SHAPING
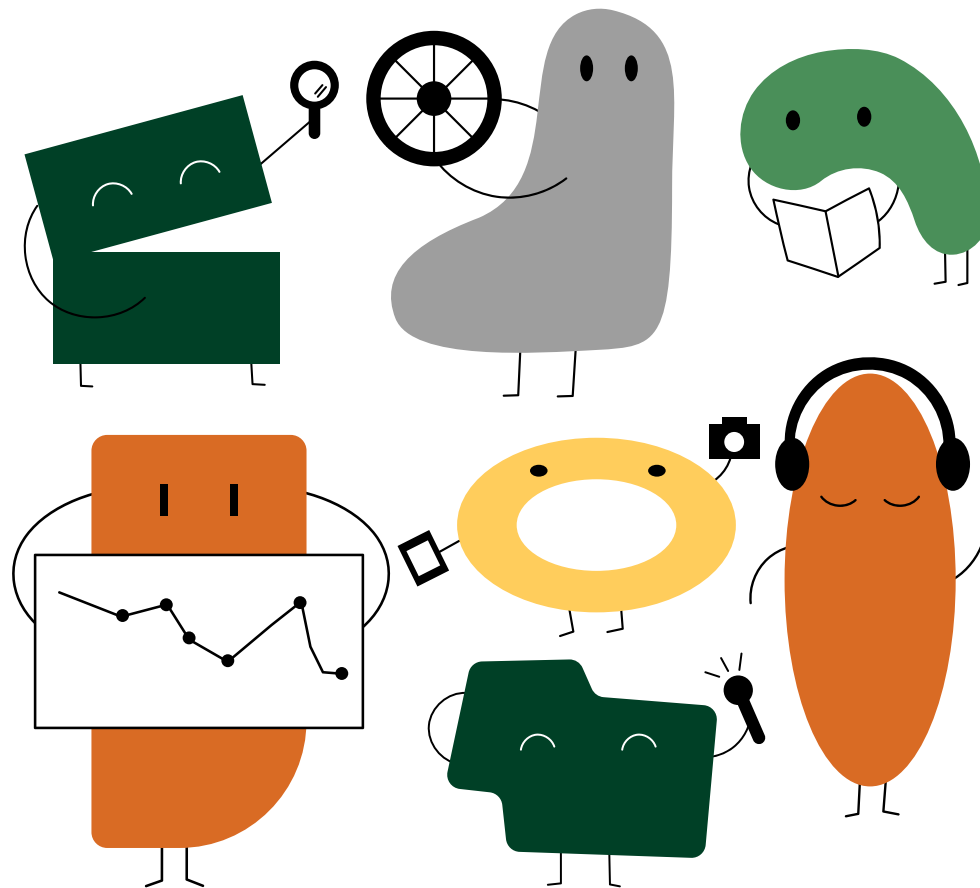## inclusion
diversity &

A practical guide to creating inclusion and diversity strategy for National Agencies

SALTO YOUTH stands for...

...'**S**upport and **A**dvanced **L**earning and **T**raining **O**pportunities within the Erasmus+: Youth in Action and European Solidarity Corps programmes'. The European Commission has created a network of seven SALTO-YOUTH Resource Centres to enhance the implementation of the EU Erasmus+: Youth in Action and European Solidarity Corps programmes, which provide young people with valuable non-formal learning experiences.

SALTO's **aim is to support the implementation of the European Erasmus+: Youth in Action** and **European Solidarity Corps Programmes** with regard to priorities such as Social Inclusion, Diversity, Participation and Solidarity. SALTO also supports co-operation with regions such as EuroMed, South-East Europe or Eastern Europe and The Caucasus and co-ordinates all training and co-operation activities, as well as information tools for National Agencies.

In these European priority areas, SALTO-YOUTH provides **resources, information and training** for National Agencies and European youth workers. Most of these resources are offered and disseminated at www.SALTO-YOUTH.net. Find online the European Training Calendar, the Toolbox for Training and Youth Work, the database of youth field trainers active at European level (Trainers Online for Youth or TOY), links to online resources and much more.

SALTO-YOUTH actively **co-operates** with other actors in the European youth field, among them the National Agencies of the Erasmus+ and European Solidarity Corps programmes, the Council of Europe, the European Youth Forum, European youth workers and trainers and training organisers.

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

The SALTO-YOUTH Inclusion and Diversity Resource Centre (based in Belgium Flanders) works together with the European Commission to support the inclusion of **young people with fewer opportunities** in the Erasmus+: Youth in Action and European Solidarity Corps programmes. Through that, it works to contribute to social cohesion in society at large. SALTO Inclusion and Diversity also supports the National Agencies and youth workers in their inclusion work by providing training, developing youth work methods, disseminating information via the newsletter, etc. By offering opportunities for training, exchange and reflection on inclusion practice and diversity management, SALTO Inclusion & Diversity works towards the visibility, accessibility and transparency of its inclusion & diversity work and resources, and towards making 'inclusion of young people with fewer opportunities' and 'positive diversity management' a widely supported priority.

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

TABLE OF CONTENTS

NOTE

This publication is accompanied by the Shaping Inclusion and Diversity Podcast. Throughout the document, you will find links that take you directly to the 7 episodes.

Please note that the podcast is complementary to this document. Whilst both the publication and the podcast can be enjoyed on their own, we recommend interacting with the topic through both forms.

INTRODUCTION

Elin is 18 when she leaves Turkey for the first time. She boards the plane all by herself and arrives in Finland, hearing the unfamiliar sound of the Finnish language in her ears. She will spend 6 months in Korsnäs, little does she know about this place. She mostly knows that it is much smaller than her home city of Ankara.

The voices of Jenni and Aarni who pick her up at the airport sound nice - although Elin does not understand a lot of what they say. Arriving in Korsnäs, Elin does not quite believe it: no honking of cars, no smells of restaurants and traffic, just the sound of trees and a smell of the ocean. And then there is the cold. Elin struggles to explain to her family back home how it feels.

Fast forward 9 months. Elin's time working as a European Solidarity Corps volunteer at the local museum is coming to an end. Besides Finnish history, she has learned so much in Korsnäs. Elin now knows she wants to become a history teacher. There is nowhere a blind person like me cannot go, if I can go to Korsnäs.

More than 10 million people[1] like Elin have benefited from EU programmes in the field of education, training, youth and sport between 1987 and 2020. In 2014-2017, the proportion of people with fewer opportunities accounted, on average, for 11.5% of the

[1]European Commission: Implementation guidelines - Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy. Available here: www.salto-youth.net/inclusionstrategy/

total number of participants[2]. Youth projects involved a higher number of people with fewer opportunities, reaching up to 30%. Despite these numbers regarding the Erasmus+ programme offering much better results in inclusion than its predecessors, there is still a lot of work to do.

Demographic changes and migration waves have prompted an even bigger need for Erasmus+ and European Solidarity Corps programmes to foster understanding of differences and reduce conflict and prejudice. For that to happen, these programmes need to be able to reach and connect the true diversity present across Europe.

Erasmus+ will be more inclusive, more digital, and more green.

The 2021-2027 programme places a strong focus on social inclusion, the green and digital transitions, and promoting young people's participation in democratic life. A key player in translating that need into action are the National Agencies. They can strategically promote inclusive practises and streamline inclusion and diversity into all their actions.

National Agencies are expected to have an inclusion strategy or work plan aligned with the <u>Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy</u>.

---

[2]Report from the Commission [COM(2018)50] to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on the Mid-term evaluation of the Erasmus+ programme (2014-2020), page 2, as quoted in Implementation guidelines, see footnote n° 1.

For this purpose, <u>SALTO Inclusion & Diversity Resource Centre</u> decided to update this publication, originally published in 2007. "Shaping Inclusion and Diversity" aims at simplifying the theory behind strategy development in order to make it more accessible to a wider audience. At the same time, the e-booklet presents examples of how National Agencies have put strategic theory into practice specifically in the field of inclusion.

In this way, SALTO Inclusion & Diversity hopes to support National Agencies and especially inclusion and diversity officers in their task of creating and implementing national inclusion and diversity strategies.

National Agencies are different from many other non-profit institutions. The profile of a National Agency inclusion and diversity officer is multi-faceted (programme implementer, financial manager, advisor and disseminator) and the work they are asked to do is sometimes complex.

These and other factors all need to be brought into balance if National Agencies inclusion and diversity officers are to do their work effectively. One way to find this balance is to encourage more strategic thinking within National Agencies. However, simply promoting the concept of strategy is not enough. Inclusion and diversity officers need advice and strategic tools which take their specialised role into account.

TIPS

Be optimistic about this strategy process. Developing a strategy can be a very motivating process (yes, really!). It can provide you or your organisation with solid facts which you can then use to chart the future direction of your work. Having a clear strategy can help shake an organisation out of its tired daily routine and provide it with a new set of objectives to strive for.

A strategy can give your co-workers the feeling that they are doing more than just "going through the motions" and instead make them part of a motivated team working together towards making your programmes more and more inclusive.

Who is this booklet for

This publication is for everyone working at National Agencies , and more specifically for inclusion and diversity officers and members of inclusion working groups. A strategic mindset is crucial to implement holistic and cross-sectorial inclusion strategies. They require new working methods and deepened relationships with key stakeholders. This is a complex process which will not just happen on its own. The inclusion and diversity officers should to take time to understand the demands of the new programmes and to plan how they can best meet those demands. In short, strategies are not a "nice-to-have" but a "must-have".

This booklet is directed primarily at "newcomers" to strategy. It will examine the basic concepts behind strategy development and present them in a user-friendly way. By doing so, we hope to make strategic thinking more attractive and accessible and demonstrate how strategies can be developed in any context.

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

How to use it

Use the publication how it best fits your needs: as a step-by-step approach to follow or as a resource to consult on specific elements of the strategy building process.

Throughout the publication, you can access the Shaping Inclusion and Diversity Podcast that highlights the concepts, connects you with first-hand experience and guides you through the process of creating a Inclusion and Diversity Strategy.
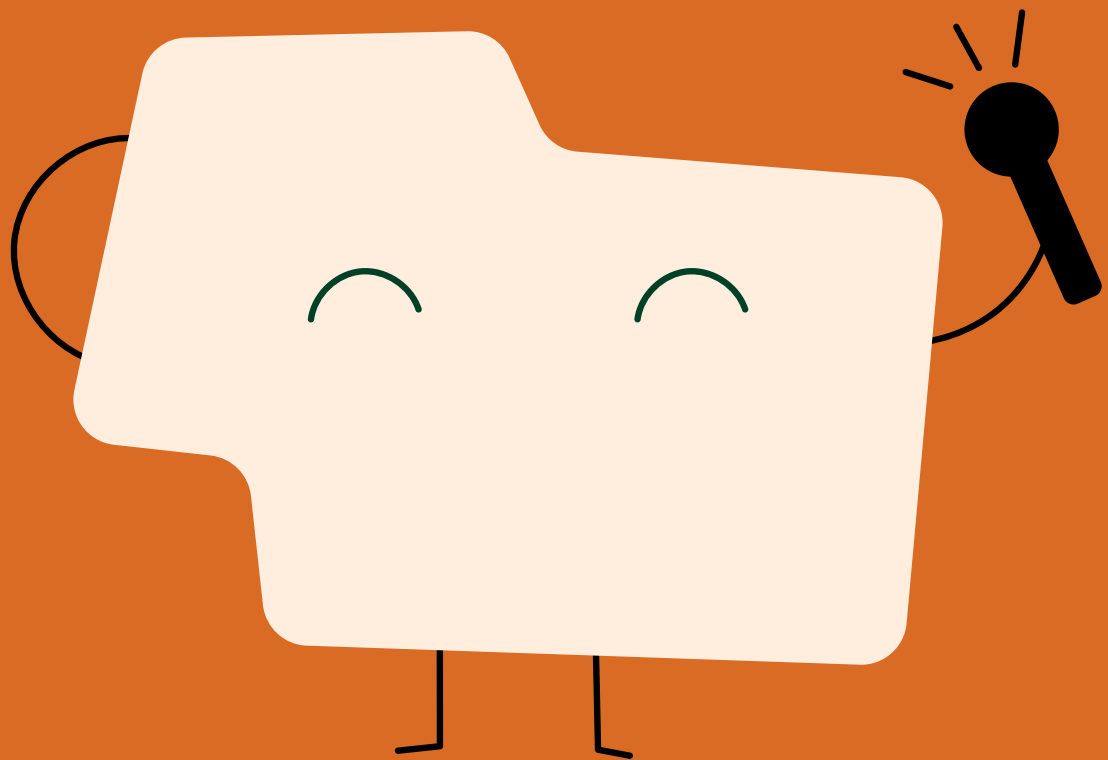
WHAT IS STRATEGY

Listen to Episode 1 of the "Shaping Inclusion and Diversity Podcast" to start making yourself familiar with strategic thinking.

Strategy is difficult to define. Different books dealing with strategy often have their own unique definition. In simple terms, a strategic plan creates a bridge between today's goals and tomorrow's reality[3]. Let's break that down into smaller pieces:

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

That doesn't sound so bad, does it? In fact, we make mini-strategies in our heads throughout the day without even knowing it. If you have ever painted your house, organised a big party, or de-

---

[3]Andrews, Kenneth. The Concept of Corporate Strategy, 1987

cided to change jobs, you almost certainly had to think strategically.

The three main questions that underlie this definition can help us gain a better understanding of what it means to create a strategy for our National Agencies:

Where are we now?

Where do we want to go?

How will we get there?

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

A "statement of intent" is a declaration of where you intend to go and how you intend to get there. So, in other words, a strategy is not about defining every single action that will be taken by every single person in the organisation for the next five years. **A good strategy describes the general intention and uses that as the platform for taking action.**

When we have successfully created a strategy, we can set priorities, focus resources and energy on these priorities and make sure that employees and other stakeholders **have a common understanding of the objectives and are accountable for reaching the common goals.** A clear strategy allows us to set specific intended results and milestones which later can be assessed and evaluated.

Please bear in mind that "intent" can change over time. No one knows what the future might bring. Circumstances change and when they do you might need to re-define your intent, sometimes radically. This is a normal part of strategy development.

TIPS

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

WHAT IS STRATEGY NOT?

Strategy is not a magic charm. Always keep in mind that strategy-making is not a case of finding the solution to the problem, but rather a path to finding solutions. Just as with any tool or method, it is up to you to shape a strategy which is appropriate for you, your situation and your organisation.

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

Is creating a strategy the same as project planning?

The three key questions - of where we are, where we want to go and how we will get there - can be applied in almost any situation, whether you are planning a wedding or an international study trip for your team. However, there is a subtle difference between making a strategy and planning a project (even a large-scale one).

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

TIPS

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

FEARS ABOUT STRATEGY

Even though many institutions have strategies, you might not yet be completely sold on the idea. **Many people feel that although the advantages of strategy are very attractive, the disadvantages outweigh any possible benefits**. They fear that strategy processes are costly in time and resources, too complex for non-experts to understand and that strategies reduce the flexibility of the organisation and add extra bureaucracy.

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

These fears are commonly held strategy myths. These myths are so powerful that they can stop the strategy development process before it even gets started. It is therefore important to understand where these and other strategy myths come from. We will explore this in the next section.

TIPS

Take a moment to think (maybe with your team) about what fears you have regarding strategy. Being aware of them can help us demystify them throughout the process.

STRATEGY MYTHS

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

" It takes a lot of time

First of all, we are afraid that **strategy development takes a lot of time**. Perhaps because in the past we were forced to take part in endless strategy discussions that did not lead to any concrete changes whatsoever. Unfortunately, this is very common. Organisations do not always know how to manage the strategy development process.

It is true that developing a strategy takes time. There is just no getting around it. Depending on your situation, it is possible to put together a good solid strategy in a matter of months,

possibly even weeks. More importantly, this investment of your time should not feel like a punishment. **As you move through your strategy development step by step, you will probably start to feel challenged in a positive way**. Your strategy development process should start to clarify many vague points and answer many outstanding questions. *If you could come away from your strategy development with a new energy and enthusiasm and with a clear idea what you are working for, wouldn't that be a fantastic use of time (and money)?*

Another misconception about strategy-making is that it is something over and above our daily tasks. If your reaction to the idea of developing a strategy is "oh great, one more thing I have to do", it is no surprise that you resist devoting time to it. Strategy-making should not be seen as an additional task, it should be seen as an integral part of the daily work of the organisation. Spending three solid days bashing out a strategy once a year is far less effective than devoting a quick 20-minute strategy check-in session during each weekly staff meeting.

" We don't want a strategy to limit us

Second, we are afraid that a strategy will limit what we are allowed to do.

Nobody likes to feel restricted or controlled, certainly not by

something as trivial as a plan on paper. **The non-formal youth sector attracts many people because of its energy, its creativity and its lack of hierarchical structures**. It is no surprise, then, that workers in this sector resist the idea of having to conform to regimented systematic plans. One common false presumption in strategy-making is the idea that you are going to be tied to a fixed plan for a long period of time. That is a great way to demotivate people!

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

Now if your salary was increased, wouldn't you automatically take another look at your budget? Of course you would – you would want to see where you can make changes and how much money you can now use for "playing". On the other hand, if your salary decreases, you would have to look at your budget to see where you need to make cuts. A budget is not permanent

and neither is a strategy. Both a budget and a strategy provide an outline, but they are never set in stone. A good strategy is made of a plan solid enough to stand up over the long term (despite changes in our environment) but which is also flexible enough to adapt to new situations when necessary. In this sense, a strategy is not a restriction but rather a guideline. It is the compass that helps keep you going in the right direction.

❝❝ We don't know enough to do strategy

Third, we are afraid that **you need special expertise to make a strategy** (and understand it!).

Go to your local bookstore and check out the books on strategy. Many of these books deal with the world of big business and do not seem to relate at all to non-profit or non-governmental organisations. No wonder then that so many of us do not feel we have the knowledge to develop our own strategies!

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

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

LEARN MORE

Strategic Mindset for Strategic Planning, Salla Saarinen at the TCA/NET 2021 Meeting of the E+ & ESC NA: *https://www.youtube.com/watch?v=yzsV622c4mA*

What Is Strategy, Harvard Business Review On Point Article, Michael E. Porter: *https://orion2020.org/archivo/pensamiento_estrategico/01_1_whatsstrategy.pdf*

The Strategic Mindset-Applying strategic skills for organizational success, Strategic Thinking Institute: *https://www.strategyskills.com/pdf/The-Strategic-Mindset.pdf*

Strategic-Planning-A-PLP-Toolkit, Intract, Rick James: *https://www.intrac.org/resources/strategic-planning--guide-small-diaspora-ngos/*

Strategic Planning Toolkit, Janet Shapiro: *https://www.civicus.org/view/media/Strategic%20Planning.pdf*
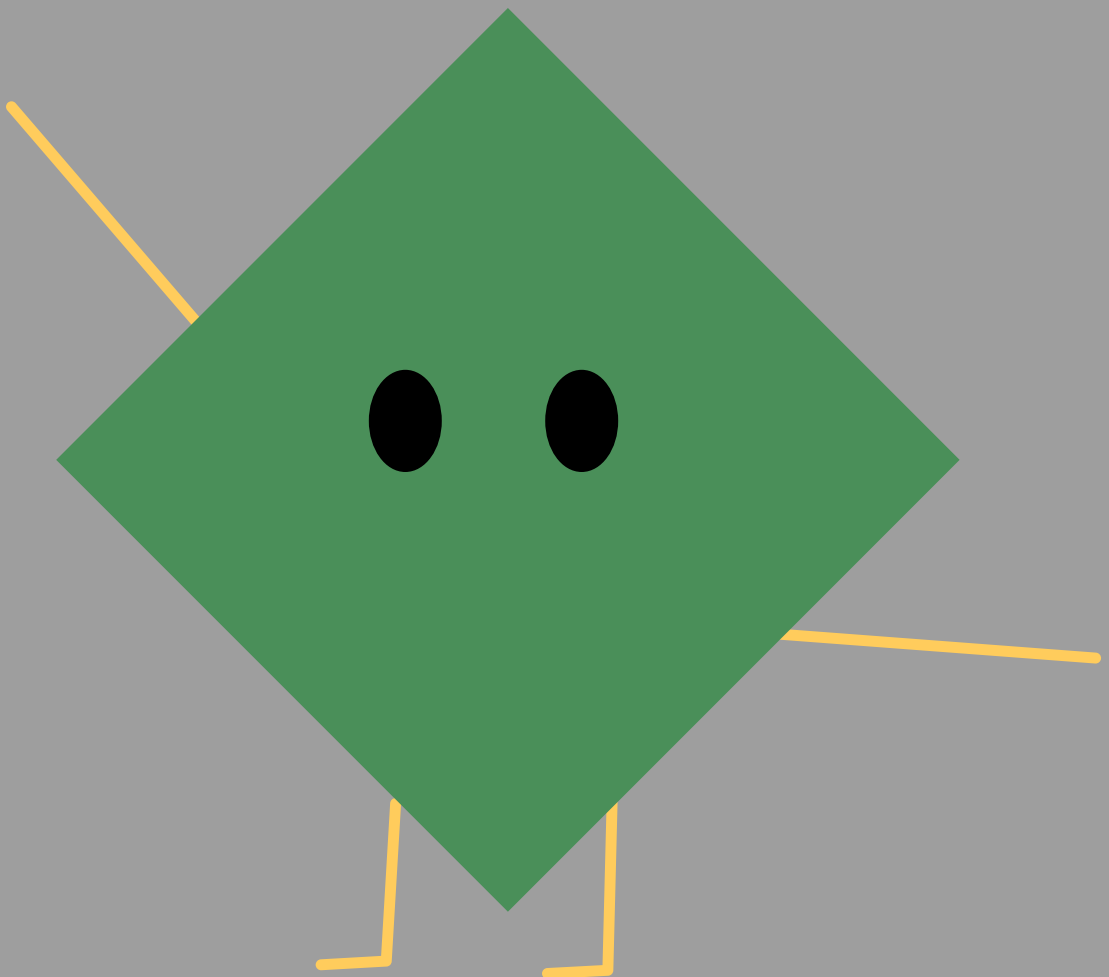
IMPORTANT CONCEPTS

When developing a strategy on inclusion and diversity, we must make sure we have a basic understanding of the core terms related to that area:

INCLUSION

Inclusion can be defined as **actively and intentionally removing barriers for the participation of groups and individuals with lesser opportunities, and valuing the diversity of backgrounds, beliefs, identities, capabilities, and ways of life**. In the context of Erasmus+ and European Solidarity Corps, inclusion focuses on young people with fewer opportunities.

People with fewer opportunities
The European Commission defines '*(young) people with fewer opportunities*' as *"(young) people who, for economic, social, cultural, geographical or health reasons, due to their migrant*

25

background, or for reasons such as disability or educational difficulties or for any other reason, including a reason that could give rise to discrimination under Article 21 of the Charter of Fundamental Rights of the European Union, face obstacles that prevent them from having effective access to opportunities under the Programme[4]"

BARRIERS

Barriers are **structures, policies, practices, and beliefs that limit or prevent some people's access to opportunities** that are available to others. There are several types of barriers and they can hinder participation both as a stand alone factors and in combination among them.

Whilst clarifying that the list if not exhaustive, The European Commission lists the following as barriers:

- Disabilities
- Health problems
- Barriers linked to education and training systems
- Cultural differences
- Social barriers
- Economic barriers
- Barriers linked to discrimination
- Geographical barriers

---

[4]European Commission: Implementation guidelines - Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy: www.salto-youth.net/inclusionstrategy/

DIVERSITY

Acknowledging the different characteristics in which individuals and groups differ from one another (for example, age, socio-economic status, gender, religion, sexual orientation, race, etc.) and striving to have the different identities in our society represented in the spaces we are part of[5].

STAKEHOLDERS

When we work on strategy, we need to have a clear understanding of the stakeholders of our National Agency. A stakeholder is anyone who has an interest in or who might be impacted by your strategy.

What types of stakeholders are there?

- **Internal stakeholders** - are people inside your organisation whose tasks will be impacted by your strategy. Internal stakeholders in the National Agency could include the Project Officers in each separate Action, the inclusion and diversity officer, the selection committee, contacts in the regional offices and the Head of the Agency.

  Remember that not everyone in your office should automatically be considered as a stakeholder. It should only be those who will be most affected by your plans and those who will make the biggest contribution to the strategy-making process.

---

[5]Salto Inclusion & Diversity, Embracing Diversity: www.salto-youth.net/embracingdiversity/

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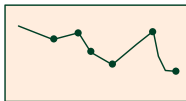
LEARN MORE

Embracing Diversity: *A guide to diversity management for organisations active in intercultural youth work: www. salto-youth.net/embracingdiversity/*

Social Inclusion Resources: *The SALTO Inclusion and Diversity Resource Centre develops, collects and disseminates resources which can help youth workers and youth leaders to implement international, youth inclusion projects: www.salto-youth.net/inclusion/*

SALTO Newsletter: *www.salto-youth.net/newsletter/*

INCLUSION IN EUROPEAN SOLIDARITY CORPS AND ERASMUS+ PROJECTS

THE 2021-2027 EUROPEAN STRATEGY PRESENTED

After the mid-term evaluation of 2014-2020 Erasmus+ programme cycle in 2017, the European Commission started a co-creation process with the aim of developing a new inclusion and diversity strategy for Erasmus+ and European Solidarity Corps.

Take a look at the Implementation guidelines - Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy: www.salto-youth.net/inclusionstrategy/

The aim was to give continuity to the work already undertaken, whilst laying the foundations for better monitoring of inclusion and diversity in the programmes and reaching a wider range of groups and audiences. In other words: going beyond the usual suspects with the financing and really making the programmes accessible for people with fewer opportunities.

The strategy implementation guideline also aims to streamline inclusion and diversity efforts in all programme areas (all Erasmus+ programmes and European Solidarity Corps) and build on the groundwork that has already been laid in the youth sector. The cross-sectoral strategy will **reach all the different areas of activities of National Agencies** through adapted funding rules, introducing new types of monitoring, suggesting guidelines for communication campaigns, etc. The strategy also aims to create synergies between the different priorities: making the programmes greener and more digital and promoting participation and inclusion.

As part of the new strategy, concepts used in the different sectors are also being harmonised. One umbrella term that will be used across the different programmes is "participants with fewer opportunities" rather than speaking of underrepresented or disadvantaged groups. The new strategy also reinforces the role of organisations and increases the support given to them to make their programmes more inclusive.

The **2021-2027 Erasmus+ and European Solidarity Corps Inclusion and Diversity Strategy** will have far-reaching implications for the inclusion work of National Agencies. Some of the most notable changes in the European Commission's Implementation guidelines include:

- A shared definition of inclusion-related objectives and terms for all the chapters of the Erasmus+ programme and for European Solidarity Corps.

- New documentation and IT tools that help streamline data collection.
- Progressive expectation of National Agencies to create national inclusion and diversity strategy.

It is important to keep in mind that the European Commission's Inclusion & Diversity Strategy presents a very global approach to inclusion. **It is not possible (nor desirable) to make one inclusion strategy which suits all the countries of Europe.**

The success of the European-level inclusion strategy depends on each National Agency's ability to develop a strong national-level plan, which can respond to the real needs in each separate country. The national-level plan should not veer away from the European Commission's global inclusion implementation guidelines, instead it should clearly link in and complement it.

Within their national-level plan, National Agencies need to focus their attention on issues which they can influence.

For example, in which areas of inclusion does the Agency want to grow? Which audiences will be focused on? How will these groups be reached? What does "success" look like for these groups? How will this success be measured? How will we promote that success once a project has finished?
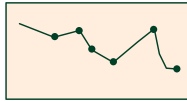
THE 2021-2027 PROGRAMME CYCLE

Erasmus+ strengthens its efforts to increase the opportunities offered to more participants and to a wider range of organisations, focusing on its qualitative impact and contributing to more inclusive and cohesive, greener and digitally fit societies[6].

The 2021-2027 Erasmus+ programme cycle has moved inclusion into a much more prominent light: being inclusive is now explicitly in the application criteria. The programme guide states that: "*When designing their projects and activities, organisations should have an inclusive approach, making them accessible to a diverse range of participants*".

Furthermore, there is a strong focus on increasing transdisciplinary cooperation and the **involvement of institutions that do**

not yet have any experience with the instrument. To enable the participation of these organisations, the application process has been simplified compared to previous cycles. At the same time, the application process stresses inclusion and diversity elements more. Applicants are now asked how they will make their programmes inclusive, rather than simply asking how many people with fewer opportunities would be reached.

Another novelty is the **"smaller partnerships" format**, especially aimed at smaller organisations that never applied before. The new horizontal priorities are now streamlined across all programs: inclusion and diversity; environmental awareness and efforts to fight climate change; digital transformation; shared values, civic engagement and participation. The cycle now allows for **increased possibilities to opt for blended mobility** - meaning to combine online and offline elements. Besides that, **additional funds are available to make the project more inclusive, promote environmentally friendly travel as standard and support virtual events.**

Similarly, European Solidarity Corps has introduced **shorter and more flexible formats** that can adapt to more diverse needs and strengthens its focus on inclusion and diversity: "*The European Solidarity Corps should also support projects and activities actively addressing the issue of inclusion and diversity more broadly in the society[6]*".

---

[6]European Solidarity Corps Programme Guide: https://europa.eu/youth/solidarity/organisations/calls-for-proposals_en
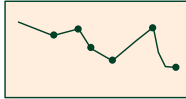
LEARN MORE

Erasmus+ Programme Guide: *https://ec.europa.eu/programmes/erasmus-plus/resources/programme-guide_en*

European Solidarity Corps Programme Guide: *https://europa.eu/youth/solidarity/organisations/calls-for-proposals_en*
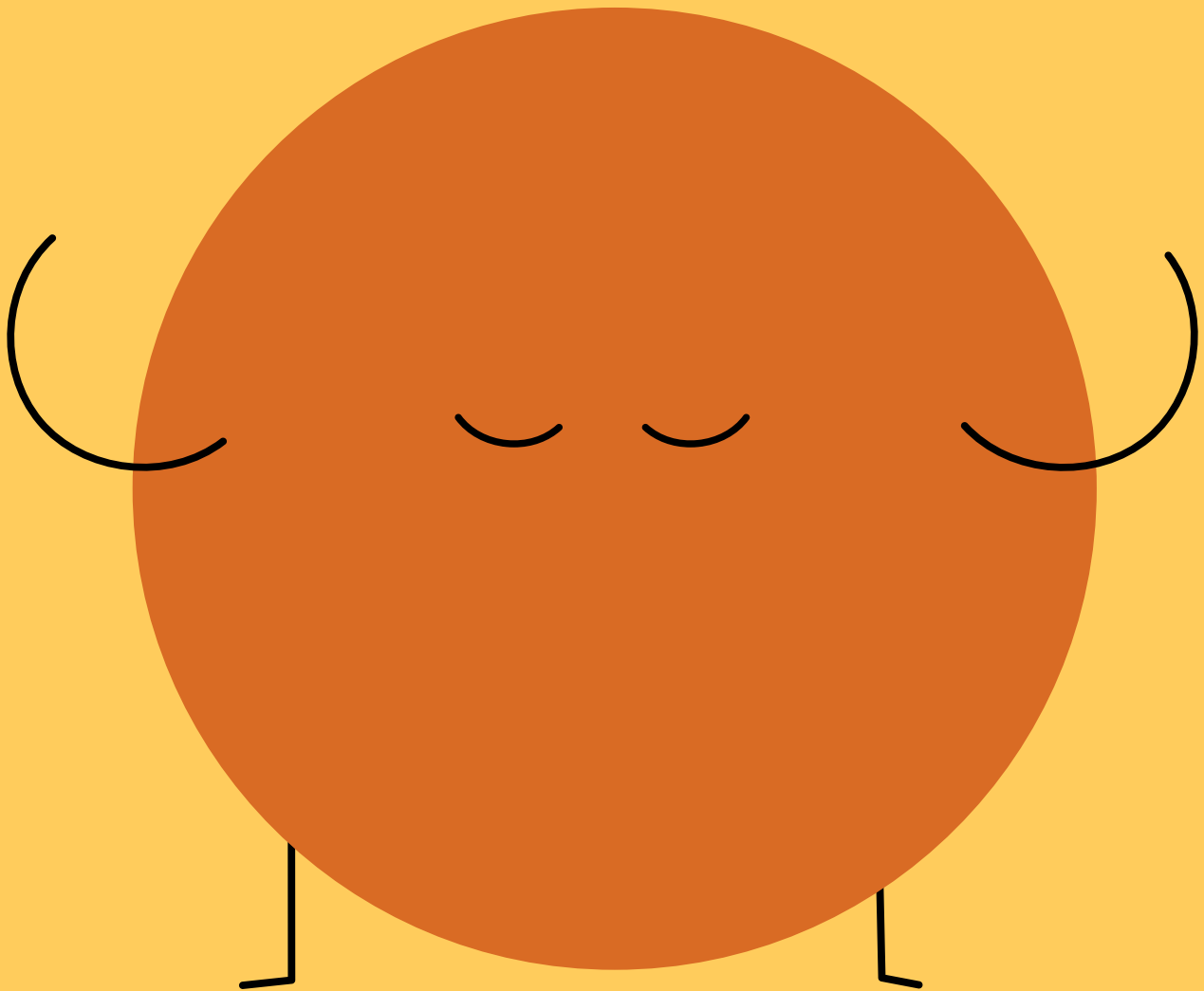
CREATING A NATIONAL INCLUSION AND DIVERSITY STRATEGY

Listen to Episode 3 of the "Shaping Inclusion and Diversity Podcast" envisaging about the future with your colleagues and hear how different National Agencies understand the strategy process.

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

Many National Agencies have already elaborated strategic documents or action plans linked to inclusion and diversity in the past cycles. Yet, for smaller organisations and those who are new to strategic planning, this can seem a complex issue.

TIPS

Keep in mind that your strategic document does not have to be written in a very complex way. It does not have to be very long either. It is important to be accessible so people can actually understand it, remember it and put it into practice.

CREATING A STRATEGY TEAM

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

A good practice is to create a strategy team to lead the creation of the inclusion and diversity strategy. **The strategy team is a core group of people who are responsible for gathering information and making choices in the early stages and for implementing, monitoring and evaluating the action steps in the later stages**. The strategy team will likely be made up mostly of internal stakeholders. However, if possible, **it is a good idea to create the strategy team across sectors and include external stakeholders as well**.

If you are lucky, your National Agency already has a body such as a working group on inclusion and diversity, or an advisory board that can collectively lead the strategy process. If not, the strategy process can be a great opportunity to create such a group and start streamlining inclusion and diversity more broadly across the organisation.

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

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

TIPS

No matter what the size or composition of the strategy team, it is a good idea to invold the Head of a National agency whenever possible. The director can help ensure that the inclusion strategy links in with the rest of the National Agency's activities.

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

Sharing responsibility for inclusion and diversity as broadly as possible in the National Agency is important because:

- Ideally, all practices by the National Agency should be inclusive and **co-creating the strategy will increase people's sense of ownership** for the resulting action plan;
- Inclusion and diversity officers feel supported and know "they are not alone";
- Joint actions are more easily implemented across departments;
- New initiatives are created with an inclusion lens from the beginning.

TIPS

Each department or role within the organisation has a different perspective on inclusion and diversity. Some have direct contact with beneficiaries and others do not. So make sure there is space to share and exchange perspectives and experiences.
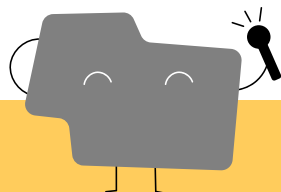
LEARNING FROM THE EXPERIENCE OF OTHERS

Belgium Flanders*: "Although as the inclusion and diversity officer, I have the special "inclusion goggles", the topic is well-supported across the organisation. We have an inclusion working group, with a member of each team. There is someone from SALTO, a project officer, someone from the communication team, someone from the coordinating team (logistics and admin) and a representative of the directory. Together we work on inclusion relevant topics and disseminate our discussion back into our different areas."*

Germany*: "It's important to train the team. We want to make sure that everyone has the same understanding of inclusion and diversity and really has awareness about the topic. And that really means everyone: programme officers but also PR / communication department, TCA/NET officers, etc."*

Austria*: "It's not an easy job. It can help a lot to connect with your international colleagues. They can be your sounding board, push you further and give you new inspiration when you are stuck."*

WHERE DO YOU STAND?

Different National Agencies stand at different stages in their strategic development regarding inclusion and diversity. The following questions can be a starting point for assessing your own situation and creating a first conversation with your team around the topic:

- Do you already have an inclusion and diversity strategy or a working plan?
- Are inclusion and diversity mentioned in any other strategic documents?
- Do you know what actions will be taken in the area of inclusion and diversity in the next 3 years?
- Does your National Agency have clear targets or goals when it comes to inclusion and diversity?
- Are you aware of any data regarding the inclusion of the programmes you promoted and organisations you supported?
- Do you have a good understanding of the skills and knowledge available in the team when it comes to inclusion and diversity?
- Has anyone in the team attended training on inclusion and / or strategy?
- Do any of the organisations you liaise with have any strategic documents linked to inclusion and diversity? Think about national youth departments, youth work umbrella organisations, etc?

- Do key stakeholders have regular meetings on inclusion and diversity matters?
- Etc.

TIPS

Even if you have not really started working on inclusion and diversity strategy for your National Agency yet, there is definitely work that has already been done that you can use as a base. Start there!

LEARN MORE

SALTO Inclusion & Diversity RC support for NAs: *www. salto-youth.net/inclusionsupport/*

Youth Policy Manual - how to develop a national youth strategy, *Finn Yrjar Denstad: https://tinyurl.com/d8kr-m84c*

Free Nonprofit Micro-eMBA Module 6: Developing Your Strategic Plan, *Free Management Library: https://tinyurl.com/v6rrkwja*

THE FOUR PHASES OF STRATEGY

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

1.The Analysis Phase   **2.** The Planning Phase   **3.** The Implementation Phase   **4.** The Evaluation Phase
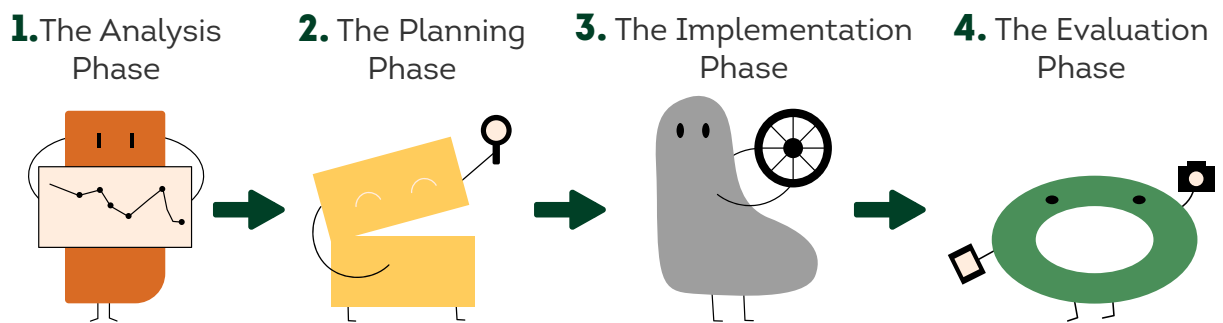
Dividing the process into these four phases helps us understand that creating a strategy is not a one-time process. It's different phases stretch over a period of time and require different approaches.

- The first phase, **Analysis**, involves taking time to understand where you (as an inclusion and diversity officer) are starting from. What was your situation in the past? What is your situation today?

- Once you have a clear picture of where you are starting from, you are ready to begin the second phase: **Planning**. What do you want your situation to look like tomorrow? Here you start making the choices which will define your future direction.

- The third phase, **Implementation**, involves identifying the steps you will take and putting those steps into action.

- The fourth and last phase, **Evaluation**, lets you know to what extent you have or have not been successful.

Each of these phases plays a vital role in a successful strategy. In the next chapters, we are going to look in more depth at each of these 4 phases.

The Milestones

Each of these four phases can be broken down into smaller steps - or milestones - which make the process simpler to manage and also make it easier for you to see progress being made (see the diagram below).

Analysis → **Planning** → **Evaluation** → **Implementation**

- Analysis
  - Need analysis
  - Summary

- Planning
  - Identifying potencial, action areas
  - Choose priorities
  - Defining objectives and desired results

- Evaluation
  - Process
  - Results
  - Impact

- Implementation
  - Action Plan
  - Monitoring
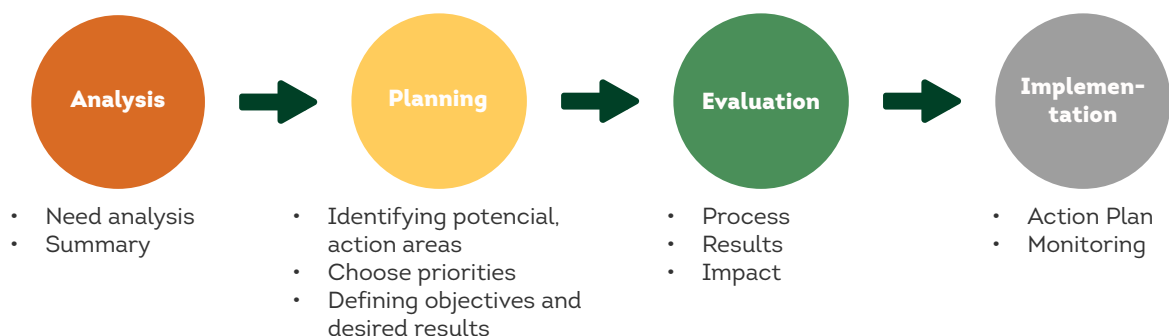
Strategy as a cycle

On paper, strategy looks like a logical and linear process moving steadily from Analysis to Planning to Implementation and finally to Evaluation. In real life, however, **strategy is actually much more cyclical**:
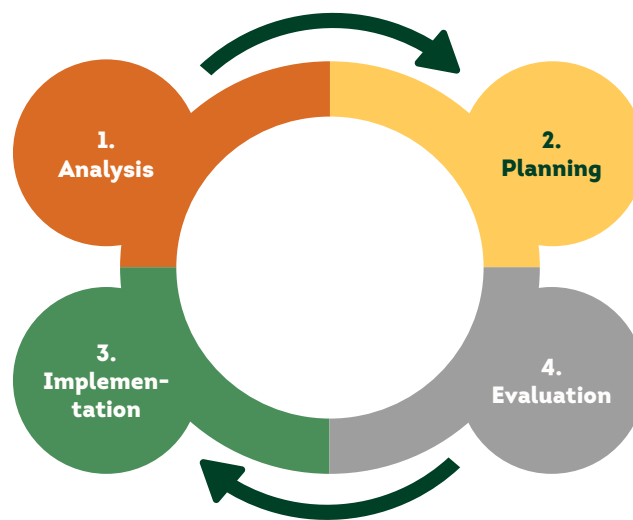
As you go deeper into strategy-making, you will see that whilst **some steps need to be carried out in a particular order, other steps are less systematic and may overlap considerably**.

It is quite normal to be busy with two or even three phases at the same time. You may have to start Implementing before you have totally completed your Planning. Likewise, you may be deep in the Implementation phase when circumstances change. This could force you to go back to make a new Plan and possibly even a new

Analysis. Evaluation will also take place at many points through-out the process, not just at the end. **Do not become too preoc-cupied by the order of the steps**. Concentrate instead on moving the process forward as best you can.

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

The most effective strategies are those which can respond and adapt to changes as they arise.

A strategy should not be just another document gathering dust on the shelf. **It should be a living document; moving and evolving as necessary.**

Having said that, it is important to stress that **strategy develop-ment must start at the beginning**. It is not logical (and certainly not effective) to start implementing action steps before you even know where you are starting from.
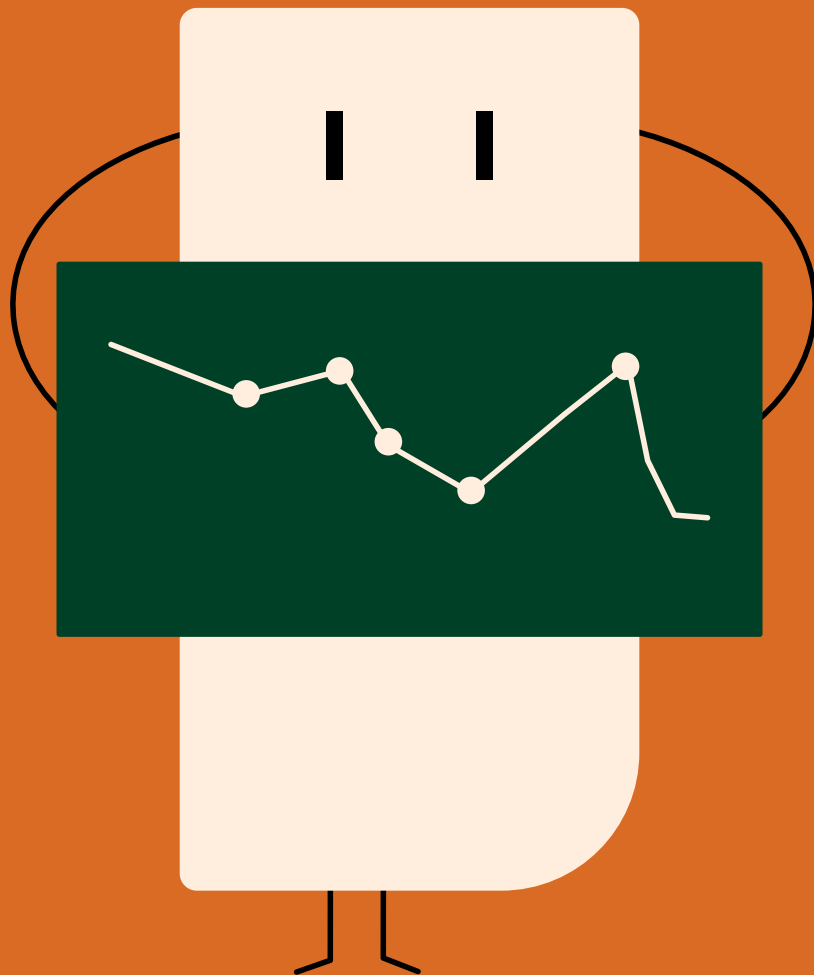
THE ANALYSIS PHASE

Listen to Episode 4 of the "Shaping Inclusion and Diversity Podcast" to dive deeper into why the Analysis phase matters and how it feels to go through it.

WHAT IT IS

Before you can get started actually writing your national inclusion and diversity strategy, you first need to get a feeling of the information and experience that you already have at your disposal. This Analysis phase has the purpose of helping you understand what your strategy should actually tackle. In other words, **where work needs to be done**. You can collect this information by carrying out a "needs analysis".

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

A needs analysis helps you determine your current position so you can decide where to go from here.

In essence, a needs analysis is:

- A **review** of your past successes and challenges in terms of inclusion and diversity
- A **collection** of relevant documents developed by your stakeholders (national youth department, European Commission documents, SALTO publications, etc.)
- An **inventory** of what has been developed and what areas still need to be explored
- A **health check** of your internal procedures
- A **framework** for understanding the "bigger picture" of inclusion in your country.

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

A needs analysis involves:

- Collecting background information
- Understanding the real needs of the organisations and their beneficiaries
- Identifying potential partners and potential obstacles in the inclusion field
- Making an inventory of the skills, competencies and resources available to you

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

It is important to note that your needs analysis is **not** an evaluation. This phase is first and foremost about **seeing** the facts. The **interpretation** of those facts happens later in the Planning phase.

TIPS

The needs analysis is the most work-intensive and time--consuming aspect of developing a strategy, but do not let this put you off. The information you gather in this phase will be worth gold later on. By doing a needs analysis you are making an important investment in your inclusion strategy and in your National Agency as a whole.

MILESTONE 1:
NEEDS ANALYSIS

There is not one standardised method for carrying out a needs analysis. **The process is a lot like trying to put a jigsaw puzzle together**. The puzzle pieces will look different in each national reality. You can find some examples further down. Each puzzle piece is unique and shows a different angle of your organisation and the environment around you. Each piece is essential to providing a complete picture.

To understand their current situation in terms of inclusion, a National Agency needs to focus on the following puzzle pieces:

- **Previous strategy documents** – Your National Agency might have already created a previous version of an inclusion and diversity strategy. Inclusion and diversity might already be part of the organisation's mission, general work plan or any other documents. What objectives do these documents hold? Were those objectives achieved? Why or why not?

- **Your past performance** – In terms of inclusion, what has your National Agency concretely achieved to date? To what extent have you successfully been inclusive? To

what extent have you successfully contributed to diversity? Can you spot any significant trends? What has been the role of key players within the National Agency? What challenges or difficulties have you faced in the past?

- **Your internal systems and processes** – Are your systems as effective as they could be? Consider: processes related to promotion and recruitment, selection, the distribution of finances, evaluation and follow-up, etc.

- **Your key external stakeholders** – The range of external stakeholders is very broad in the field of inclusion, nevertheless, National Agencies should have some information about the circumstances, needs and expectations of each specific group. What is their motivation for taking part in Erasmus+ and European Solidarity Corps? What were the experiences of organisations that applied for one of the programmes? Consider the experiences of those who were successful and those who were not. What are their biggest needs at this time? What are they looking for from you? To what extent have you successfully fulfilled those expectations?

- **First hand experiences** – What were the experiences of participants of programmes funded through Erasmus+ and European Solidarity Corps - especially those with fewer opportunities?

- **Your competitors** – Yes, even National Agencies have competitors and yes, they even exist in the field of inclusion. What are other organisations or institutions working on inclusion doing? What is their strategy? What are they trying to achieve? Which groups are they focusing on? How might their inclusion work affect yours?

- **Socio-economic trends and changes** – Social, economical and political changes usually affect the most vulnerable groups in society first. Any major shifts or trends in this area will likely have a big impact on a National Agency's inclusion work. What is going on locally, regionally and/or nationally? Which public policies exist? What programmes do the youth departments promote? How might this impact the young people and project promoters you work with?

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

By collecting the information in each of these separate areas, you

are painting a picture of what is going on in and around your National Agency right this moment. This will tell you exactly where you are in terms of inclusion and what your starting point is. Not all the information you collect will be positive, but remember that **to really know your situation, you must be objective**. You are looking for the cold hard truth.
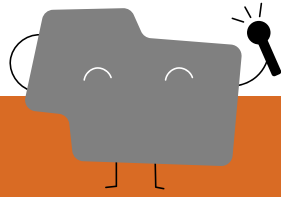
LEARNING FROM THE EXPERIENCE OF OTHERS

Belgium Flanders: *"We gathered a lot of different information: we talked to other members of our National Agency, talked to successful and unsuccessful applicants, talked to participants. We also did an external evaluation on how inclusive we are as an organisation, which brought a lot of aha-moments. Just the process of answering those questions was already really useful."*

Ireland: *"When we share about our inclusion & diversity efforts with potential applicants, we have to be careful that we don't patronize them. Sometimes, they have much more experience in inclusion and diversity strategy than we do. So we need to recognize the work and learn from them, rather than trying to pretend we are the experts."*

Romania: *"We started asking ourselves: is this really inclusion? Do we reach the right people? Are there more organisations to reach? Do they know about us? Do they know us, but aren't interested? And then we tried to find the answers to these questions."*

Belgium Flanders: *"We need to really look at how inclusive we are at all levels. How does anyone perceive us that is in contact with the NA? How diverse are we as NA staff and experts? How well are we representing the society we represent?"*

Gathering information

The Analysis phase of the strategy process requires you to use a diverse set of tools and methods. These include but are not limited to:

- Analysing **data and reports** gathered from programmes;
- Accessing **external reports** and **statistics**;
- Sending out **questionnaires** and **surveys**;
- Organising **focus groups** and doing **interviews**;
- Conducting a **task or systems analysis**.

MILESTONE 2: SENSE-MAKING

As the needs analysis progresses, it is likely that you will collect a large amount of information and data. **The challenge lies in making sense out of all the different outcomes** by pulling out the elements which are the most valuable or which will have the most impact on future inclusion activities.

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

negative points to come from your research.

SWOT Analysis

The SWOT Analysis helps you organise the information gathered into four main areas:

	helpful	harmful
internal	**STRENGTHS** What has been going well in our inclusion work? What is the National Agency good at?	**WEAKNESSES** What has not been going well in our inclusion work? What resources or skills is the National Agency missing?
external	**OPPORTUNITIES** Which new audiences would be interesting for us to work with? What new laws, legislation or social trends offer us exciting new possibilities?	**THREATS** Which inclusion activities/services are being duplicated by our competitors? Which socio-economic or political trends might negatively affect us, our project promoters or the young people?

Here's how you do it:

Draw up a SWOT table according to the outline above. Use the sample questions in the outline to help you decide which key elements from your analysis belong under which heading.

Remember that **strengths and weaknesses** refer to what you can control inside your organisation (internal elements), while **opportunities and threats** refer to forces beyond your control outside your organisation (external elements).

TIPS

Select the most obvious or urgent points for each heading (try to limit yourself to a maximum of 10 points per category).

Once you have reached agreement on the priorities with your director and within your strategy team, share it with your key stakeholders. The most important of these for a National Agency are, of course, the project promoters, however stakeholders also include members of your own staff, as well as other important external parties. This is a way of **double-checking your conclusions**. Your stakeholders can point out any areas which may have been misinterpreted or which are already being addressed.

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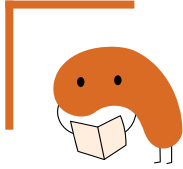
For more tools for the Analysis Phase, go to the Tool Library.

The tool library at the end of the documents offers you an overview of different tools for each step of the strategy process.

DO'S AND DON'TS OF THE ANALYSIS PHASE

When it comes to the Analysis phase, you should be mindful of some danger areas. These traps are easy to fall into and can have serious consequences for your strategy over the long term.

DON'T	DO
Try to skip the Analysis phase.	See the Analysis as a way to make an inventory of your current situation and as a way to establish the baseline against which the results of your strategy will be measured.
Assume you already know the outcome.	Take time to hear the views of other stakeholders.

Overlook key information sources.	Ask stakeholders for their recommendations on where to look, what to read, who you should speak to, etc.
Overlook personal bias.	Make sure the information you collect is reviewed by a variety of stakeholders.
Disregard or disbelieve unpleasant facts.	Use the facts to make changes or improvements if necessary.
Accept incomplete data.	Strive to compile as complete a picture or situation as possible.
Be too quick to interpret results.	Focus on gathering rather than interpreting information in this phase.
Collect so much data that you feel overwhelmed.	Manage information you have gathered by asking and reflecting if the information is important or not. If it is not, disregard and move on.

THE PLANNING PHASE

WHAT IT IS

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

TIPS

Do not be afraid of subjectivity. The strategy process is highly subjective. Subjectivity does not need to be a problem, as long as the strategy team can explain the reasons behind their choices.

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

There are many different ways National Agencies can approach the Planning phase, but in essence the process consists of three main steps: **Identifying potential action areas; Choosing priorities; and Defining objectives and desired results**. These steps are the same no matter the size of the National Agency and no matter what your level of involvement in inclusion is.

Identifying potencial,
action areas

Choose
Priorities

Defining objectives
and desired
results
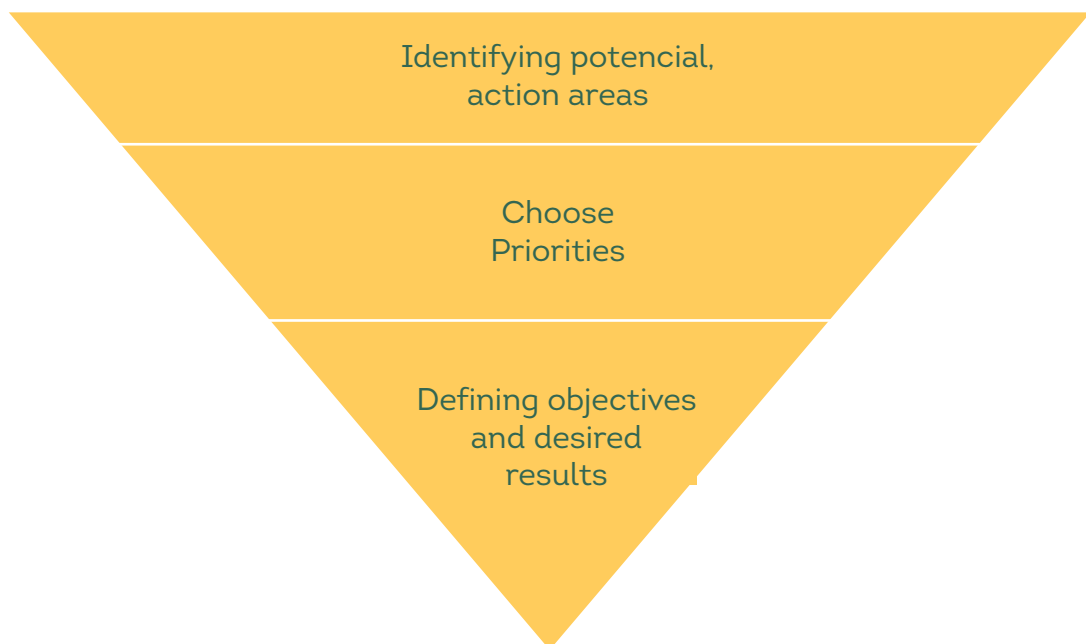
The best way to visualize the Planning phase is to think of an **inverted triangle** (see the diagram above). The triangle can help us to understand that creating a strategy also means making choices and limiting our scope. Although the inclusion field is very large and there are many needs which all require urgent attention, it is simply not possible for a National Agency to respond to all of these needs.

In short, the Planning phase involves a series of steps which **takes a wide range of potential action and narrows it down to a short list of priorities**. Those priorities are then narrowed down even further into concrete objectives and specific results that your National Agency aims to achieve.

TIPS

While there are many methods you can use to help you manoeuvre through the Planning phase, the main tool is group dialogue. A strategic plan is based on choices and the only way to make those choices is for the strategy team to sit down, talk through the different possibilities, weigh the choices carefully and ultimately make their decisions.

MILESTONE 1:
Potential action areas

Different methods can be used to make this inventory of areas in which you could get active. One helpful and thorough technique is to use the SWOT analysis, from the end of the Analysis phase, to highlight areas where your National Agency could invest, mobilise and focus:

This is sometimes called the "SWOT Interplay" - see the Tool Library for a detailed description of this method.

Another way is to simply brainstorm and write down all the different types of action you can think of, which are relevant to the National Agency at this time. Consider the following questions, whilst remembering the overarching goals of the Inclusion and Diversity Strategy and the points raised in your needs analysis:

- What can we do that will help our National Agency achieve our purpose in inclusion and diversity?
- What activities will do this?
- Do our actions/activities today make sense in terms of the European Commission's strategic framework?
- Are there other things we should be doing?

When answering the questions, the following areas should be considered:

- Exploring new opportunities
- Creating new contacts
- Improving the activities/services of the National Agency
- Improving systems and processes inside the National Agency
- Offering education and training (inside and outside the National Agency)
- Addressing problem areas or urgent issues
- Addressing leftover or incomplete goals and actions in inclusion (e.g. from last year, from a previous strategy, etc.)

In this step you are looking for all feasible areas for action. **Do not limit or censor yourself (or your colleagues) in the brainstorming phase - put down all your thoughts** about what could, or should, be done in inclusion at national level.

Your result at the end of Milestone 1 is a **list of potential action areas**. It is likely that you will immediately **recognise certain actions which are not realistic, or which are not essential** to the National Agency at this point in time. Cross these off your list immediately. The remaining list of points is probably still fairly long. It would not be efficient to try to take action on every one of these, so the second step in the Planning process requires the National Agency **to prioritise**.
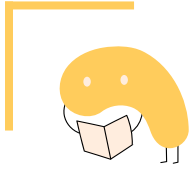
MILESTONE 2:
Choose priorities

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

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

There is no one fail-safe method for choosing your priorities. Inclusion is a particularly difficult area to prioritise because the spectrum of audiences is so diverse and the number of potential actions is very big. One way to determine priorities is to

pair different potential actions and compare which of the two has higher importance.
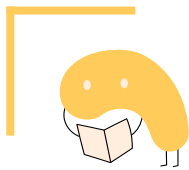
This technique is called a "Paired Comparison Analysis"- see the Tool Library for a more detailed description of this method.

If you prefer a more informal method, review your list of potential action areas and then ask yourself the following questions:

- What is our National Agency best qualified to offer in order to address the areas identified?
- Is anyone else already doing what we can do? If so, do we have anything to add?
- In the areas where we are qualified, where can we make the most significant difference?
- Where can we affect the biggest changes with minimum investment?
- What are the pros and cons of the different potential action areas?
- Will this make the best use of the National Agency's resources?

After considering the answers, start to prioritise the action areas. Ask yourself:

- What is most important for our current and future work?
- What is too serious to ignore?

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

TIPS

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

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

TIPS

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

Check out the <u>Tools Library</u> for more methods for prioritising actions.

MILESTONE 3:
Defining objectives and desired results

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

An objective is the object or aim of an action[7]. **An objective states what is to be done and indicates the results to be achieved**. Defining meaningful objectives may take a bit of thinking but you can make the process much simpler by beginning at the end - by determining what specific results you want to achieve. After all, if you know where you want to end up, it is much easier to say what needs to be done to get there.

Priority → **Desired Result** → **Objective**

[7]Allen, Gemmy. Management: Meeting and Exceeding Customer Expectations, 2007.

Desired results

Start by defining your desired results. For that, choose one of the priorities from your list and ask yourself:

- What exactly do you want to achieve in this area?
- How much / how many do you want to achieve?
- For whom (which audience)?
- Within which timeframe?

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

Formulating SMART objectives

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

S = Specific?

M = Measurable?

A = Agreed upon (by the team)?

R = Realistic?

T = Timebound?

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

Check out the following examples to understand how priorities are broken down into more specific desired results and objectives:

Example 1:

An National Agency has noticed that compared to other profiles, the number of young Roma women taking part in Erasmus+ and European Solidarity Corps in your country is very low. The National Agency decides that increasing the number of female participants from Roma backgrounds should be one of their priority action areas.

Priority Action Area	Desired result (after 3 years)	Objective
Increase the number of Roma women participating in our activities	Have a minimum of 20 Roma women taking part in activities in each of the separate actions of Erasmus+ and European Solidarity Corps	To increase the participation of Roma women to a minimum of 20 per year in each separate action of Erasmus+ and European Solidarity Corps

74

Example 2:

Another National Agency has been successful in including young people with fewer opportunities from a variety of backgrounds in their Erasmus+ and European Solidarity Corps programmes. However, they are unable to say to what extent that their participation has contributed to the wider inclusion of the young people as a whole. The National Agency decides that developing a new system of evaluation to measure inclusion should be one of their priority action areas.

Priority Action Area	Desired result (after 3 years)	Objective
Develop a quality-based evaluation system which measures social inclusion resulting from the Erasmus+ and European Solidarity Corps programmes	Have newly-defined quality indicators and evaluation systems in place and in use by all Erasmus+ and European Solidarity Corps programme promoters	To develop and implement a new evaluation system based on quality indicators for measuring social inclusion as a result of participation in Erasmus+ and European Solidarity Corps programme to be used by all project promoters

Defining a timeframe

When defining objectives and desired results, National Agencies need to **pay close attention to the timeframes in which these are to be achieved**. There is no hard and fast rule for defining a

timeframe; the choice will be different in each National Agency. Some National Agencies are in a position to create a 5-6 year strategy for the years 2021-2027; whereas others may find it difficult to define objectives for such a long period.

If your National Agency is developing an inclusion plan for the first time, it is advisable to choose a shorter period, for instance 3 years. This is long enough to allow the National Agency to achieve complicated objectives, while at the same time is short enough to keep up the team's energy and enthusiasm.

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

TIPS

As the strategy team moves through the three steps, it is very important to aim for consensus on all the points to be decided. If any member of the team is unhappy with the choices being made, the underlying issues must be sorted out immediately.
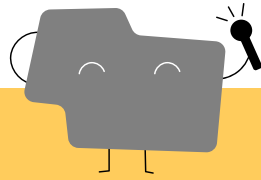
LEARNING FROM THE EXPERIENCE OF OTHERS

Germany: *"We have three main focus areas when it comes to inclusion and diversity strategy:*
- *Reaching new and more organisations that reach diverse audiences;*
- *Supporting organisations who already use the programmes to become more inclusive;*
- *Supporting networking between organisations already active in the programmes and those who work with diverse audiences. We have received a lot of feedback from organisations that show us that this networking approach is highly appreciated."*

Ireland: *"We started off by including our inclusion and diversity targets in our strategic plan. That is a high-level document that keeps all the important goals we have together. Our board monitors the implementation of that strategic plan. It's now up to the inclusion and diversity officer to oversee the translation of that strategic plan into an implementation strategy"*

Finland: *"Our work plan summarizes the four actions we want to take: 1. Having a common understanding of what inclusion means from a Finnish perspective; 2. Making sure that we have a supportive approach so we can be accessible for different kinds of organisations to apply for funding; 3. Making it clear in our communication materials that we are accessible and anyone can approach us; 4. Promoting real action to improve inclusion through our training budget, priorities and approaching specific groups."*

Serbia: *"We really wanted to get input on our strategy from the groups we want to reach. For that, we organised a series of meetings with representatives of national associations. We wanted to hear how they perceive us and what their obstacles really are. In the first draft of the strategy, we identified obstacles based on our experience and analysis, but we didn't want to assume that list was complete or correct. We wanted to check this with the representatives of these groups."*

DO'S AND DON'TS OF THE ANALYSIS PHASE

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

DON'T	DO
Deviate from the National Agency's global strategy.	Make sure that inclusion priorities and objectives link in clearly with the rest of the National Agency's strategic plan.
Rush the planning process.	Take as much time as you need to discuss and debate your choices thoroughly in the strategy team.
Be overly ambitious.	Set boundaries for your plan which are challenging but are also realistic.
Forget to consider how you will implement.	Be aware of what individual objectives might require in terms of time and resources before you prioritise them.

Forget to keep the director up to date.	Take time to explain the logic behind the team's choice and decisions and get the director's approval before you move into the Implementation phase.
Define objectives which overlap, conflict or compete with one another.	Ensure that individual objectives are in alignment (i.e. that they fit together and complement one another).
Delay implementation by trying to "perfect" your plan.	See your strategic plan as a work in progress and start implementing as soon as possible.

LEARN MORE

The Practice of Management, *Peter Drucker:*
https://tinyurl.com/4su3u62f
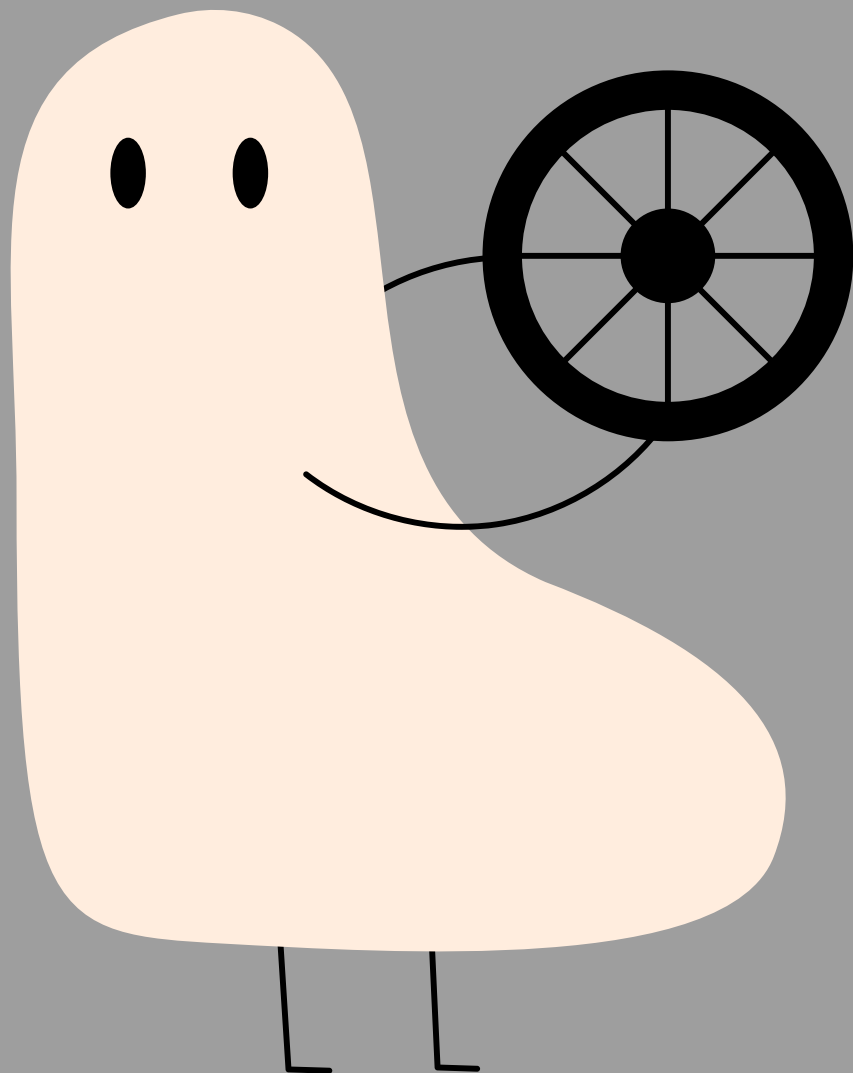
THE IMPLEMENTATION PHASE

Listen to Episode 6 of the "Shaping Inclusion and Diversity Podcast" to hear best practises on putting inclusion and diversity strategies into action.

WHAT IT IS

After you have defined the priority action areas, concrete objectives and desired results for your inclusion work, it is now time to **connect those objectives with people, deadlines and budgets**. This process is what turns your ideas into action.

Failing to turn ideas into action is where most strategies fall apart. Many organisations spend huge amounts of time and money to make a perfect strategic plan, but when their staff read through it, it means nothing as there is **no description of what is supposed to happen next and who will be doing it**. This makes it easy for the staff to ignore the plan.

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

MILESTONE 1:
Action plan

In order for your inclusion strategy to be truly effective, you need to create an action plan which includes each of the objectives on your list. The precise form of your action planning will depend on how project management is done in your National Agency.

In reality, an action plan is not very different from a **"to-do" list. The** success of your strategy is largely dependent on **how well your "to-do" list is put together**. It should answer all of the following guiding questions:

Action Plan			
What needs to be done?	Who will do it?	What resources are needed?	Until when will it be done?
Define how you intend to achieve the objective	Define the responsibilities	Define the budget	Define the timeframe

At first glance this may seem difficult but you have already laid the groundwork for this task during the Planning phase. You have already defined objectives AND the concrete results you want to see. Now it is a relatively simple matter of **plotting out the steps** that will get you there.

Your **strategic plan** has clearly named the results you want to see for every objective **within a certain period of time**. While it is possible to make an action plan stretching for the whole 3 or 5 years period of an action plan, this is probably a little too ambitious. A lot of things could change in your National Agency in that period (staff turnover, budget changes, political and economic events which affect your audience, etc.). To keep things simple, consider limiting your **action plan** to a period of no more than **1 year** (in fact many organisations refer to their action plan as a "**year plan**").

Have a look at how an action plan for the examples provided could look like in practice:

Example 1:

Objective: To increase the participation of young Roma women to a minimum of 20 per year in each separate Erasmus+ and European Solidarity Corps programme.

Step	Task	Person	Start Date	End Date	Progress	Cost
	What will be done?	Who will do it?	From when?	By when?	How close are you to completing it?	Money or time
1	Research organisations that with work young Roma women	Ana	Jan/10	Mar/31	75% complete	25 hours
2	Developing program-me for ne-tworking day	Lucy	Feb/01	Mar/31	50%	10 hours

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

The example demonstrates how an **objective can be broken down into specific tasks**. Each task should also be delegated to the most appropriate staff member. Next, the tasks are put into a clear timeframe. An estimate of the cost of each task is included as an extra guideline.

The plan also leaves space for an update on progress which will indicate how close each task is to completion.

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

Each separate objective should have its own separate action plan. Although it sounds like a lot of work, separate action plans are needed to clearly outline what should be done and who should be doing it. When the separate action plans are compared against one another, it is easy to see if different objectives are competing or overlapping with one another (for staff time or other resources). This is also a **good way to judge if you can realistically achieve your objectives within the time defined.**

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

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

Be aware that some people in the National Agency may resist the idea of using this kind of action plan. Not everyone likes to feel that they are being controlled or regimented to such a degree. The aim of an action plan is definitely **not** to restrict people's creativity or flexibility. **An action plan is a guideline and is meant to clarify who is doing what within a specific period of time**. One good way to get people enthusiastic about action plans is to actively involve them in the process.
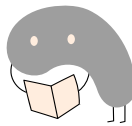
More tools can be found in the Tool Library

MILESTONE 2:
Doing the work

The time has come to move from the drawing board to action: Strategy is not just about coming up with plans, but also about doing the work of inclusion and diversity on all levels and in all areas of National Agencies.

Like many other things, inclusion work requires a lot of trial and error and strategies that work in one place or with one specific

group might not work elsewhere. Yet, we can look towards the work of other National Agencies for inspiration of how they put their action plans into reality:
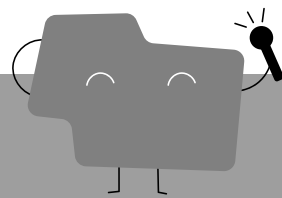
LEARNING FROM THE EXPERIENCE OF OTHERS

Italy: *"People that come from a background of fewer opportunities, they really face different kinds of barriers which are not always visible. For example, I experienced young people who decided to suddenly leave the programme because they were scared to face their own difficult reality. To support them, you need time, preparation and expertise. You need youth workers that can deal with these kinds of topics."*

Romania: *"Having established targets really helps assessing our work. We have inclusion indicators and we reached or exceeded them."*

Germany: *"You should not wait for organisations who reach more diverse audiences to come to you... you need to go out there and meet them where they are at and learn more about their world and their needs."*

Belgium Flanders: *"We try to be very approachable and we go the extra mile. As staff, we see it as our task to really assist organisations as much as possible. We go and meet the organisations and hear about what they do. Then we*

translate the programme for them, present it in a way that really relates to their reality. During the application period, we give feedback on their drafts. We don't tell them what to write, but we try to ask questions that help them elaborate more. Sometimes our supportive approach also means calling them before the deadline and giving them the last bit of motivation to really submit."

Ireland*: "We have a project directory in which we share best practices from successful projects. There we include a lot of examples of inclusion projects and promote them. We also bring these real examples to our workshops. There's nothing better to promote inclusion than sharing these examples. And we make sure it's about dividing it into examples of inclusive and non-inclusive projects, we simply always pick out diverse and inclusive projects to showcase. Like this we make it clear from the get-go that Erasmus+ or European Solidarity Corps projects are inclusive."*

Finland*: "We have used the Erasmus+ accreditation process as a promotion tool for inclusion. For accredited organisations it gets easier due to the shorter planning phase and since funding for inclusion efforts is already secured."*

Ireland*: "We also applied the strategy to our communication. When we created a new website, part of the planning was to make sure that we would have as much representation on the website as possible, so people would see that what we offer is relevant for a wide and diverse range of people."*

Romania*: "It's important also to "narrow" your perspective a bit and look at groups that you'd like to reach specifically, given the national reality. We have done specific work looking at how to reach organisations that work in rural areas, with people with disabilities and with the Roma community. All the audiences have their own challenges. It's challenging to address organizations. So we did specific trainings on how to write the project for each group."*

MILESTONE 3:
Monitoring

Despite all the effort in defining objectives and creating action plans, it is still very easy for a strategy to get off track. **There are many internal and external circumstances that could impact your strategy**. For example, staff turnover within the Agency could mean that it is no longer possible to achieve certain tasks within the defined time frame. Key inclusion project promoters may decide they no longer wish to take part in Erasmus+ activities. **Economic and/or political changes may seriously affect specific profiles of people with fewer opportunities** - creating new barriers for participation. Many of these changes cannot be predicted in advance.

Drastic changes to a National Agency's situation does not necessarily mean the end of your strategic plan. plan. They do however, demonstrate the **importance of keeping on top of your strategy at all times**. This requires active management. This process is often referred to as monitoring.

Monitoring is the systematic collection and analysis of information as your strategy progresses. Monitoring helps to keep the work on track and can let the strategy team (or management) know when things are going wrong. It enables you to determine whether the resources you have available are sufficient and are

being well used, whether the capacity you have is sufficient and appropriate, and whether you are doing what you planned to do[8].

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

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

TIPS

One simple way to prepare monthly review meetings is to use the "traffic light" method which indicates and charts your progress. For example, if you are half-way through a year where your objective is to increase the participation of rural youth to a total of 50 young people and to date you have included 25, the status of this target is "green". If, by contrast, you have included 18 then the status is "yellow" and the point needs to be discussed at the next meeting. If, however, you have only included 10 young people, then the status is "red".

This indicates that urgent action is required or that the desired result has become impossible to achieve[9].

---

[8]Janet Shapiro. A series of toolkits produced for CIVICUS World Alliance for Citizen Participation to enable organisations to build their capacity and achieve their goals. These and other toolkits in the series can be found at www.civicus.org.
[9]Andy Bruce & Ken Langdon, Strategic Thinking, 2000.

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

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

- **Reporting** the current status of your strategic plan regularly to the strategy team, the director, as well as to the rest of the staff in the National Agency. Don't demotivate people with pages and pages of information. Give only as much detail as people really need.
- **Recognising** and rewarding the team regularly for the hard work they put in to complete their tasks. This will help to keep people enthusiastic and committed to the strategic plan as a whole.

TIPS

Effective monitoring of an inclusion strategy requires a combination of flexibility to deal with the unexpected and authority to keep people on track, on schedule and on budget[10].

A National Agency needs to be ready to respond creatively to new developments in inclusion without constantly having to redraft. At the same time, the office requires strong guidance to make sure each member of the team remains committed and focused on their targets.

---

[10]Erica Olsen. Strategic Planning for Dummies, 2007.

Dealing with change

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

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

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

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

DO'S AND DON'TS OF THE IMPLEMENTATION PHASE

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

DON'T	DO
Limit the responsibility 'for implementation.	Encourage ownership of the strategic plan throughout the entire team by giving each person a role to play.
Forget the importance of communication.	Present and explain the strategic plan and its specific objectives clearly to the rest of the National Agency staff so they know how they are expected to contribute.

Separate the inclusion strategy from other tasks.	Make the inclusion strategy an integral part of the National Agency's daily work.
Underestimate the need for updates.	Produce regular progress reports so that the entire team knows the current status of the strategic plan.
Miss out on opportunities to motivate members of staff.	Empower staff members by giving them the authority, responsibility and tools necessary to impact their own area of work.
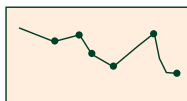
LEARN MORE

Strategic Planning for Dummies, *Erica Olsen:* <u>*https://tinyurl.com/yawxv4ys*</u>

Strategic Thinking, *Andy Bruce & Ken Langdon, Dorling Kindersley Ltd, 2000.*

Action Planning, *Shapiro, Janet:* <u>*https://www.civicus. org/view/media/Action%20Planning.pdf*</u>
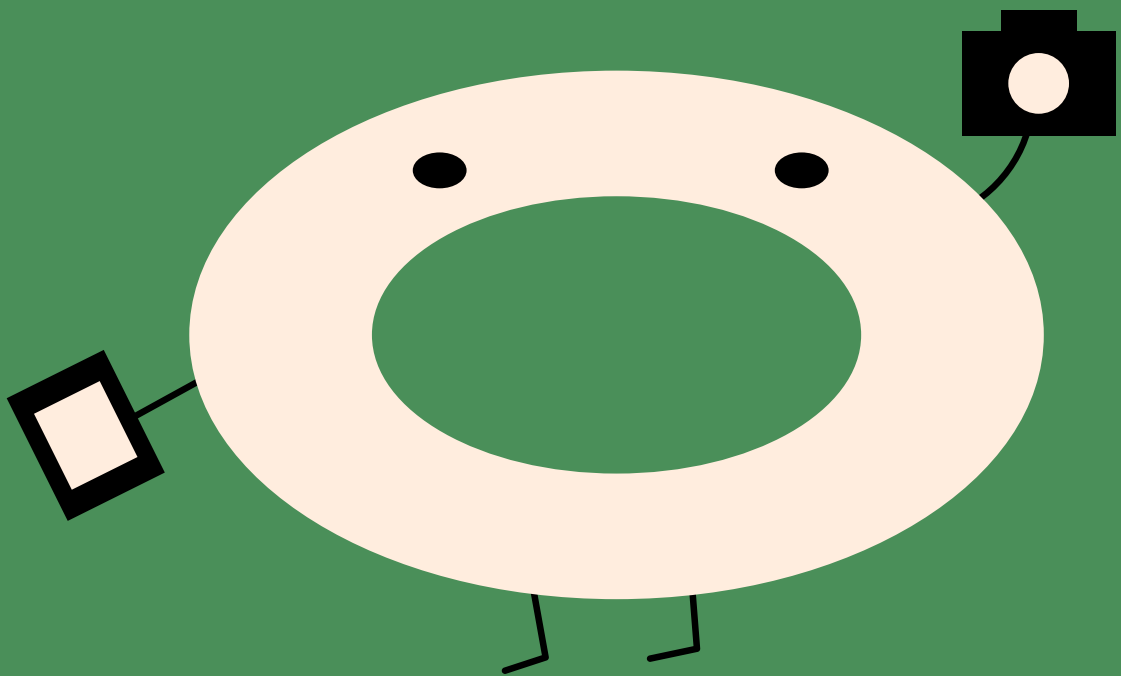
THE EVALUATION PHASE

Listen to Episode 7 of the "Shaping Inclusion and Diversity Podcast" to hear about the challenges and opportunities of evaluating inclusion and diversity efforts.

WHAT IT IS

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

Evaluation is most effective (and arguably most enjoyable) when you have taken time in advance **to plan what kind of progress and achievements** you hope to see. In order to evaluate properly, you should establish a **baseline (starting point)** which gives a clear overview of the situation before you began working on your inclusion strategy.

For instance, if your objective is to increase the participation of young people in NEET situation in Erasmus+ and European Solidarity Corps programmes by 50%, you need to know what their level of participation was beforehand. If you invested the time required for a thorough needs analysis, your National Agency should have established such a baseline thanks to the work done in the early stages.

It can be useful to stop and take time to understand the purpose of your evaluation before you get started. Ask yourself:

- **Why are you carrying out an evaluation?** After investing so much time and resources in this work, you should be curious to know the real results and whether it has been effective or not. You should also be interested in learning from all the experience gained and hopefully you are interested in sharing the outcomes with others. Generally speaking, it is good practice to evaluate your inclusion strategy even if you are not obliged to do so.

- **What is the evaluation for?** Your evaluation should be designed for a specific purpose because this will determine what you will try to measure and what data you need to collect. For instance, if your purpose is to produce statistics on participation levels, you will use different methods than if you were to measure cost-effectiveness.

- **Who is the evaluation for?** The profile of your audience will affect your approach to your evaluation. For example, is your evaluation meant for internal purposes only or do you need to show your results to clients, funders, politicians or the media?

- **When does the evaluation need to be completed?** Knowing your timetable will help you to structure your evaluation. For instance, will you evaluate continuously, at a halfway point or only towards the end of the period defined in your strategic plan?

TIPS

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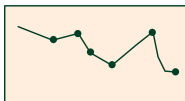
LEARN MORE

Monitoring and Evaluation, *Janet Shapiro: https://tinyurl.com/uhdw6yuk*

Safer Communities Programme - Evaluation: A guide to basic evaluation, *UK Home Office Publication: https://tinyurl.com/ufuzuc3s*

MILESTONE 1:
Doing the evaluation

When it comes to inclusion, there are three main areas for National Agencies to consider in the Evaluation phase:

- The **results** of your inclusion strategy
- The **impact** of your inclusion strategy
- The **process** of your inclusion strategy

Looking at these areas will give you a complete picture of how successful your inclusion strategy has been.

Evaluating results

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

You will very quickly see whether or not your objectives have been met if you identified SMART objectives in the Planning phase In fact, you will likely have seen this already during your monitoring in the Implementation phase.

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

Evaluating impact

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

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

Evaluating the process

Very often organisations forget to pay attention to evaluating the **process** involved in developing their strategy. Depending on your approach to strategy-making, evaluating the process will likely mean taking a close look at the **internal procedures and decision-making processes within the team**. It could also mean evaluating other aspects such as communication between the strategy team and the rest of the National Agency, the role of individual team members and the contribution of external stake-holders, etc.

Some **general guideline questions** to help you get started could include:

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

Structuring the evaluation process

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

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

There is a wide variety of methods and techniques available that National Agencies can use to help with the preparation and design of evaluation, as well as for collecting and interpreting infor-

mation. The methods you choose will depend on the scope and duration of your strategic plan as well as on the resources available to you in your National Agency.
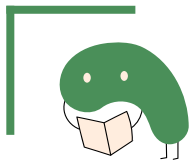
For concrete tools to use for the Evaluation, check out the Tool Library.

Milestone 2:
After the evaluation

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

• **Learn from the process** – by learning what has worked and what did not, what you did right and what you did wrong, your National Agency is empowered to act in an informed way in future work.

• **Report to your key stakeholders** – it is likely that the individuals, groups and/or organisations that played a role in your inclusion strategy will be highly interested to know what the specific outcomes were.

• **Decide how to move forward** – take stock of what is now going on in inclusion. Is it time to define new priorities and objectives? Is a new needs analysis necessary?

What to do with the results

After thoroughly evaluating their inclusion strategies, **it makes sense for National Agencies to publicise the results as widely and as often as possible**. This is usually called the dissemination of results. In essence, this means that one of the final tasks in the inclusion strategy is for National Agencies to share the outcomes, both good and bad, with the appropriate audiences.

There is a variety of methods National Agencies can use to disseminate the results of their inclusion strategy including:

- **Documenting** – record the most essential outcomes for the strategy team and the rest of your colleagues in the National Agency.
- **Publishing** – spread the results to a wider audience. Consider using a variety of tools including reports, brochures, websites, newsletter articles, Youthnet, etc.

- **Participating** – take part in relevant meetings and events and take the opportunity to present your strategy and its results whenever possible.

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

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

Milestone 3: Celebrate

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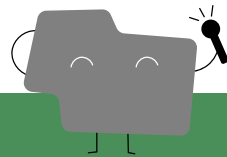
LEARNING FROM THE EXPERIENCE OF OTHERS

Ireland: *"Targets and numbers are important. But you need to also remember that each sector is different. You cannot just extract information. We believe in building relationships to really understand the barriers and see if they have been removed."*

Belgium Flanders: *"We evaluate each programme cycle and each event and we take the feedback into account for the next ones. But it's important to also have a more thorough evaluation once in a while, going into depth and seeing connections between different areas."*

DO'S AND DON'TS OF THE EVALUATION PHASE

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

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

LEARN MORE

Impact Tool for Erasmus+*: www.erasmusplus.nl/en/im-pacttool-mobility*

Asking good questions: a framework for learning, evaluation and continuous improvement*, The Centre for youth impac: https://www.youthimpact.uk/sites/default/files/2020-11/asking_good_questions_-_guide_and_workbook_v1-2019.pdf*
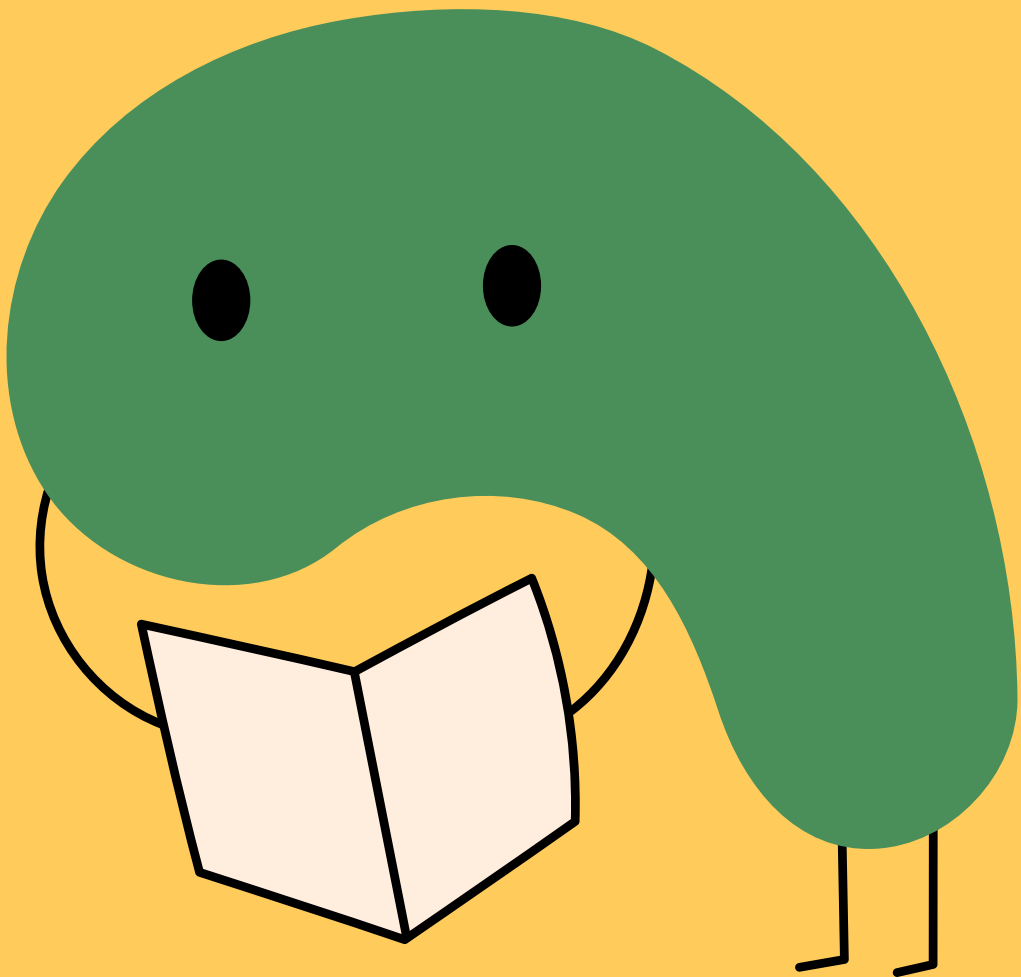
TOOL LIBRARY

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

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

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

TOOL FOR ANALYSIS PHASE

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

STEP 1 - For the last five years, provide statistics for the following categories for all Actions of the Erasmus+ and European Solidarity Corps programme:

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

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

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

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

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

Stakeholder Analysis

An important aspect of the needs analysis is **identifying key stakeholders and taking time to understand their position**, their needs and what they expect from the National Agency. A stakeholder is an individual or group who has an interest in or who might be impacted by your strategy.

STEP 1 - Brainstorm a list of all the National Agencies stakeholders (remembering that stakeholders can be clients, competitors or partner organisations). Split the list into internal stakeholders (inside the National Agency) and external stakeholders (outside the National Agency).

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

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

- What do you need or expect from the National Agency?
- What criteria do you use to judge our work?
- How well has the National Agency performed against those criteria (excellent, very good, fair, poor… over the past year, 2 years, 3 years…)? Why would you give the National Agency this rating?
- What do you need the National Agency to do more or less of?
- If resources were available, what additional activities or services should the National Agency offer?
  Adapted from Worksheet 4 – Support Center for Nonprofit Management (1997).

Organisational Self-Assessment

The organisational self-assessment can help you understand how your organisation is doing in terms of diversity and accessibility. Ideally, fill it out together with your team to discuss answers, making sure everyone can share their perspective. You can also distribute the questionnaire for the team to fill it out individually and then compare answers.

You can find the questionnaire in the Annex of the "Embracing Diversity" publication of Salto Inclusion and Diversity. You can access it here: www.salto-youth.net/embracingdiversity

Close-up on the competition

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

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

Competitors are not your enemies and gathering information about them is not "spying". Much of the information you need to complete this exercise can be found in public information like an organisation's annual report, publicity materials or on their website. The easiest way to get information is simply to ask for it – most organisations will be happy to meet with you to talk about their strategy and activities, especially if you return the favour.

When doing your research, be sure to always respect people's boundaries (e.g. do not push for internal information like finances, etc.)

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

12. What conclusions can be drawn? What type of action is needed to improve the National Agency's position compared to its competitors?

PEST Analysis

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

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

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

STEP 3 - Identify potential opportunities and threats for the National Agencies under each heading and list them on a flipchart paper.
(*) Depending on the time available, you can consider adding additional categories like Health, Law, Environment, Lifestyle, Education, etc.

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

TOOLS FOR THE PLANNING PHASE

SWOT Interplay

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

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

Strengths	Weaknesses
Opportunities	Threats

Where strengths meet opportunities, you need to **INVEST**	Where strengths meet threats, you need to **DEFEND**
Where weaknesses meet opportunities, you need to **DECIDE**	Where weaknesses meet threats, you need **DAMAGE CONTROL**

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

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

- Where your strengths meet opportunities, this is the area where the National Agency is strongest. This is where you should **invest**.
- Where your strengths meet threats, the National Agency must consider how to best use its resources to protect itself and its activities. This is where you should **defend**.

- Where your weaknesses meet opportunities, the National Agency risks missing out on valuable chances in inclusion. Here you should **decide** (e.g. will you invest further, pull back, or find a way to cooperate with others?)
- Where your weaknesses meet threats, this is the area where the National Agency is most fragile. This is where you should **control the damage**.

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

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

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

Example 2

On one side the National Agency offers young people a wide variety of projects where they can go abroad as an ESC volunteer (strength). On the other side a competing organisation offers similar short-term voluntary activities abroad and can find the young person a placement in less than half the time that the National Agency can (threat)... The National Agency should mobilize to investigate ways they can improve their internal selection and placement procedures.

Example 3

On one side a focus group of young people with fewer opportunities aged 13-18 shared that the National Agency's promotional brochures and booklets were unappealing and ineffective (weakness). One the other side these same young people are avid users of social media. The National Agency should decide whether to reduce their use of printed materials and to increase advertising via social media.

Example 4

On one side the number of early school leavers participating in the National Agency's activities has been steadily dropping over the last 5 years (weakness). On the other side national-level funding for early school leavers has been diverted towards formal training courses and may no longer be used for non-formal activities (threat)... The National Agency needs to control the damage by assessing the feasibility of either increasing the participation of school leavers in programs or focusing on other groups of young people.

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

Paired comparison analysis

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

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

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

- Potential actions which are **internal** (any action related to improving the National Agency's productivity or efficiency in inclusion, like hiring new staff, offering internal training, improving systems and procedures, investing in technology, etc.);

- Potential actions which are **external** (any action related to improving the impact of the National Agency's inclusion work, like contacting new audiences, developing new activities, partnering with other stakeholders, etc.)

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

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

	Potential Action A	Potential Action B	Potential Action C	Potential Action D	Potential Action E
Potential Action A	-				
Potential Action B		-			
Potential Action C			-		
Potential Action D				-	
Potential Action E					-

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

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

Evaluating your strategic plan and the planning process

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

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

The Strategic Plan (YES/NO)

- Does the strategic plan provide guidance on both short-term and long-term priorities for inclusion?
- Does the strategic plan help the National Agency to allocate its resources?
- Is the strategic plan understandable by people who have not participated in the development of the plan?
- Does the strategic plan respond to the National Agency's best understanding of its internal and external environments?
- Was the strategic plan developed on the basis of a consensus and commitment-building process?
- Has the strategic plan been formally adopted by the head of the Agency and/or the Board of Directors?
- Comments and suggestions for future strategic plans:

The Planning Process (YES/NO)

- Did the Planning process meet the criteria?
- Was the process itself consensus building?
- Did the process offer a way to bring up the needs and interests of all stakeholders?
- Did the process allow sufficient time to reach agreement on what is best for the long-term and short-term interests of the National Agency in the field of inclusion?
- Did the process allow sufficient time to weigh and assess different options?
- Did the process allow each stakeholder who needed to be involved to play an active role in the process?
- Did the process provide participants with tools to successfully go through the different steps in the planning process?
- Comments and suggestions for future planning processes:
Adapted from Worksheet 10 – Support Center for Nonprofit Management (1997).

Eisenhower Matrix

The Eisenhower Matrix, also referred to as Urgent-Important Matrix, helps you decide on and prioritize tasks by urgency and importance, sorting out less urgent and important tasks which you should either delegate or not do at all. The main idea in the model is to be able to prioritize tasks by urgency and importance, and, then, see how to act specifically in each one of them.

	URGENT	**NOT URGENT**
IMPORTANT	Do First	Schedule
NOT IMPORTANT	Delegate	Avoid

The first quadrant (upper left) is the "Do First" - which means that these are the most important tasks to be completed. Try your best to do them. The second quadrant (upper right) is the "Schedule" - they are very important, but not so urgent, which means that you can schedule them for later. The "Delegate" quadrant will have tasks that are urgent, but not so important. For these tasks it is important to ask for help. And lastly, on the "Avoid" quadrant, you will find tasks that are not that important and also not urgent. One suggestion is to use post-its to write your tasks, therefore you can move them once you see the big picture of all the tasks that need to be done in the strategic plan.

TOOLS FOR THE IMPLEMENTATION PHASE

Outline of an action plan

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

ACTION PLAN

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

Step	Task	Person	Start Date	End Date	Progress	Cost
	What will be done?	Who will do it?	When?	By when?	How close are you to complete it?	Money or Time

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

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

Monitoring the strategic plan

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

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

Written below is a to do list when monitoring your strategic plan:

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

Previous strengths	Current strengths
Previous weakness	Current weakness
Previous opportunities	Current opportunities
Previous threats	Current threats

5. Indicate which changes need to be made in:

Long-term priorities	Short-term priorities
Programme and Management/	(Programme and Management/
Operations and Objectives)	Operations Goals and Objectives)

TOOLS FOR THE EVALUATION PHASE

Overview of results achieved

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

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

Example

Overview of results				
Priority	Objective/ Desired results	Progress	Reason for non-ac-complishment (if applicable)	Next steps
1				
2				

- **Objective/Desired result** – indicate the objective and desired results that were developed in Step 3 of the Planning phase. You should keep the same text that was used in the strategic plan.
- **Progress** – indicate the extent to which the objective and desired results have been achieved (It can be useful to express this in terms of percentage – 50% complete, 75% complete, 100% complete).
- **Reason for non-accomplishment** – for any objectives/
- results not 100% achieved indicate the reasons why as
- well as any internal or external factors which may have
- played a role.
- **Next Steps** – outline the specific action(s) which will now be taken.

Final review of the strategic process

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

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

The following questions should be used as a starting point for this work – feel free to expand the lists below in order to evaluate other areas of the strategic process.

1) The Analysis phase (YES/NO)
- Did the strategy team carry out a needs analysis?
- Was the needs analysis effective and efficient?
- Did the needs analysis provide enough information about the National Agency's situation in terms of inclusion (i.e. strengths and weaknesses, opportunities and threats)?
- Did the needs analysis provide enough information about the needs of young people with fewer opportunities (in general or in terms of specific groups)?
- Did the needs analysis provide enough information on the needs and expectations of project promoters?
- Did the needs analysis provide enough information about the National Agency's competitors in the field of inclusion?

- Did the needs analysis provide enough background information to enable the strategy team to make decisions?
- Comments and suggestions for the future:

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

3) The Implementation phase (YES/NO)
- Did the strategy team make regular use of action plans?
- Did the action plans serve to "operationalize" the strategic plan?

- Did the action plans allow room for flexibility, creativity and self-management by staff members?
- Was the strategic plan monitored and reviewed regularly?
- Were all key stakeholders actively involved in the implementation of the strategic plan?
- Was the status of the strategic plan regularly communicated to all members of staff?
- Were team members recognised and rewarded for reaching key targets?
- Comments and suggestions for the future:

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

General conclusions:

1)

2)

3)

Recommendations

1)

2)

3)

Booklet Author

Rahel Aschwanden (Author)

https://nowornow.org/about-us/#team

Since 2007 Rahel acts as trainer and facilitator in non-formal education. In 2016, Rahel co-founded the Swiss organisation NOW that aims at exploring "inter-diversity learning" - using diversity as a learning tool to promote solidarity and changemaking among young people and adults. Today, Rahel works as a learning designer and consultant for NOW's sister organisation Instituto NOW with a strong focus on promoting the development of 21st Century Competences.

Contact: rahel@institutonow.org

Editorial Information