agenda, and how they capture, distil, and apply knowledge. These processes also include the technology systems for exchanging knowledge, but they need to keep people-to-people interactions at the heart of them.

”

Adapted from: Smith Milway, Katie; Saxton, Amy. The Challenge of Organisational Learning. Stanford Social Innovation Review, 2011.

FREE ONLINE TOOLS FOR MANAGEMENT or databases/ Google Docs

google.docs.com

Microsoft Word, Excel, PowerPoint and PDF documents for free.

<https://asana.com>

Asana is the easiest way for teams to track their work and get results.

<https://www.projecturf.com>

Manage projects, people, and tasks; create and assign tasks, share files, collaborate with others, track time and budgets, calendar events and get things done.

<https://www.huddle.com>

Secure document collaboration for teams, enterprises and government organisations.

<http://goplanapp.com>

Goplan lets you keep track of your projects and collaborate with your colleagues securely through an intuitive user interface.

<https://glip.com>

Break out of your inbox with team messaging, video collaboration, file sharing, tasks, and more.

<https://www.onehub.com>

A better way to securely store and share your business files in the cloud.

<http://thrivesolo.com>

Thrive is a great assistant and an elegant way to ensure your creative projects run smoothly.

<https://www.onlyoffice.com>

The most complete and feature-rich office and productivity suite.

<https://www.proworkflow.com>

Project management software your team will love!

<https://www.flowdock.com>

Real-time, transparent teamwork for your entire organisation.

STAFF MEETING AGENDA PROPOSAL (60 minutes):

- Start ten minutes earlier than usual (e.g. 17:50 instead of 18:00).
Design the first ten minutes to have an icebreaker (each time a different one, making it a contest among colleagues)
- Announcements and news – 10 Minutes.
In order to be more interactive you can place a different announcement task each time (tell it in poetry or lyrics, sing it, etc.)
- Recognition of staff – 10 Minutes.
Make space to thank someone from the team (or the entire team) for a thing they did from the last time you have met.
- Project updates – 20 Minutes.
Make small discussion groups so that each project manager/responsible can tell in short about the project/ activity. Then ask someone from the group to make an even shorter brief to the entire group. You can also use someone from the team to create a graphic image of the presentations and use it to post online/ on your social media after the meeting.
- Future schedules – 5 Minutes.
Put post-it on wall with future plans/ projects/ events (both international and local events).
- Open space – 5 Minutes.
Leave space for people to address any other issue that concerns them. Remove the chairs and hold the rest of the meeting standing. It`ll make it shorter. If it is an important concern, do not take this idea into account!



KNOWLEDGE MANAGEMENT

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

COLLECTING INFORMATION

Please look at the following table and fill it in with information from your organisation. This can serve as a simple template to collect data at organisational level

Project/ programme	Dates (when was it done)	Outcomes/ Results	Beneficiaries (target groups)	Responsible person (who)	Specific experts (who, what field of expertise)	Cost of the project (amount)	Sponsor/ donor (contact)

For a better use of the instrument, please visit www.odyotoolkit.eu

EXERCISE ANNUAL REPORT TEMPLATE

Information to include in the annual report:

- General information of the organisation (vision, mission, main activities etc.)

- Editorial from board/ president/ executive director what was the consistency of the activities in the year towards the organisation vision and mission

- Overview in short of the year (number of projects, number of beneficiaries etc.) – visual/ infographic

- Achievements (not presentation of activities!)

- Presentation of the team (board or staff/ volunteers)

- Story of the year - article

- Information on the annual budget breakdown (how much money from what sources – expenditures for different categories)

- Sponsors/ donors

- Call to action for next year

Ideas for annual template formats:

<https://www.lucidpress.com/pages/templates/reports/annual>



MONITORING AND EVALUATION

MONITORING & EVALUATION

DEFINITIONS

What is monitoring?

“Monitoring can be defined as a continuing function that aims primarily to provide the management and main stakeholders of an ongoing intervention with early indications of progress, or lack thereof, in the achievement of results. An ongoing intervention might be a project, program or other kind of support to an outcome.”
(The World Bank, 2007)

What is evaluation?

“Evaluation is the systematic and objective assessment of an on-going or completed project, program, or policy, and its design, implementation and results. The aim is to determine the relevance and fulfillment of objectives, development efficiency, effectiveness, impact, and sustainability.”
(The World Bank, 2007)

WHY IS MONITORING AND EVALUATION IMPORTANT?

- enhances a good fulfilment of targets, whether they are at project level or at organisational level;
- helps the organisation to keep track of milestones and review outcomes, in order to be accountable;
- creates the opportunity for learning and better decision making in future actions;
- facilitates the understanding of the impact that the organisation has in the community, over its beneficiaries;
- promotes the organisation as trustworthy to stakeholders and other parties.

MONITORING AND EVALUATION METHODS

Monitoring and Evaluation are important for the organisation to assesses its activities in order to achieve goals (whether for projects/ programmes or for general activity of the organisation). Most of the times we do not do it or we do it because we have to. This needs to be addressed more inside organisations and create a mind set for everyone in order to do this regularly and coherently. For this we do not need to reinvent the wheel, since there are already methods that we can use.

“

1. *Performance indicators (KPI). These measure inputs, processes, outputs, outcomes and impacts of development interventions.*
2. *The logical framework (LogFrame) approach. This identifies objectives and expected causal links and risks along the results chain.*
3. *Theory-based evaluation. Similar to the LogFrame approach, this provides a deeper understanding of the workings of a complex intervention.*
4. *Formal surveys. These are used to collect standardised information from a sample of people or households.*
5. *Rapid appraisal methods. Interviewing, focus groups and field observation.*
6. *Participatory methods. Agoras, World caffè, Photovoice, etc.*
7. *Cost-benefit and cost-effectiveness analysis. These tools assess whether the cost of an activity is justified by its impact. Cost-benefit measures inputs and outputs in monetary terms, whereas cost-effectiveness looks at outputs in non-monetary terms.*
8. *Impact evaluation. This is the systematic identification of the effects of an intervention on households, institutions and the environment, using some of the above methods.*

”

Adapted from: Monitoring and Evaluation: Some Tools, Methods and Approaches, The World Bank Operations Evaluation Department, 2002.

FOOD FOR THOUGHT: The Most Significant Change

Besides being a burden or something that we have to, monitoring and evaluation can be also innovative. In fact, nowadays we often seek and speak of innovation. Which can be something totally new (invented) or something that already exists but used in a different manner or for different target groups. We can take inspiration from what is already being used in the organisation and adapt or use it in other settings. Or we can research on different other ways in which we can monitor and evaluate. And one idea is to look at storytelling, That is integrated into the Most Significant Change technique.

“

The most significant change (MSC) technique is a form of participatory monitoring and evaluation. The process involves the collection of significant change (SC) stories from the field level, and the systematic selection of the most important of these by panels of designated stakeholders or staff. The designated staff and stakeholders are initially involved by ‘searching’ for project impact. Once changes have been captured, various people sit down together, read the stories aloud and have regular and often in-depth discussions about the value of the reported changes. When the technique is successfully implemented, whole teams of people begin to focus their attention on program impact.

”

*Adapted from: Davies, Rick; Dart, Jess.
The “Most Significant Change” (MSC) Technique. A guide to its use, 2005.*



MONITORING AND EVALUATION

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

MONITORING

Fill in the chart below to have on-going information related to different projects/ programs of the organisation:

	Objective(s)	Activities, in short	Results envisaged	Quantitative Indicators	Qualitative indicators	Means of verification	Responsible person	Lessons learned
Project 1								
Programme 1								

EVALUATION

Please see the chart below and use it as a template to evaluate a project/ program in your organisation:

Quality of outputs	
Stakeholder involvement	
Appropriateness of the project design (the work flow, indicators, means of verification, risks to project success)	
Technical, financial and managerial aspects	
Project organisation (files, technical and financial data, reports, financial documents, etc.	
Probable future trends at the end of the project	
Cost effectiveness	
Achievement of project objectives	
Effectiveness of managing unexpected situations	

LEARNING/ FEEDBACK

Whether it is a project, a current activity or the entire activity of the organisation, please take the following questions and collect feedback from members/ staff/ volunteers or beneficiaries of the organisation:

1. HOW WAS THE PROJECT FOR YOU, IN GENERAL?
What do you remember the most?

2. DID YOU ENCOUNTER SOME CHALLENGING MOMENTS?

3. DID YOU HAVE ANY “AHA” MOMENTS?

4. WHAT WOULD YOU DO DIFFERENTLY IN THE FUTURE?

5. OTHER COMMENTS

IMPACT ASSESSMENT

Follow the next steps to reflect over activities of the organisation and write about their impact:

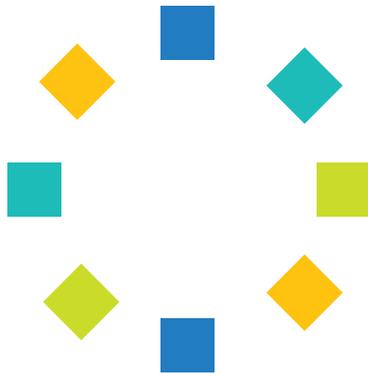
1. THINK ABOUT AND DESCRIBE SHORTLY one of the most important (in your opinion) project or programme of the organisation:

2. WRITE DOWN SOME OF THE SIGNIFICANT CHANGES or results of the project/ programme:

3. AMONG THE CHANGES/ RESULTS SELECTED, what do you think was the most significant change/ results? Please write why below

4. CREATE A SHORT STORY that describes this significant change/ result: (think about and write a particular story related to a person/ beneficiary or an important event etc.)

Adapted from <http://www.mande.co.uk/docs/MSCGuide.pdf>



ORGANISATIONAL STRUCTURE

ORGANISATIONAL STRUCTURE

DEFINITION

“An organisational structure defines how activities such as task allocation, coordination and supervision are directed toward the achievement of organisational aims.” (Pugh, 1990)

WHY IS ORGANISATIONAL STRUCTURE IMPORTANT?

- enhances achieving of aims and results, following the mission of the organisation;
- ensures that decisions are made inside the organisation by providing appropriate decision chains/ practices;
- provides an understanding of “who does what”;
- assures that the right people are doing the right tasks;
- fosters team work and team cooperation inside the organisation in order to better manage change.

TYPES OF STRUCTURE

Organisational structure differs from organisation to organisation. Some have as the highest governing body the General Assembly of the members. Some have a board of trustees and are not membership based. Some are hierarchical, with clear reporting lines among members/ staff. Some have flatter structures, in which hierarchy is replaced with a more consensual network type of decision-making process. This relates to the scope of the organisation, the size, the context in which it operates and organisations have to take into consideration the most appropriate structure so that they are efficient in their intervention. However, organisations tend to get stuck in the way they do things and do not think about possible changes in their structure, especially when they are not functioning properly. Having in mind that organisational development did arise from the business sector, many organisational change/ development theories could also apply to the nonprofit sector. Could recent approaches in organisational structure be also implemented in the NGO sector?

“

The traditional hierarchy

This type of a model makes sense for linear work where no brain power is required and where the people who work there are treated like expendable cogs.

Flatter organisations

Unlike the traditional hierarchy which typically sees one way communication and everyone at the top with all the information and power; a “flatter” structure seeks to open up the lines of communication and collaboration while removing layers within the organisation.

Flat organisations

Unlike any other structures, flat organisations are exactly that...flat. Meaning there are usually no job titles, seniority, managers, or executives. Everyone is seen as equal. Flat organisations are also oftentimes called or referred to as self-managed organisations.

Flatarchies

Somewhere in between hierarchies and flat organisations lie flatarchies. These types of structures are a little bit of both structures. They can be more hierarchical and then have ad-hoc teams for flat structures or they can have flat structures and form ad-hoc teams that are more structured in nature.

Holacratic organisations

The basic goal with this structure is to allow for distributed decision making while giving everyone the opportunity to work on what they do best.

”

Adapted from: Morgan, Jacob. The 5 Types Of Organisational Structures: Part 1, The Hierarchy. Forbes, July 6, 2015.

CRITERIA FOR MAKING DECISIONS

Sometimes, the decision making process can be hard. Or not comprehensive/ understandable to all members/ staff/ volunteers. Or even incoherent as a practice. Thus, it is important that organisations have in mind the most appropriate process for decision making, so that each activity/ project/ program is well addressed and implemented, in line with the organisation vision and mission. When choosing the most appropriate approach to making decisions, we can have in mind some criteria.

“

1. *Technical Precision* – some decisions may need a higher degree of “correctness” than others. The margin for error is slight.
2. *Commitment* – some decisions will, quite logically and emotionally, fit with the understandable interests of the group, and their buy-in is critical to the overall outcome.
3. *Time Urgency* – participatory decision making requires more time than autocratic decisions, and because time is a valuable, non-transferable, perishable and inelastic commodity, moving decisions to the lowest amount of time possible seems forever desirable.
4. *Team Development* – it allows the opportunity for team members to participate in decisions is a reward and it develops team members, (...) it allows them to wrestle with the dilemmas facing the organisation. If group members better understand the situation, many of the decisions they will make throughout their career will be made in the light of day, knowing what’s going on.
5. *Member Maturity* – somewhat different from development, this variable invites the decision maker to consider the present level of team member functioning, and to project the next step in their competence growth plan – to move the decision just a little out of reach, stretching them

”

Adapted from: Murray, Donald G. Decision Making for Group Action - Deciding How to Decide. Don Murray & Associates, 2007

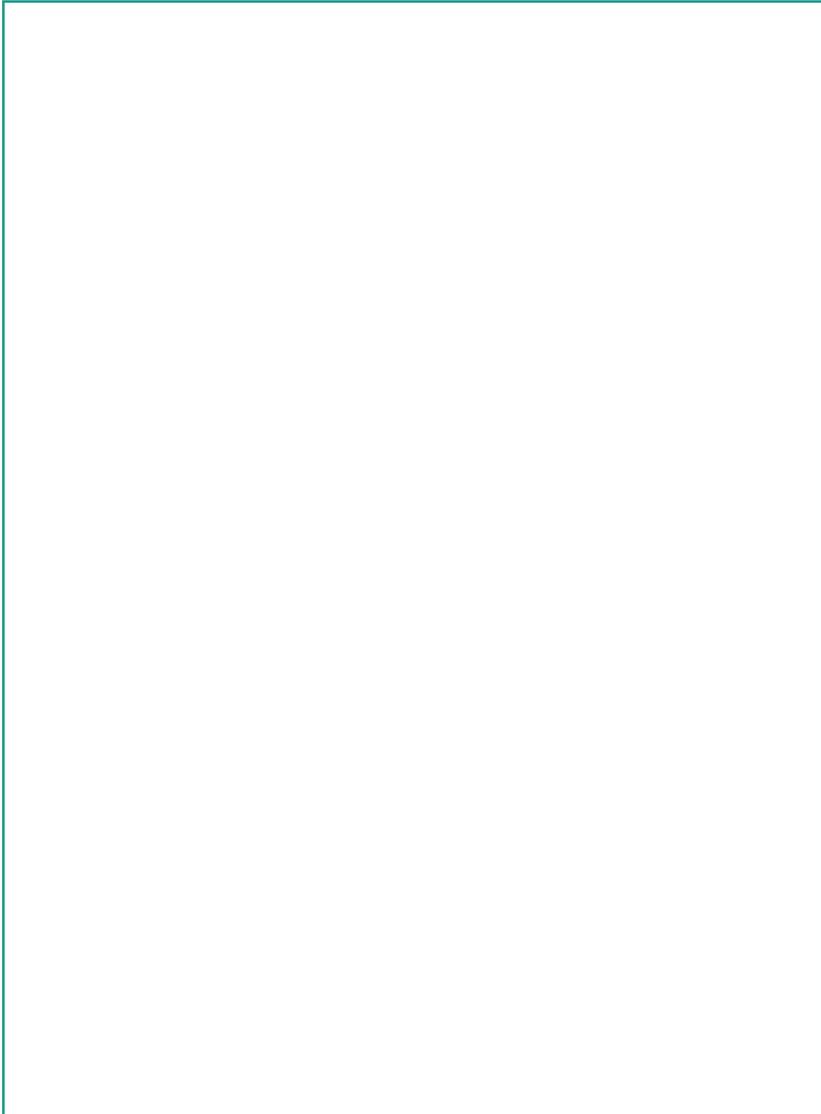


ORGANISATIONAL STRUCTURE

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

ORGANIGRAM

Think about your organisation and create/ draw a visual structure of the positions/ jobs/ departments/ groups and how they interconnect.

A large, empty rectangular box with a thin teal border, intended for drawing an organization chart or diagram.

SKILLS/ COMPETENCES/ EXPERTISE

Please take the positions that you mentioned in the above exercise. Correlate for each position the specific expertise that is needed and how much of this expertise is covered in reality.

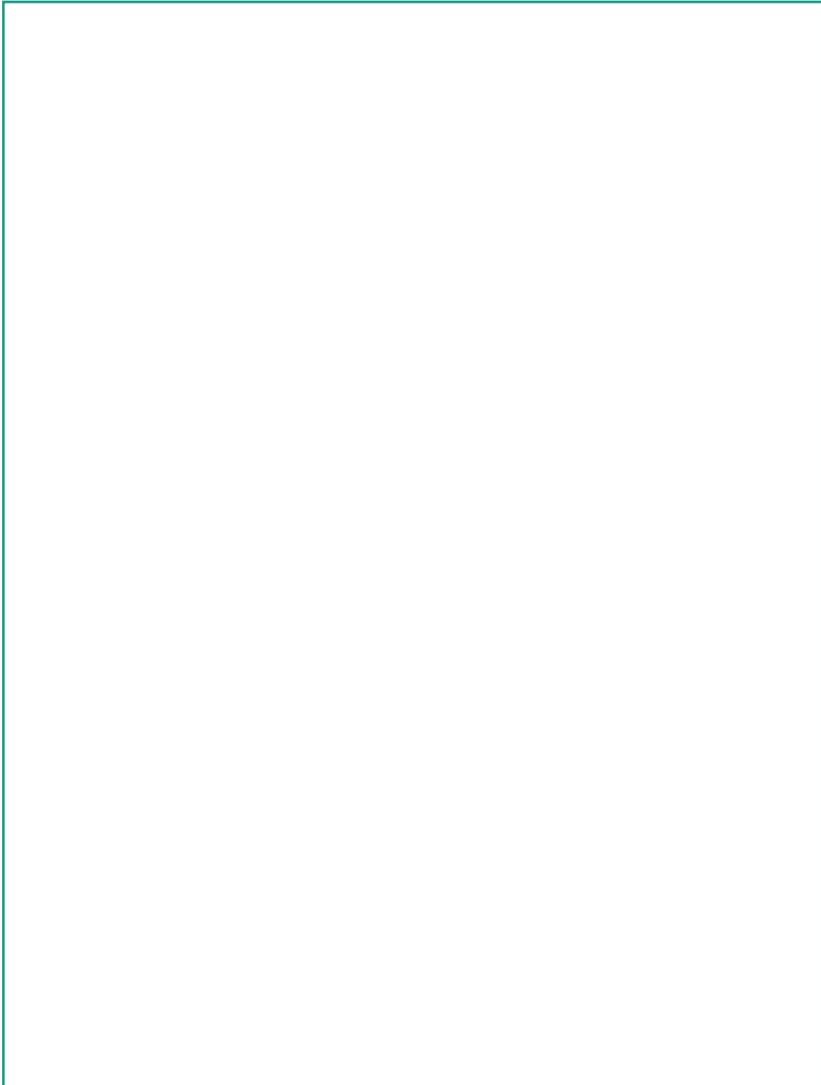
Position in the organisation	Expertise needed for the position	How much is it covered right now	What can be done to fully cover it (if not fully covered)

Additional questions to be addressed:

Are tasks covered? Need more people for specific tasks? Is it clear who is doing what/ who is responsible for what? Are tasks overlapping?

FUTURE VIEW

Recreate the structure of your organisation by writing/ drawing it as it was never done before. It should still be a functional system/ structure. Please also explain the reasons for changes that you did.

A large, empty rectangular box with a thin teal border, intended for the user to draw or write their future organizational structure and explain the reasons for changes.



LEADERSHIP

LEADERSHIP

DEFINITION

*“Leadership is about being better able to listen to the whole than anyone else can.”
(Hollender)*

WHY IS LEADERSHIP IMPORTANT?

- fills in the need to have agents of change in the organisation (and in society);
- provides motivation, guidance and builds a positive and efficient (work) environment;
- inspires people in the organisation to see the common goal and work together towards it;
- keeps track of the organisational vision and values and brings people closer to them;
- intervenes in different areas of behavior, such as conflict management, personal and professional development etc.

TYPES OF LEADERSHIP

Some say you are born with it. Others say it is a skill than can be learned. Nevertheless, leadership is a topic that will be always talked about. Numerous studies are undertaken, even more articles are written on the matter. We do need leaders, good ones. We do need people that take charge and empower others to get involved. Especially in the nongovernmental sector. And this can be done in more than one way. What type of leader are you?

“

Autocratic leaders make decisions without consulting their team members. This can be appropriate when you need to make decisions quickly or when team agreement isn't necessary for a successful outcome.

Democratic leaders make the final decisions, but they include team members in the decision-making process. They encourage creativity, and people are often highly engaged in projects and decisions.

Laissez-faire leaders give their team members a lot of freedom in how they do their work, and how they set their deadlines. They provide support with resources and advice if needed, but otherwise they don't get involved.

Transformational leaders have integrity and high emotional intelligence. They motivate people with a shared vision of the future, and they communicate well. They're also typically self-aware, authentic, empathetic, and humble.

Bureaucratic leaders follow rules rigorously, and ensure that their people follow procedures precisely. This is appropriate for work involving serious safety risks or with large sums of money.

Charismatic leadership resembles transformational leadership. The difference lies in their intent. Leaders who rely on charisma often focus on themselves and their own ambitions, and they may not want to change anything.

A “servant leader” is someone, regardless of level, who leads simply by meeting the needs of the team. The term sometimes describes a person without formal recognition as a leader. These people often lead by example. They have high integrity and lead with generosity.

”

Adapted from: Leadership Styles. Choosing the Right Approach for the Situation. MindTools

HOW TO MOTIVATE VOLUNTEERS?

One of the most important resources youth organisations have are volunteers. Whether we talk about long-term or short-term involvement in the organisation, no matter in which area/ department they are involved, most organisations simply forget to take care of this extremely important resource. Their motivation is essential to be kept high, as the activities that they carry out are important. Also, having in mind that they volunteer for a social/ humanitarian purpose, and not for direct benefits, most of the “classical” methods to motivate people are not sufficient. Hence we do need to think a bit out of the box.

“

1. Know their reasons for volunteering.

In order to keep your volunteers engaged and motivated, you need to first understand the reasons behind their decision to volunteer. Whether they do it to feel good about them, acquire new skills or just to make a difference, you're the one that needs to gather this information and apply it.

2. Communicate!

This is probably the easiest and most effective way of keeping up your volunteers' motivations. Good communication is key to managing the expectations and responsibilities of your people, but in order for it to really work you need to be able to listen, as well.

3. Show your appreciation.

Even though their volunteering comes from a real passion and good heart, your volunteers still want to be appreciated for what they do. If their efforts are not being recognized, they're more likely to ditch the cause and become less and less available.

4. Show them how they made a difference.

There's no better method of keeping up the motivation of your volunteers than by letting them see the results of their hard work. For instance, seeing a child who after months of tutoring is finally able to read a whole book out loud is a sight no volunteer will ever forget.

5. Provide social recognition.

Volunteers can have their work recognized not only internally, but externally as well. You can use social media to your advantage – for example, post a photo depicting volunteers in action on your organisation's Facebook wall.

”

Adapted from: Tishman, Shari. 5 Ways to Motivate Your Nonprofit's Volunteers. VolunteerMatch, February 10, 2015.



LEADERSHIP

ORGANISATIONAL DEVELOPMENT INSTRUMENTS

MANAGER VERSUS LEADER

Please select from the following statements what a manager and what a leader should do. It is recommended to do this exercise in a group. Please mind that there are no correct answers, thus try to see what fits best to you understanding of the two terms.

Statement	Manager	Leader
Monitors feelings and morale		
Schedules work		
Evaluates progress of the activities		
Checks task completion		
Is a good role model		
Monitors progress of the activities		
Delegates tasks		
Provides development opportunities		
Follows systems and procedures		
Guides progress of people		
Provides feedback on performance		
Builds teams		
Shares the vision with the people		

Statement	Manager	Leader
Creates an organisational 'culture'		
Plans/ prioritizes tasks of people		
Explains goals, plans and roles		
Ensures effective induction of people		
Gives orders and instructions		
Takes decisions		
Looks 'over the horizon'		
Uses analytical data to take decisions		
Co-ordinates resources		
Motivates staff		
Takes risks		
Uses analytical data to forecast trends		
Acts as interface between team and others		
Ensures predictability		
Creates a positive team feeling		
Unleashes team potential		
Provides focus for the team		
Inspires people		

CONCLUSIONS

How does this exercise apply to your organisation? Do you have an appropriate mix of leadership and management? If not, how can you enhance this?

LEADERSHIP SKILLS

Please write some general description of how the leaders of the organisation are and how they should become (what additional skills they need):

Skills that leaders in the organisation already have	Skills that leaders in the organisation need to develop	How it will be acquired/ through what activity

NEW LEADERS

Please think about and write in the table below what measures could be taken to actively search for leader within and outside of the organisation.

Measure/ Activity to be undertaken	How to implement the measure	Who is responsible?
Give members/ staff/ volunteers the possibility to take on leadership roles in small projects	Nominate different leaders for different projects; provide guidance, mentoring and feedback; have regular meetings and monitor their performance.	Leader(s) of the organisation/ Project managers



HUMAN RESOURCE MANAGEMENT

HUMAN RESOURCE MANAGEMENT

DEFINITION

“Human resource management is concerned with the people dimension in management. Since every organisation is made up of people, acquiring their services, developing their skills, motivating them to higher levels of performance and ensuring that they continue to maintain their commitment to the organisation is essential to achieve organisational objectives”. (Decenzo and Robbins, 2005)

WHY ARE HUMAN RESOURCES IMPORTANT?

- *involves all the people in the organisation, putting together members/ staff/ volunteers;*
- *optimizes the expertise and experience of the people inside the organisation towards common goals (mission);*
- *helps the organisation to move forward by creating and implementing practices to better the work of people;*
- *ensures ownership over the vision and mission of the organisation in an operational manner;*
- *everybody is treated in the same manner and the needs of the organisation are balanced with the needs of the members/ staff/ volunteer.*

EXAMPLES ON TYPES OF ASSISTANCE, besides training:

Coaching is used to enhance or improve competencies through (self) reflection. A coach provides guidance, not direct solutions to problems/ issues.

Mentoring is designed to directly support people. A mentor provides help and advice.

Shadowing enables people to observe a more experienced member in his/ her practice. It is designed to share best practices, see new things or observe a new way of doing things



HUMAN RESOURCES MANAGEMENT

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

RECRUITMENT PRACTICES

Please consider the below statements and fill in the template as to create a small procedure/ practice for recruitment of members/ staff/ volunteers inside your organisation:

Steps to consider in recruitment	Observations
Is there a specific need for a position inside the organisation? What is the need?	
Do you need staff/ a paid person or volunteer? Do you need a new member?	
Do you have the appropriate person already in the organisation? Can you find it outside the organisation?	
Job/ position description – what will be the tasks and responsibilities of the position?	
What resources are there inside the organisation for the position?	
What is the timeframe for the selection stages?	
Will you search and review resumes from your database or make an open call?	
Do you need to have an interview (live or online)? What questions will you ask?	
Final observation after the decision has been made:	

INDUCTION

List the things new people need to know about the organisation.

IDEAS FOR INDUCTION

Please have the idea list below and complete it with your own ideas for activities to welcome new members/ staff/ volunteers in the organisation

Before the new member/ staff/ volunteer starts - send out to them useful information about the organisation - provide a package that includes: vision and mission, strategic plan/ objectives, organisational structure and contacts, main activities, last annual report, etc.

First day - show them around, introducing them to everybody; deal only with important documents and tasks and do not make day 1 overwhelming.

First week - explain who's who, how the organisation works, its rules and culture, how any facilities work, start thinking of the personal/ professional development plan.

ASSISTANCE AND DEVELOPMENT PRACTICES

Please use and modify according to your needs the following personal/ professional development plan:

What competence do I need to acquire/ develop?	
What activities do I need to undertake in order to acquire/ develop the competence?	
How will I know I acquired/ developed the competence?	
What is the time I need for it to happen?	
What resources do I need for it to happen?	

RECOGNITION OF WORK

Please think and write ideas to reward and recognize the work of members/ staff/ volunteers involved in the organisation

- *Diplomas*

- *Certificates*

- *Letters of support*

- *Inclusion of members/ staff/ volunteers in the annual report*

-

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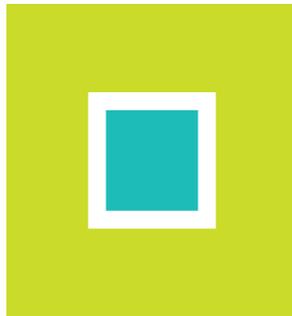
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GENDER CHECKLIST

Please read the items from the list below and answer YES or NO based on what applies to your organisation. If some of the items are answered with NO, you can consider improving them in the future:

	YES	NO
Is there a good balance in the decision-making/ management process within the organisation among male/ female/ non-binary members? (50% - 50% or at least 40% - 60%)		
Is gender equality encountered as a transversal principle in the mission, strategy, and intern policies of the organisation?		
Is there gender expertise within the organisation or does the organisation use the expertise from relevant organisations it collaborates with?		
Do you perform a gender impact monitoring and assessment at the organisational level? Or inside different projects implemented?		
Do you adapt the environment, working conditions and the organisational culture to the different needs from the team?		
In your activity are you aware of the differences and the specific needs of the male/ female/ non-binary beneficiaries?		
When you draft a project proposal, do you take into account the gender impact over beneficiaries and communities?		
Do you conform to the principle "Nothing for women without women"?		

Adapted from the gender equality instrument developed in the NGO Fund in Romania under the EEA Financial Mechanism 2009-2014 (<http://fondong.fdsc.ro>)



BENEFICIARY INVOLVEMENT (young people with fewer opportunities)

BENEFICIARY INVOLVEMENT (young people with fewer opportunities)

DEFINITION

The European Commission, based on its Inclusion and Diversity Strategy in the field of youth, provided the following categories as guidance when working with young people with fewer opportunities:

- **Social obstacles** - young people facing discrimination because of gender, ethnicity, religion, sexual orientation, disability, etc.; young people with limited social skills or anti-social or risky sexual behaviours; young people in a precarious situation; (ex)offenders, (ex)drug or alcohol abusers; young and/or single parents; orphans, young people from broken families.
- **Economic obstacles** - young people with a low standard of living, low income, dependence on social welfare system; in long-term unemployment or poverty; young people who are homeless, young people in debt or with financial problems.
- **Disability** - mental (intellectual, cognitive, learning), physical, sensory, other disabilities.
- **Educational difficulties** - young people with learning difficulties, early school-leavers and school dropouts, lower qualified persons, young people with poor school performance.
- **Cultural differences** - young immigrants or refugees or descendants from immigrant or refugee families; young people belonging to a national or ethnic minority, young people with linguistic adaptation and cultural inclusion problems.
- **Health problems** - young people with chronic health problems, severe illnesses or psychiatric conditions, young people with mental health problems.
- **Geographical obstacles** - young people from remote or rural areas, young people living on small islands or peripheral regions, young people from urban problem zone, young people from less serviced areas (limited public transport, poor facilities, abandoned villages).

(Erasmus+ Inclusion and Diversity Strategy in the field of youth 2014. http://ec.europa.eu/assets/eac/youth/library/reports/inclusion-diversity-strategy_en.pdf)

WHY IS IT IMPORTANT TO INVOLVE young people with fewer opportunities?

- provides ownership over the activities that young people are involved making them proactive and motivating them to further participate in the life of the organisation;
- increases the possibility that young people become more engaged in their everyday lives at a personal level;
- empowers young people to become more active in their communities;
- enhances their competencies and increases their inclusion in different aspects of society;
- sets a framework in which young people themselves will potentially run the organisation in the future, making thus a shift in the structure/ composition.

METHODS TO IDENTIFY the inclusion needs of young people

We think we already know what the inclusion need of our beneficiaries are. We have worked with them so for sure we know this. But do we really know all needs? Have we ever made an assessment from which to better understand their real lives, real struggles, real dreams? If not, maybe it is the time to do it, following some simple methods.

“

Direct Observation - It involves counting, noting behavior and expression, and otherwise registering notable facets of a particular developmental situation.

Conversational Interviews - Basic tools of inquiry for the practitioner of beneficiary assessment. The conversational interview is structured around a number of themes or topics directly related to young people.

Participant Observation - Is the protracted residence of an outsider in a community of beneficiaries during which sufficient rapport is established and involvement in their everyday activities occurs to allow for the kind of representation of their living conditions.

”

Adapted from: Salmen, Lawrence F. Beneficiary assessment an approach described. World Bank, Social Development, paper number 10, August, 2002.



BENEFICIARY INVOLVEMENT

**ORGANISATIONAL DEVELOPMENT
INSTRUMENTS**

QUESTIONS FOR INTERVIEWS/ FOCUS GROUPS

Add more/ less based on your personal knowledge of the community/ young people

■ *What is happening in your community that shouldn't be happening?*

■ *For how long has this been a problem/ issue?*

■ *Where does it occur?*

■ *What would indicate to you that the problem is solved?*

■ *What would you do to solve it?*

■ *How do you feel about your future? How do you see, hear, smell it?*

■ *What is the most positive version that you can think related to how your future looks like?*

■ *What knowledge, skills, or behaviours do you need to get/ have in order to get to this positive future? What are you willing to do to get them?*

■

■

■

■

INVOLVEMENT IN THE ORGANISATION

Please think in which area of the organisation are the young people/ beneficiaries directly involved and write in the template below what they actually do on each project/ programme and each area?

Project/ programme (name)	Strategic/ management	Logistic/ administrative	Accounting/ financial	Departments/ activities

Based on the previous exercise, where do you consider important to involve more the young beneficiaries and how do you think it will be in yours and their benefit?

Ideas to involve more young people with fewer opportunities into the daily life of the organisation – please continue the brainstorming, also asking the beneficiaries themselves:

Ideas from members/ staff/ volunteers of the organisation:

- Get them involved in the governance body of the organisation, ask them to organize events (in the community, for other young people), let them do fundraising for the organisation, ask them to identify inclusion needs for other young people (e.g. conduct interviews), let them identify and pursue an advocacy issue in the community (that affects them directly)...
-
-
-
-

Ideas from beneficiaries:

-
-
-
-
-
-



ADVOCACY

ADVOCACY

DEFINITION

"A systematic and strategic approach to influencing governmental and institutional policy and practice change". (Ross, 2013)

WHY IS ADVOCACY IMPORTANT?

- enhances changes in policy implementation that can positively affect young people with fewer opportunities;
- increases awareness of different issues in the community and among beneficiaries;
- creates the practice inside the organisation to become more proactive towards its goals;
- provides links and partnerships with other organisations and/ or institutions that can become more effective together;
- improves wider connections to different stakeholders but also decision-makers at different levels.

HOW CAN COALITIONS BE FORMED?

When forming coalitions, there is always an issue/challenge that gathers together actors affected or influenced by the respective problem. During its existence, an organisation may decide to join ad-hoc coalitions or networks (on specific issues, with specific target groups and within a limited period of time) or can be part of (formal) coalitions that grow around larger issues and with longer term targets. Anyhow, the lifecycle of a coalition formation and existence would imply different stages and for each of them the organisation needs to assess its own abilities and resources available to significantly contribute.

“

Key stages in coalition formation

1. *Issue Identification and Specification: the overall objective of the problem is articulated and broken down for detailed analysis; policy options are defined in terms of a continuum of options (from minimum to maximum reform positions) that particular stakeholders may support.*
2. *Relationship/Stakeholder Mapping: significant actors are identified; positions toward key and related issues are plotted, especially in terms of the policy options identified in the previous step.*
3. *Forming Core Membership: the core of a coalition is convinced about and becomes self-aware of the benefits of change; core actors are organized, early leaders and champions are identified, and the joint agenda takes shape.*
4. *Demonstrating Credibility: coalition demonstrates it is knowledgeable about relevant issues, can act effectively, and is worthy of support from stakeholders.*
5. *Purposeful Expansion: a critical stage when a small organisation builds a broader social and resource base while retaining coherence and effectiveness.*
6. *Sustainable Transformation: during which the coalition has grown and becomes polycentric, with initiatives on many fronts, drawing strength from many sources.*

”

Adapted from: Coalition building. Communication for governance & Accountability Program. The World Bank, 2010



ADVOCACY

ORGANISATIONAL DEVELOPMENT INSTRUMENTS

ADVOCACY PLAN

Please consider the steps below in order to start your advocacy plan:

IDENTIFY THE PROBLEM AND SET THE SOLUTION:

What is the overall biggest issue of the organisation`s beneficiaries?

(e.g. participation of young people in public life)

Think about the issue, write problems connected to the overall issue and try to determine for each problem the cause(s), effect(s) and, most important, possible solutions:

Problem	Cause	Effect	Solution
e.g. lack of information			

Questions to verify the information above:

1. Is the problem real? Can it be backed-up by concrete evidence (Statistics, literature review, etc.)? Are the causes and effects correctly identified? (Try to get feedback from other persons from the organisation or from stakeholders)
2. Is the solution realistic? Is the solution achievable?
3. Will decision-makers endorse/ support the solution?

Choose the problem/ solution that answer YES to all questions above and set a realistic and comprehensive goal for the advocacy intervention (for instance getting the solution into a public policy at local level):

IDENTIFY MAIN STAKEHOLDERS:

	Stakeholder 1 (e.g. Ministry)	Stakeholder 2 (e.g. Community leader)	Stakeholder 3 (e.g. Political party)	Stakeholder 4 (e.g. Local authority)
Stakeholder name				
What is the stakeholder's interest in the problem/solution? (low, medium, high)				
What is the stakeholder's influence over the problem/solution? (low, medium, high)				
What is the stakeholder's importance in engaging the problem/solution? (low, medium, high)				

Adapted from: https://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf

Which of the stakeholders have the highest interest, influence and importance?

Which of the stakeholders can help in an advocacy intervention?

Which of the stakeholders listed above can oppose your advocacy intervention?

IDENTIFY KEY MESSAGE:

Construct a core message for your advocacy topic that includes a statement of the problem and solution proposed, evidence – statistics and information and an example – focuses on the affected.

PLAN AND MONITOR YOUR INTERVENTION

Activity	Outcome	Output	Target audience	Timeframe	How you monitor?	How you evaluate?	Resources needed

ADVOCACY SKILLS

Thinking about the advocacy intervention you want to focus on, please complete the following table:

What competencies do you have in the organisation related to advocacy? (e.g. needs of the beneficiaries, management, etc.)	What skills does the organisation need to further develop advocacy interventions? (e.g. juridical, etc.)	How could the organisation get the needed competencies? (e.g. training of staff, hiring an advocacy expert, etc.)



EXTERNAL COMMUNICATION

EXTERNAL COMMUNICATION

DEFINITION

Organisational communication

“Organisational communication is the exchange of information, ideas, and views (within and) outside the organisation. Every organisation has specific goals and stakeholders. Attainment of those goals depends on successful communication with the respective stakeholder groups. Therefore, communication is considered as the part and parcel of any organisation.” (The business Communication)

Organisational branding

“A brand is the essence of one’s own unique story. This is as true for personal branding as it is for organisation branding. The key, though, is reaching down and pulling out the authentic, unique “you”. Otherwise, your brand will just be a facade.” (Paul Biedermann)

WHY ARE COMMUNICATION and branding important?

- the organisation becomes accountable and transparent, shaping its image in the community;
- the organisation gets information over the context in which the organisation works;
- increases chances for additional/ more resources;
- promotes recognition for the organisation and people can feel more at ease with its activities;
- adds value to the organisation, beyond physical assets.

TIPS TO BUILD YOUR ORGANISATION'S BRAND

When we hear branding we first think of something complicated and not useful for NGOs. Or too fancy for us. The truth is there's nothing as complicated or as fancy as we might think. Branding involves some quite basic ideas to better pinpoint your organisation in the minds of your stakeholders and to set you apart in a positive way. With simple instructions any organisation can have a brand and communicate this brand to the larger audiences.

“

Start with a Solid Foundation

To build a successful and authentic brand, you have to start with your values. The things valued as part of your organisation's culture will help to shape the best brand for you.

Articulate Your Message

The secret to successfully communicating your brand to audiences is knowing what you want to say, and articulating that message so nobody can be confused.

Build a Tagline AND Positioning Statement

A tagline's purpose is to give the consumer a reason to "buy". In the NGO world that could mean giving people a reason to get engaged with your organisation. The positioning statement is supposed to set you apart. Ask yourself "Why would people support us?". Once you have both, you have what you need to form your value proposition.

”

*Adapted from: Heineman, Austin.
Tips and Tools to Build Your Organisation's Brand.
The nonprofit hub.*



EXTERNAL COMMUNICATION

ORGANISATIONAL DEVELOPMENT
INSTRUMENTS

COMMUNICATION PLAN

Please use this template to answer each question, so that you might have an outline of your communication plan. This template can be used both for the general plan of the organisation but also for specific projects/ programmes.

<p>Objective(s) Why do you communicate? No need to have SMART objective(s), but comprehensive.</p>	
<p>Target audience Whom you want to communicate to? It is good to have a separate plan for different target audience or to have in mind specific actions for different stakeholders.</p>	
<p>Key message What do you want to communicate? Write the essential message you want to transmit.</p>	
<p>Communication channels How/ where do you want to communicate? Write the channels that are most likely to be used (do not put for instance TV if you know this is impossible to be achieved).</p>	
<p>Communication activities What should you do in order to use the channels mentioned above? Put all activities into a monthly graphic.</p>	
<p>Budget (if needed) What is the budget for different activities? Add for each activity a specific budget.</p>	
<p>Monitoring and evaluation What are the key qualitative and quantitative indicators (for each activity or for the overall plan)? Who is in charge of monitoring the plan?</p>	

BRANDING STATEMENT

Please do this exercise preferably with more people from the organisation.

1. Fill in each space with a word/ short sentence that describes your organisation:

2. Now select only the top 3 words/ short sentence that best describe your organisation:

3. Now put all the above selected words in a sentence that makes sense (is clear) and can act as a statement for your organisation:

This could be the start of your brand statement!
Modify it, present it to other people, and get their feedback on it.

COMMUNICATION CHANNELS

Please see the table below and fill it in. Add rows and other channels if needed.

Communication external channel	% of usage (out of the total communications)	Frequency of usage (e.g. daily, monthly, etc.)	Type of information transmitted	How it can be improved (if needed)
Face-to-face				
TV				
Radio				
Written press (magazines, papers, etc.)				
E-mail				
Facebook				
Twitter				
Website				
Blog				
Instagram				
Pinterest				
LinkedIn				
EU portals (e.g. Eurodesk)				

ACCOUNTABILITY AND TRANSPARENCY

Please tick the boxes below as the practices in your organisation are into place

	We have	We do not have
Regular reporting (through any channels) to stakeholders and community on results		
Organisation has a website/ web page/ Facebook page where it posts aspects related to its activity		
Information publicly available on the organisation policies, strategies and operational activities (including parts of the strategic plan)		
Annual report published including financial information of the organisation		
The organisation has publicly available information on member selection processes, criteria		
The organisation has publicly available information on current members/ board members/ staff (with names/ position, contact information)		
The organisation publishes information related to financed projects, including financial overview of expenditures		

What else you can add into your communication practices so that the organisation can be more accountable to stakeholders?

8. ANNEX 1

Section dedicated on how to do strategic planning

“A goal without a plan is just a wish” - Antoine de Saint-Exupery

Strategic planning is an organisational activity undertaken to set priorities, focus energy and resources, strengthen processes, ensure that members/ staff/ volunteers and other stakeholders are working toward common goals, establish agreement around intended outcomes/ results, and assess and adjust the organisation’s direction in response to a changing environment.

Steps for a sound strategic planning:

1. Set the basis – define the process, the budget, responsible person(s)

Define the process: What is the simplest and most realistic way in which you can make the strategic planning? What will be the concrete steps? What will be the timeframe and resources proposed?

Define the budget: What is the budget you can allocate to the process? What are the specific budgetary items that could be included? (e.g. fee for external facilitator, costs for staff retreat, etc.)

Define the responsible person(s): Who is going to be in charge of the strategic planning process?

2. Define the context

- a. *PESTEL analysis* - In order to conduct any strategic work, it is necessary to reach a common understanding, or agreement, about what is happening in the environment in which you work. A PESTEL analysis is a tool used to analyse and monitor the macro-environmental (external environment) factors that have an impact on an organisation. Please use the template below and fill it in.

<p>Political Factors - political stability or instability, laws, conservative or progressive developments, easier or harder to work with governments/ public institutions, more or less support for social causes, etc.</p>	
<p>Economic Factors - changes in economic structures, changes in income and wealth, changes in labour participation, exchange rates, economic growth or downturn, more or less money available for NGOs projects and programmes, better or less chance with public or other donors, etc.</p>	
<p>Social/cultural Factors - population growth, age distribution, health consciousness, career attitudes, increasing or decreasing diversity, immigration or emigration, changes in family structure, changes in lifestyle, changing gender roles, education systems changing, changes in media use, etc.</p>	
<p>Technological Factors - internet development, social media importance, spreading of fake news and/ or hate speech, developments in robot technology and artificial intelligence, etc.</p>	
<p>Environmental Factors - climate change, changes in water/air /life quality affect different groups differently, food prices change, energy prices change, etc.</p>	
<p>Legal Factors - changes in legislation affecting beneficiaries, bureaucracy, laws and policies change, etc.</p>	

- b. *SWOT analysis* - The result of the PESTEL analysis can be further used to identify threats and weaknesses in a SWOT analysis. Please use the template below and fill it in.

<p>Strengths (Internal factor / Positive influence) What are we good/ best at? What specific skills do we have? What financial resources do we have? What connections do we have?</p>	<p>Weaknesses (Internal factor / Negative influence) What are we not so good at doing? What do we lack? What is our financial position? What connections should we have, but don't?</p>
<p>Opportunities (External factor / Positive influence) What changes in the external environment can we exploit? What weaknesses in our competitors can we use to our advantage? What new technology might become available to us? What new markets might be opening to us?</p>	<p>Threats (External factors / Negative influence) What might our competitors be able to do to hurt us? What new legislation might damage our interests? What social changes might threaten us? How will the economic cycle affect us?</p>

Adapted from Marketing Theories – Swot Analysis,
<https://www.professionalacademy.com/blogs-and-advice/marketing-theories---swot-analysis>

- c. *Stakeholder review.* In order to have a realistic overview of the development of the organisation it is important to ask the stakeholder opinion. For this there can be carried out interviews, focus groups, sending out questionnaires. Some questions that can be included in these instruments are:

Can you describe your relationship with the organisation, if any?

What do you know about the organisation and its activities?

Can you point some of the organisations achievements?
Does something need to be improved?

Can you identify any threats for the organisation?

What would happen if the organisation would not exist?

Do you have anything else that you would like to add?

3. Review the vision and mission

EXERCISE VISION

Step 1:

Take a few minutes to answer the questions: “What do we dream of becoming if all resources would be available? How do we want the world to be?”

Step 2:

Discuss/ share the answers inside your organisation and take out the key words that are common to more people

Step 3:

Write a statement from the key words

EXERCISE MISSION

Step 1:

Take a few minutes to answer the following questions: “What are we doing (actions)? For whom are we doing the action? Why are we doing the actions?”

Step 2:

Discuss/ share the answers inside your organisation and take out the key words that are common to more people

Step 3:

Write a statement from the key words

Please fill in the following table, based on the previous exercises:

	Current	(possible) New
Vision statement		
Mission statement		

EXERCISE VALUES

1. Ask a list of five to seven core values from each of your members/ staff/ volunteers.
2. Merge the lists by combining values that are listed more than once.
3. Bring the group together to discuss the list of values.
4. Revise and modify until you have generated a final list of value statements.
5. After you have your list of organisational values, put the finishing touches on the statements and communicate it inside and outside the organisation.

What are your organisation values?

To keep in mind:

- Create phrases, not just single words.
- Make the values specific.
- Communicate/ share the values within and outside the organisation.
- Keep the list of values between three and five.

4. Establishing strategic priorities

Based on the general assessment, what are the strategic priorities for the organisation?

5. Write strategic objectives

What are the strategic objectives? Please formulate at least one objective per each priority. The strategic objectives do not need to be SMART!

6. Operationalize

Please fill in the following template for the strategic plan:

	Strategic priorities	Strategic objectives	Activities	Outcomes	Outputs	How do we monitor	Resources	Person in charge/ Team
1								
2								

For a better use of the instrument, please visit www.odyotoolkit.eu

9. RESOURCES AND REFERENCES

RESOURCES:

Use the Community Tool Box to get help taking action, teaching, and training others in organizing for community development. Dive in to find help assessing community needs and resources, addressing social determinants of health, engaging stakeholders, action planning, building leadership, improving cultural competency, planning an evaluation, and sustaining your efforts over time.

<http://ctb.ku.edu/en>

The World Association of Non-Governmental Organisations (WANGO) is an international organisation uniting NGOs worldwide in the cause of advancing peace and global well-being. WANGO helps to provide the mechanism and support needed for NGOs to connect, partner, share, inspire, and multiply their contributions to solve humanity's basic problems.

<http://www.wango.org/>

SALTO-YOUTH is a network of eight Resource Centres working on European priority areas within the youth field. As part of the European Commission's Training Strategy, SALTO-YOUTH provides non-formal learning resources for youth workers and youth leaders and organises training and contact-making activities to support organisations and National Agencies (NAs) within the frame of the European Commission's Erasmus+ Youth programme and beyond.

<https://www.salto-youth.net/>

The training kits produced by the EU - Council of Europe youth partnership, are thematic publications written by experienced youth trainers. They are easy-to-use handbooks for use in training and study sessions.

<http://pjp-eu.coe.int/en/web/youth-partnership/t-kits>

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