INCLUSION
BY DESIGN

A practical booklet to help NGO's approach inclusion in a strategic way

Download this and other SALTO Inclusion booklets for free at:
www.SALTO-YOUTH.net/InclusionStrategyBooklet/

INCLUSION FOR ALL!
WWW.SALTO-YOUTH.NET

SALTO-YOUTH
INCLUSION
RESOURCE CENTRE

Education and Culture

INCLUSION
BY DESIGN

SALTO-YOUTH STANDS FOR...

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

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

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

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

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

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

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

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

TABLE OF CONTENTS

CASE STUDY – YOUTH ORGANISATION ″ABC-KIDS″

The youth organisation ABC-Kids was founded 15 years ago by a **small group of people with a big idea**. This group saw that young people living in the inner-city had few things to do outside of school hours and nowhere to spend their time. As a result the young people were at risk of falling under negative influences on the streets. The group decided to try to **provide more activities** for these young people and developed a series of low-cost activity programmes. Their **vision** was to create a space where young people of all backgrounds and skill levels could come to spend their free time. Today, ABC-Kids is a highly respected organisation with an 8-member volunteer board and 6 paid staff members. They are one of the most active providers of youth recreational activities in the entire city. ABC-Kids has an **excellent reputation** on both local as well as on national level.

From No Offence

Although it seems that everything is going well on the outside, the director of ABC-Kids knows better. The organisation's situation is **changing rapidly** and the director has her hands full trying to cope. In the past, ABC-Kids had waiting lists for virtually every one of their activities. Nowadays the **number of registrations** has dropped, for some activities as much as 60%. Not so long ago ABC-Kids was the only youth organisation in the city offering recreational activities to children. Now there are **at least five other organisations** offering similar programmes at substantially lower costs. When the organisation was first founded, the **profile** of the young people coming to ABC-Kids was fairly homogenous. Nowadays the inner-city population has been **transformed** and you can meet people of every ethnicity and religious background. Some of these young people are having difficulties in school, others are unable to find work and many are attracted by the idea of making easy money through criminal activities. Previously, a large part of the ABC-Kids programme was **subsidized** by grants from the city council. Due to **budget cuts**, this funding will stop as of next year. Early in its history the activities in ABC-Kids were proposed and carried out by **volunteer** activists (many of them older children from within the organisation). As time has gone by, responsibility for much of this work has been taken on by the **paid staff** and as a result many of the young activists have drifted away from the organisation.

While virtually everyone in the organisation has a theory about what is causing these changes and what the impact will be on the long term, no one really knows for sure. The last time ABC-Kids took time to thoroughly examine either their programme of activities or what is happening in their inner city district was over 5 years ago.

The director knows that there are **no simple solutions** to all these issues. She knows that action needs to be taken but she **doesn't know where to start**. How can she best take steps to overcome all the different challenges facing ABC-Kids?

INTRO

DUCTION

WHY THIS BOOKLET?

ABC-Kids is not a real youth organisation. It is a fictitious example yet it **highlights** many of the real problems facing youth organisations in Europe today.

Over the last decades, the youth sector has undergone **many changes**. Nowadays youth organisations are expected to **do more than just provide activities** for young people in their free time. They are being relied upon to teach young people skills and competencies which are not adequately being learned in schools. They are regularly called upon to provide alternative forms of learning for those young people who do not easily fit into the regular education system. They are also becoming more and more **formalised**. Youth organisations are being asked to **professionalize**, to account for how their resources are used and to work on a more cost-efficient basis.

Young people are also struggling to exist in a fast-changing world. Young people in Europe today face high unemployment rates, a decrease in the equality of opportunity in education as well as social marginalisation and increasing discrimination. Every young person faces considerable challenges as they grow to independence and adulthood. Some individuals are able to meet these challenges but many others lack the skills needed to do so.

You may recognise these issues from your own work in a youth organisation. The challenges described above can be difficult to deal with no matter what your organisation's profile. If you are a small organisation, if you have a minimal operating budget, if you work with hard-to-reach young people or if your youngsters face serious difficulties in their lives, then your situation is that much more complicated.

Rather than be overwhelmed by complexity, youth organisations need **tools** to help them deal with it **effectively**. One way to do this is for organisations to start to learn how to think and act more **strategically**.

WHO IS THIS BOOKLET FOR?

"Inclusion by Design" is for project officers or youth workers "on the ground" who recognise the need for more structure and planning in their daily work. It can also be used by directors, managers, policy developers and others in charge of steering the direction of their youth organisation. This booklet is meant for anyone interested in learning more about how a **strategic approach** can help to improve the quality and impact of their inclusion work.

This booklet specifically targets **"newcomers" to strategy**. It will examine the basic concepts behind strategy development and present them in a **user-friendly way**. By doing so, we hope to erase some of the negative stereotypes surrounding the concept of strategy, to make the idea of strategic thinking more **attractive and accessible** and to demonstrate how strategies can be developed in any context. If you are already a strategy "veteran", many of the concepts in this booklet will probably be familiar to you. Nevertheless, we encourage you to read through the following pages. If anything is certain in the world of strategy (and the world of inclusion, too!) it is the fact that there is always something new to learn.

From Flickr.com

JUST ANOTHER STRATEGY BOOK?

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

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

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

When it comes to inclusion, an individualized approach usually works best. The same is true when developing a strategy. "Inclusion by Design" is by no means the final word on strategy and it is not meant to be used as a recipe book. The approaches outlined here can help you get started but it is up to you to decide which methods and implementation **will best suit your organisation**.

Why is there a need for a special focus on inclusion strategies? Just what is meant by "inclusion", anyways? What is it and who is it for? The next section will look at these and other questions in more detail.
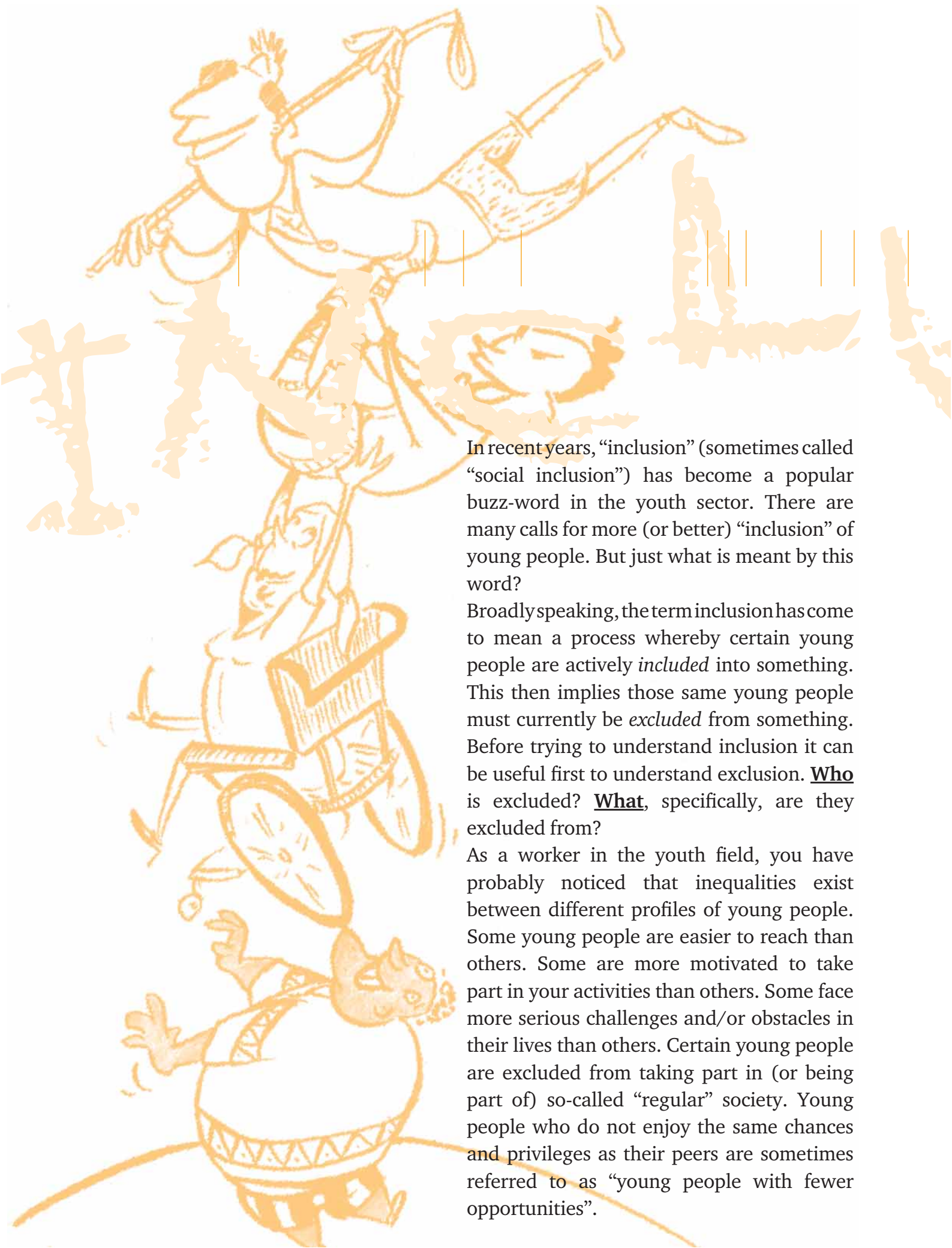
In recent years, "inclusion" (sometimes called "social inclusion") has become a popular buzz-word in the youth sector. There are many calls for more (or better) "inclusion" of young people. But just what is meant by this word?

Broadly speaking, the term inclusion has come to mean a process whereby certain young people are actively *included* into something. This then implies those same young people must currently be *excluded* from something. Before trying to understand inclusion it can be useful first to understand exclusion. **Who** is excluded? **What**, specifically, are they excluded from?

As a worker in the youth field, you have probably noticed that inequalities exist between different profiles of young people. Some young people are easier to reach than others. Some are more motivated to take part in your activities than others. Some face more serious challenges and/or obstacles in their lives than others. Certain young people are excluded from taking part in (or being part of) so-called "regular" society. Young people who do not enjoy the same chances and privileges as their peers are sometimes referred to as "young people with fewer opportunities".

WHAT IS INCLUSION?

WHO ARE YOUNG PEOPLE WITH FEWER OPPORTUNITIES?

This term includes young people from many different backgrounds. "Young people with fewer opportunities" are youngsters who **face some form of exclusion** in their lives. For example, some young people may live in isolated regions or in economically disadvantaged areas where they have limited access to information. Young people with a physical or mental disability may have specific needs which cannot always be provided for. Some youngsters from minority ethnic or religious backgrounds may face racism and discrimination which blocks their access to facilities, institutions or programmes. Others, like early school leavers or those with emotional or social problems, may not have the maturity or social skills necessary to cope with living on their own or holding a steady job.

This is only a short list of the types of exclusion facing young people with fewer opportunities. In certain contexts, situations or specific **obstacles** can prevent young people from having effective **access to formal and non-formal education**, to **mobility**, to **participation**, to **political representation**, to **active citizenship**, to **empowerment** and to **inclusion** in society at large.

From Flickr.com

Each of the profiles of young people de-scribed above has their own specific needs but the one characteristic they share in common is that they are unlikely to be able to overcome the challenges they face without some form of additional support.

For the purposes of this booklet, inclusion can be understood as the process of helping young people to overcome specific challenges and barriers in order to move forward in their lives.

Inclusion is a long-term process which is made up of many steps and achieves many goals (large and small) along the way. In practice, inclusion is highly **individualized**. It can take different forms and depends partially on the context of the work being done. Unfortunately, there is no magic formula to achieve inclusion; the **process is ongoing** and there is often no clear end point or "finish line".

COMMON CHALLENGES IN INCLUSION WORK

If solving the problems of fewer-opportunity young people was easy, it would have been done already. If the achieving inclusion was simple, there would be no need for this booklet. Inclusion is by no means a **clear-cut process**. Even the most experienced youth organisations face serious challenges when it comes to improving the situation of fewer-opportunity young people. Some of the most common **challenges** in the field of inclusion work include:

- **Reaching the young people** – although organisations often make great efforts to make their programmes as accessible as possible, there are no guarantees that the young people will use them. Some young people may not be interested in what is on offer, some may not even know it exists and some may not trust an organisation's motives. This means that organisations must constantly come up with alterative ways of making contact with young people, especially if they are from severely excluded groups.

- **Finding time for individual attention** - many youth organisations deal with large numbers of young people on a daily basis. In such cases, it is not easy for a youth worker to take time away from the larger group in order to focus on the inclusion needs of an individual, yet this is often precisely what is needed to give a young person a substantial boost in the right direction.

- **Taking inclusion for granted** – professionals working with fewer-opportunity young people often presume that these youngsters want to be "included" but this is not always the case. Do the young people want to be included or is it the organisation who wants to include them? Are the young people interested in being included in the things the organisation is proposing? If not, the inclusion work can quickly run into problems.

- **Treating symptoms rather than the disease** - in some European countries, the bulk of resources in the youth sector are used for crisis management rather than for prevention or educational activities. This means there is a risk that *more attention is focused on immediate problems than on their underlying issues*. For instance, if a young person gets caught drunk driving by the police, their organisation will likely put in a lot of effort to keep them out of jail. This solves the immediate problem (jail), but it does not deal with the larger issue (the abuse of alcohol and the reasons behind it).

- **Working on a reactionary basis** - youth workers are often forced to make decisions "from the gut"- that is to say, to use their own instincts and large doses of common sense to deal in their work with young people. This means they are functioning on a *reactionary basis* (reacting to situations as they come up). By *reacting* to situations rather than *creating* them, youth workers operate from a relatively weak position. Working on a reactionary basis often means that youth workers do not have the time to stop and consider the bigger picture or the long-term view.

- **Dealing with complex profiles** - fewer-opportunity young people often face a combination of problems which makes their situation extremely complicated. It can be difficult for a youth worker to know which problem needs to be tackled first and how this should best be done. The more difficulties a young person faces in their life, the greater their need for a longer-term systematic approach to help them overcome their specific issues.

This list is far from complete but it does give an idea of the kinds of obstacles youth organisations deal with regularly in their inclusion work.
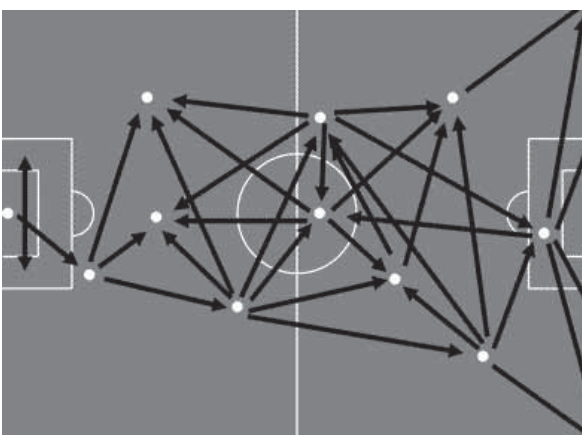
The good news is that it is possible to move from a *reactive* to a *proactive* working style. To make this move, youth organisations need to adopt a new mind set and a new way of approaching their inclusion work. If your organisation wants to help your young people to take more substantial steps forward then developing an inclusion strategy may be the right thing for you.

From Flickr.com

HOW DO I KNOW IF MY ORGANISATION NEEDS AN INCLUSION STRATEGY?

Despite the many needs of fewer-opportunity young people and the many obstacles facing youth workers in this field, it is not easy to persuade people to sit down and work out inclusion strategies.

It is quite natural to be sceptical about strategy development. Many organisations and institutes function quite nicely without any kind of strategy (or at least it looks that way!) With so little time and resources available, developing strategy can seem like an unaffordable luxury.

For youth workers, the idea of making an inclusion strategy can be particularly hard to swallow. Depending on the profile of young people you are working with, being asked to make a strategy can feel like being asked to predict the unpredictable and to manage the unmanageable. So how do you know if your inclusion work really needs a strategy?

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

- Someone asks you what your organisation plans to **achieve in the coming year** concerning inclusion and you don't have an answer. You ask your colleagues the same question and they all give totally different answers.
- You have a **vague idea** what you would like to do in terms of inclusion work in the coming year but you have no idea _how_ you will do it.
- You don't have a clear idea of which organisations/institutions are your **partners** in inclusion and which are your **competitors**. When a funder asks about the added value of your inclusion activities, you don't have a good response.
- You are presented with a new opportunity (e.g. a new activity, a new funding line, a new partner, etc.) and you don't know how to decide whether it is something you should pursue. You normally pursue **every new opportunity** for fear that you will miss out on something big.
- There are inconsistencies in your **information** on inclusion (your printed materials, website, etc.) You can't understand the content and neither can anyone else, least of all the young people you work with. Whenever you try to explain your inclusion plans to colleagues or external partners you tell a **different story**.

- Your inclusion plans for the coming year are defined by **one or two persons** in your office. External partners and young people themselves play no part in the process.
- You ask your colleagues what **"success"** in your inclusion work should look like and they find it difficult to answer.

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

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

If you recognise yourself or your organisation in any of these descriptions, keep reading. The next section of "Inclusion by Design" takes a closer look at the concept of "strategy" along with the different phases, advantages and disadvantages involved in the strategy- making process.
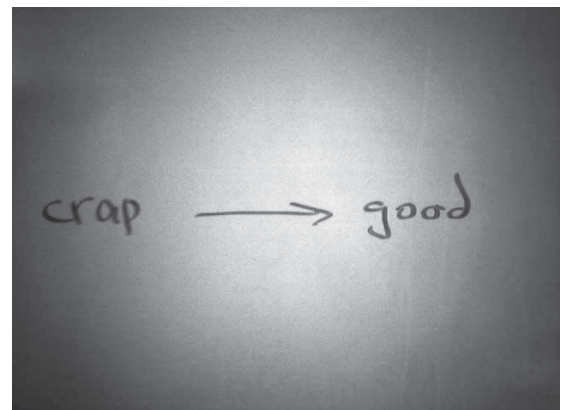
From Flickr.com

QUIZ – ASSESS YOURSELF

How do you think your organisation measures up when it comes to inclusion strategies? Would you describe your organisation as **"strategically-minded"**? Use the quiz questions below to help you decide whether or not your organisation needs to organise a strategic planning process.

Answer the questions as honestly as you can. Score your project or organisation as follows on each statement:

1 = Definitely
2 = Maybe/Not sure
3 = Definitely not

Where a statement has two parts and you would answer "definitely" to one part but not to the other, go with the weaker response. So, for example, in the first statement, you may answer that your organisation "definitely" has a clear vision, but you may not be sure whether there is consensus about the vision. Your response then is "not sure".

Options

1 = Definitely
2 = Maybe/Not Sure
3 = Definitely Not

Statement		1	2	3
1	My organisation has a clear vision of what it wants to achieve in terms of inclusion and there is consensus around this vision.			
2	Value issues are often discussed in the organisation and there is agreement on the values base of the organisation			
3	The current mission statement of my organisation reflects clearly what the organisation does, for whom, and why it is important.			
4	My organisation regularly reflects on its strengths and weaknesses as well as on the opportunities and threats in the environment.			
5	My organisation has clear goals and objectives for what it wants to achieve in terms of inclusion – these are expressed as SMART objectives (see the Toolbox for an explanation of SMART)			
6	My organisation finds it easy to prioritise, making a distinction between what it must do, what it should do and what it would like to do.			

7	My organisation has clear indicators by which it measures the impact of its inclusion work.			
8	The way in which my organisation is structured internally makes sense in terms of efficiency and effectiveness.			
9	The inclusion work done by my organisation fits together coherently – the different areas of work fit well with one another.			
10	The external and internal contexts in which my organisation operates are relatively stable and there have been no major changes in the past year.			

Total score:

If your total is **20 or more**, then your organisation is ready for a strategic planning process. If your total is **between 15 and 20**, then your organisation would probably benefit from a strategic planning process. **Under 15**, then there is no urgency but remember you should carry out a new strategic planning process about three years after your last planning process.

Definitely

WHAT IS
STRATEGY?

Inclusion strategy

Implementation phase

Evaluation phase

Planning phase

Analysis phase

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

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

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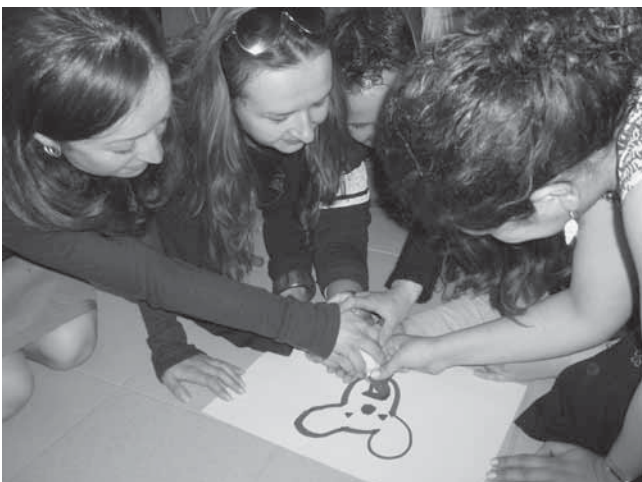
From Inclusion by Design

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

DEFINING 'STRATEGY'

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

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

(The Concise Oxford Dictionary, 1979)
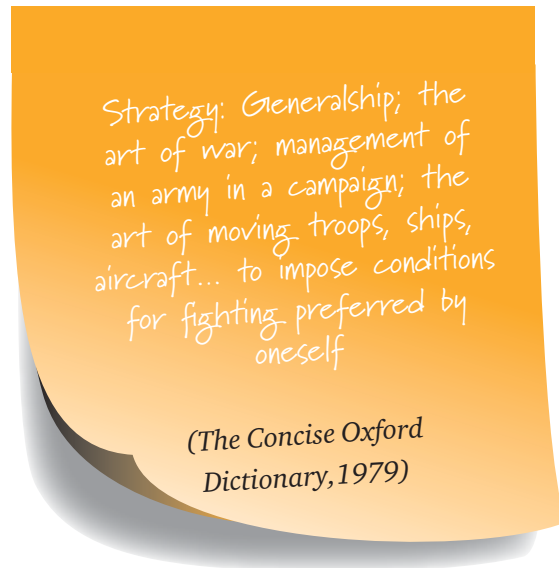
From Flickr.com

At first glance, this definition may not seem like it relates to the non-formal youth sector. In fact, the idea of "armies" and "conditions for fighting" seems to contradict the goals of inclusion work with young people. But look again…

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

Obviously, these points are all highly relevant to non-formal youth work. We know that we need management, leadership and a course to steer by. We know how easy it is to lose control and to let situations control us rather than the other way around.

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

A WORKING DEFINITION OF STRATEGY

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

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

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

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

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

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

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

From Flickr.com

IS MAKING A STRATEGY THE SAME AS PROJECT PLANNING?

The three key questions listed above can be applied in almost any situation, whether you are planning a wedding or developing an international aid programme for the United Nations.

However, there is a subtle **difference between making a strategy and planning a project** (even a large-scale one):

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

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

THE FOUR PHASES OF STRATEGY

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

1 The Analysis Phase

2 The Planning Phase

3 The Implementation Phase

4 The Evaluation Phase

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

☛ Each of these phases plays a vital role in a successful strategy. We will look at each one in more detail in the section **"Making an inclusion strategy"**

IS STRATEGY DEVELOPMENT A LINEAR PROCESS?

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

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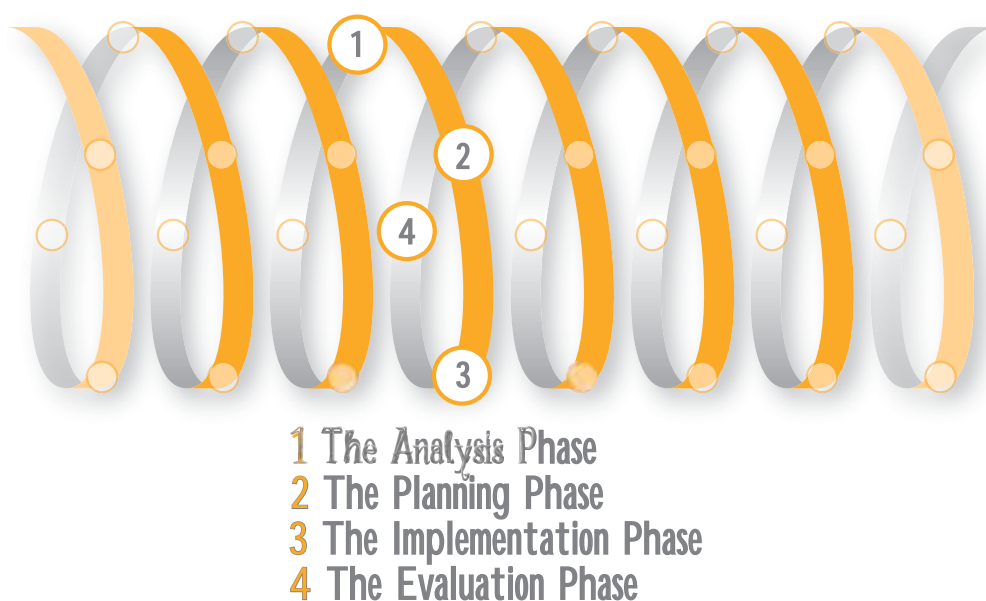
In practice, there can be a lot of **overlap** between the different phases. For instance, you may have to start **Implementing** before you have totally completed your **Planning**. By the same token, you may be deep in the **Implementation phase** when circumstances change, forcing you to go back to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

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

The most effective strategies are those which can respond and adapt to changes as they arise. This means that a strategy should not be just another document gathering dust on the shelf. A strategy is something alive, something which moves and evolves as necessary.

Having said that, it is important to stress that strategy development must begin at the beginning. It is not logical (and certainly not effective) to start implementing action steps before you even know where you are starting from.

ADVANTAGES AND DISADVANTAGES TO STRATEGY

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

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

From flickr.com

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

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

The disadvantages listed here are not actually disadvantages to strategy *itself*, but rather they describe problems which can arise when a strategy is not developed in the correct way.

These perceived disadvantages are actually commonly held *strategy myths*. These myths are so powerful that they can strangle the strategy development process before it even gets started. Therefore it is important to understand where these and other strategy myths come from.

STRATEGY MYTHS

There are **three main reasons** why people are **resistant** to the idea of making a strategy.
- We are afraid that strategy development takes a lot of **time**.
- We are afraid that a strategy will **limit** what we are allowed to do.
- We are afraid that you need special **expertise** to make a strategy
  (and also to understand it!)

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

## WHY DO WE THINK THAT STRATEGY TAKES SO MUCH TIME?

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

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

Another reason why we think strategy-making takes a lot of time is that we tend to see it as being something over and above our daily tasks. If your reaction to the idea of developing a strategy is "Oh great, another 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 your organisation. Spending three entire 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.

WHY DO WE THINK THAT A STRATEGY WILL LIMIT US?

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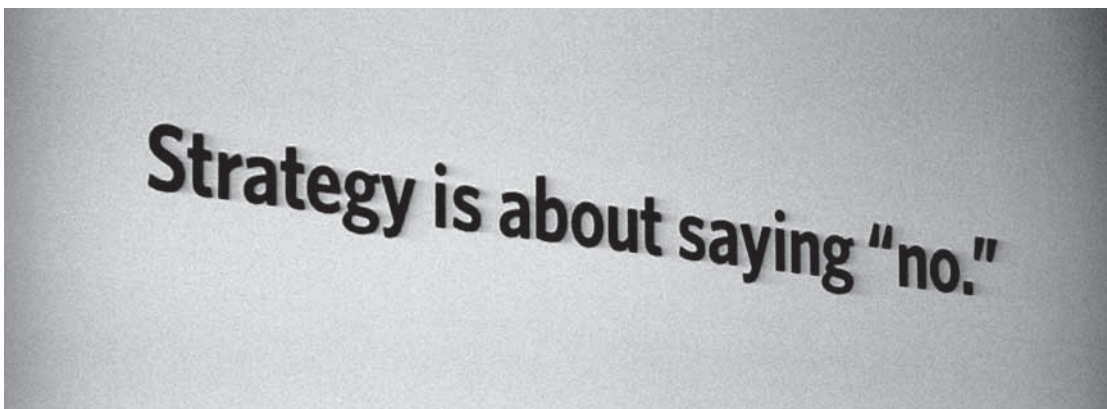
From Flickr.com

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

Now if your salary was increased, wouldn't you automatically take another look at your budget? Of course you would – you would want to see where you can make changes and how much money you can now use for "playing". On the other hand, if your salary decreases, you have to look at your budget to see where you need to make cuts. A budget is not permanent and neither is a strategy. Both a budget and a strategy provide an outline but they are never fixed in stone.

A good strategy is made up of **a plan solid enough to stand up over the long term** (despite changes in our environment) but which is also **flexible enough to adapt** to new situations when necessary. In this sense, a strategy is not a restriction but is rather a guideline. It is the compass that helps keep you going in the right direction. Most importantly, and just like a budget, a strategy helps you know when to say "no".

WHY DO WE THINK STRATEGY IS ONLY FOR EXPERTS?

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

There are a lot of experts who devote their lives to examining every miniscule detail of strategy development and spend years writing books about it. Frankly, a lot of this information is too detailed and too specific for our purposes, especially if you are making a strategy for the very first time. You don't have to have a Ph.D. in business-studies to give strategy-making a try. **Strategy-making consists of gathering information, understanding that information and using the information to make choices**. If you can do that, you are already well on your way.
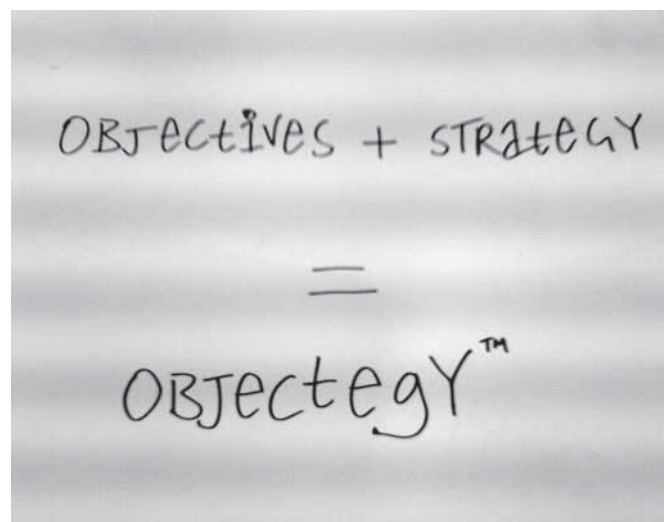
From Flickr.com

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

Strategy is **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

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

WHAT DIRECTIONS CAN INCLUSION STRATEGIES TAKE?

If you are new to either the world of strategy-making or to the world of inclusion, you may think that an inclusion strategy is little more than a schedule of activities. While many youth organisations do focus their inclusion strategies on the concrete actions they plan to carry out with their young people, this is certainly not the only direction an inclusion strategy can take.

There are almost as many youth organisations in the world as there are stars in the sky. Each of these organisations has their own way of working and their own vision of what they want to achieve with their young people. Therefore inclusion strategies can take many forms and go in many different directions.

Contribute to *inclusion*

Contact new profiles

Be more *inclusive*

Improve accessibility

Possible directions for inclusion strategies

Advocate or lobby

Improve information

Diversify staff and/or volunteer base

Increase visibility

Promote active participation

There are two obvious directions a youth organisation may choose to focus on, both of which use activities as a starting point:

- Strategies designed to **make an organisation's activities more inclusive** (i.e. more easily accessible) to a wider range of profiles and personalities of young people. For instance, an inner-city youth club may decide they need to find ways to make their arts and crafts programmes attractive not only to youngsters from middle-class families but also to those from lower-income backgrounds.
- Strategies designed to **make an organisation's activities contribute directly to the inclusion of young people** in society at large. This means that the activities emphasize the development of a young person's practical and social skills. For instance, the same inner-city youth club may decide to launch a series of workshops to help young people learn how to write a curriculum vitae. This activity contributes directly to the inclusion of the young people because it helps them to find jobs.

There is a considerable amount of overlap between these two possible directions. There is a good chance that organisations will be busy with questions regarding the inclusiveness and the inclusion impact of their activities at the same time.

Beyond these two, there are many other directions an inclusion strategy could take. The needs of young people with fewer opportunities go far beyond daily activities. Depending on the profile of the organisation, it may be interesting to develop inclusion strategies which go in alternative directions, such as:

- Strategies designed to reach new profiles in order to have a more representative mix of young people in the organisation
- Strategies designed to advocate or lobby for the target group on political level with the aim of increasing representation of certain groups on political level or for requesting that more funds be allocated to the target group
- Strategies designed to strive for more diversity within the staff, the board or the volunteer base of an organisation in order that young people can see profiles like theirs represented on all levels. This could mean including more people from different ethnic, religious, economic or gender backgrounds in the organisation. Similarly, it could mean offering more training for "mainstream" persons to learn how to better cope with the diversity around them.

- Strategies designed to increase visibility of the target group, the issues they face, the work being done with them, and their achievements to "mainstream" society.
- Strategies designed to improve the accessibility of the organisation itself. This could be on physical level – e.g. facilities – or else on organisational level – e.g. structures, procedures, meetings, etc.
- Strategies designed to promote more active participation of the target group, for instance in the organisation's decision-making processes or else in the development and implementation of its activities
- Strategies designed to improve the accessibility of the organisation's information to make it more appealing and easier for young people from different backgrounds to use (for instance, documentation, registration forms, meeting minutes, publications, brochures, website, etc.)

Any one of the examples given above can make an important contribution to the inclusion of young people with fewer opportunities. The question of which direction is right for you will depend on your organisation's profile as well as on your vision for the young people you are working with.

There is always so much to do in the in-clusion field that organisations often feel that they should be doing everything at once. This is a sure-fire way to burn out your staff and to overwhelm your orga-nisation as a whole. The key to effective inclusion strategy-making is to zero in on those areas or directions which are the most urgent and the most relevant.

Remember that the individualized approach to strategy-development works best. Don't try to copy what other organisations are doing – concentrate on what matters most to you.

Now that you have a better understanding of the concept of "strategy", it's time to see what steps should be taken to turn theory into practice. The next section outlines how youth organisations can get started on making their own inclusion strategies.

From No offence
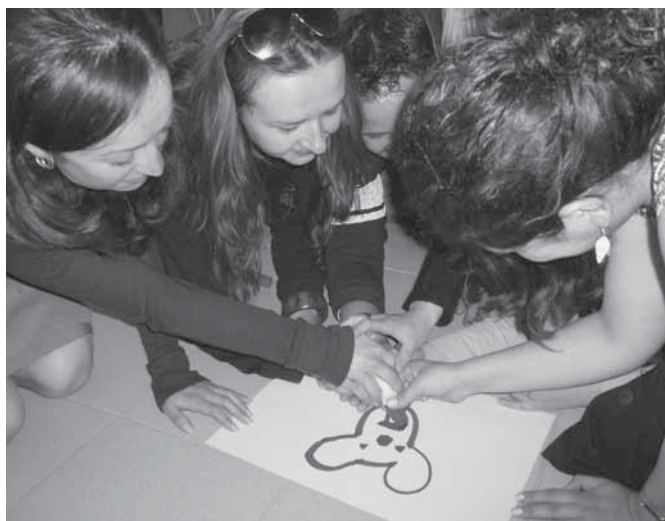
Inclusion in the Youth in Action Programme

One of the priorities in the European Commission's new Youth in Action programme (2007-2013) is the inclusion of young people with fewer opportunities. An **Inclusion Strategy** has been designed as the common framework to support the efforts and Actions which the Commission, Member States, National and Executive Agencies and other organisations undertake to make inclusion a priority in their work.

This "Inclusion Strategy" is based on two converging aims:

1. to ensure the **accessibility of the Youth in Action programme** for young people with fewer opportunities (both those organised in youth organisations, youth councils, etc, as well as those not formally organised);
2. to stimulate the use of the Youth in Action programme as a tool to enhance the **social inclusion, active citizenship and employability** of young people with fewer opportunities and to contribute to social cohesion at large.

Specifically, the Inclusion Strategy aims to:
- Ensure a common vision and commitment among the different actors of the programme in defining the target group and implementing the strategy;
- Make it easier for youth workers working with young people with fewer opportunities to develop and implement inclusion projects with the Youth in Action programme;
- Support the quality and quantity of the projects involving young people with fewer opportunities and to maximise their impact;
- Promote the use of the Youth in Action programme as an opportunity for self-development and learning for young people with fewer opportunities and as a possible stepping stone in their personal pathway;
- To stimulate diversity and to counter mechanisms of exclusion and discrimination.

MAKING
AN INCLUSION
STRATEGY!
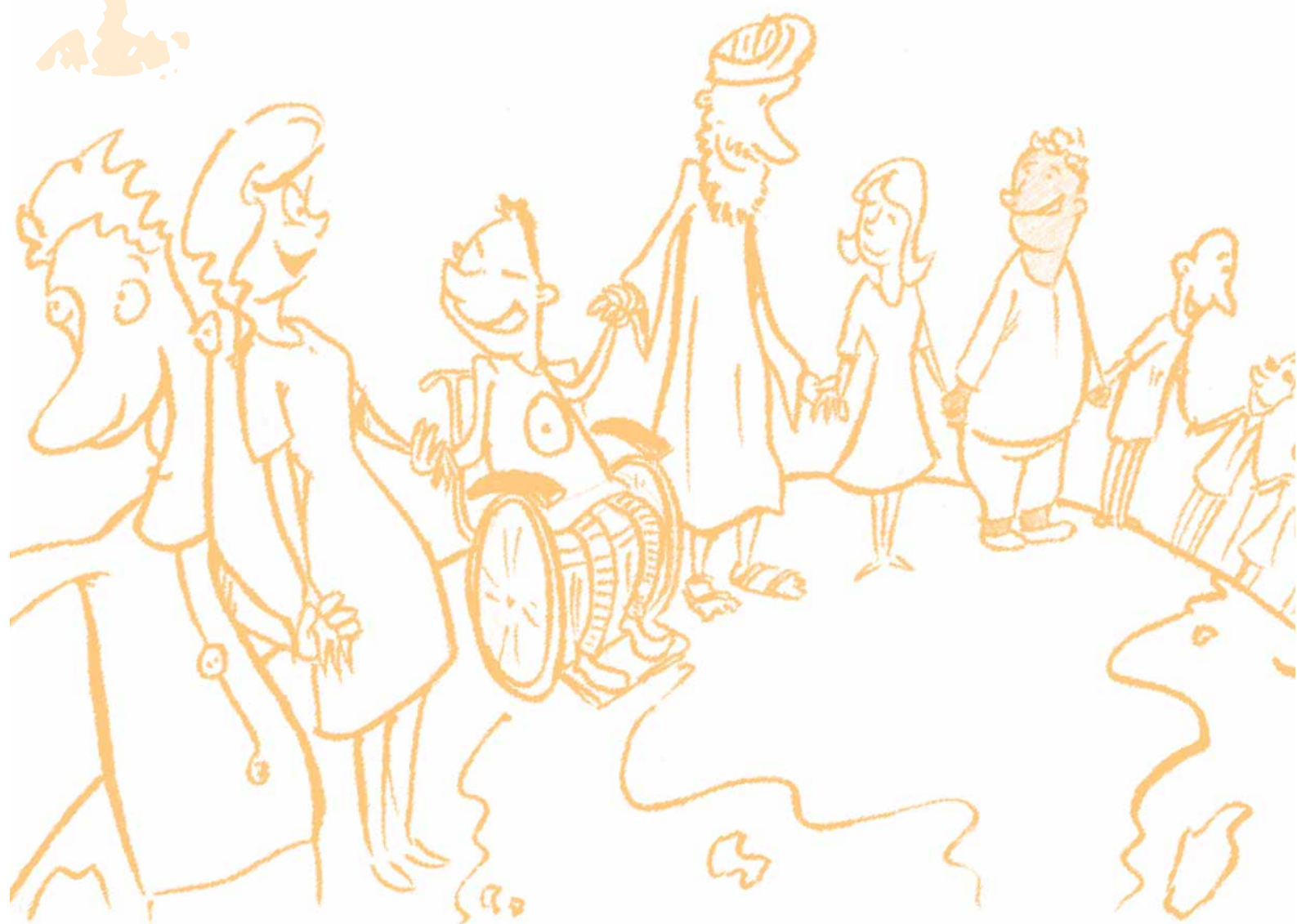
If you have made it this far, you are likely convinced of the need for an inclusion strategy. You are interested to get busy and start working out a strategy for your own organisation. This section outlines how you can start taking steps to develop and implement an inclusion strategy which suits your specific situation.

☞ While most people might be quick to agree that having a strategy is generally a good idea, many people feel they don't know <u>how</u> to make a strategy. They don't know where to begin or which steps to take. To help you get started, we have listed several exercises at the end of the booklet in the **"Toolbox"**. These are certainly not the only methods you could use but we hope they will help you to find your own way through the strategy-making process and keep up your motivation along the way

WHO SHOULD BE INVOLVED IN THE PROCESS?

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

Generally speaking, the idea of "strategy making" is not usually greeted with enthusiasm in the youth sector, so it is not uncommon for the task of making an inclusion strategy to be "given" (read "passed to" or "dumped on") one or two members of the organisation. This is a recipe for disaster.

If an inclusion strategy is to be in any way effective, it needs to be treated seriously and given the time and space it deserves at the highest levels of the organisation. It is not realistic for one or two persons to try to make a strategy on their own. Not only is there simply **too much work** involved but if the inclusion strategy is developed in isolation there is a good chance that the end result will clash with the visions and plans of the rest of the organisation. There is also a strong possibility that the rest of the team will resist implementing the plan because they were not involved in the overall development.

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

STAKEHOLDERS

A *stakeholder* is anyone who has an interest in or who might be impacted by your strategy. There are two main groups of stakeholders:

- **Internal stakeholders** – people **inside** your organisation whose tasks will be impacted by your strategy. Internal stakeholders in youth organisations include the director, managers and board members but also the youth workers active in the field and, of course, the young people themselves.

- **External stakeholders** – people (individuals, groups or entire organisations) **outside** your organisation who will **be affected** by your strategy and who can (or want) to **influence** the future of your organisation. External stakeholders for youth organisations could include like-minded partner organisations, schools and teachers, social workers, employment offices, local law enforcement, government offices, and so on.

These are just some examples. Remember that not everyone should automatically be considered as a stakeholder – only those who will be **most affected** by your plans and those who will make the **biggest contribution** to the strategy-making process.

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

THE STRATEGY TEAM

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

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

No matter what the size or composition of the strategy team, it is a good idea to involve **the head of the organisation** whenever possible. (Depending on how your organisation is structured, the head could be the director, the chairperson of the board, or the office manager) It is their task to ensure that the inclusion strategy links in with the rest of the organisation's activities. Any strategy developed by the team must have the approval of the head of the organisation if it is to be put into practice. This does not mean this person needs to attend every strategy team meeting but they do need to be kept informed of developments as the strategy takes shape.
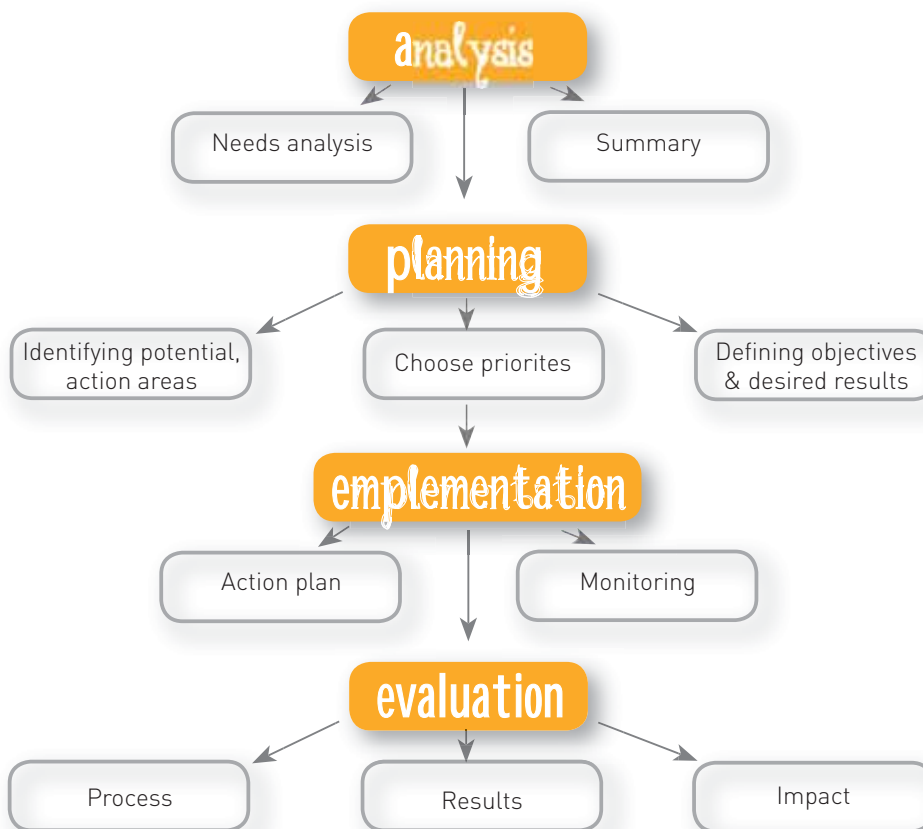

From TC Image Building

The composition of the rest of the strategy team will depend on the size of the organisation, its current level of involvement in inclusion work, its ambitions for the future and of course its financial means. When choosing potential team members, **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"). Remember that it is vital to find a way to allow young people to actively participate in the process – even if it is not immediately obvious how to do so.

Large or small, the strategy team must remember that the direction of an inclusion strategy will affect the entire organisation so it is important **to provide regular updates** on the plans being made.

WHAT DOES THE PROCESS LOOK LIKE?

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

```
                        analysis
          Needs analysis          Summary

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

                     emplementation
          Action plan             Monitoring

                       evaluation
       Process          Results            Impact
```

Each person involved in inclusion in the organisation will be impacted by the different phases but the main responsibility for steering and guiding this process rests with the strategy team.

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

The next sections outline what is involved in each phase.

�֎ The Analysis Phase

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

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

(Alice in Wonderland, Lewis Carroll)

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

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

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

WHERE ARE WE NOW?

To know where you are you must answer a series of sub-questions. What has happened in our inclusion work up to now? What has gone well, what has not, and why? What do the young people say about us and how do they see us? What are the most important challenges we are facing in the organisation right this moment?

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

WHAT IS A NEEDS ANALYSIS?

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

A needs analysis can help you determine your current position (O'Connell). This, in turn, makes it easier to decide where you need to go. In essence, **a needs analysis is:**

- A **review** of your past successes and challenges in terms of inclusion
- An **inventory** of what has been developed and what areas still need to be explored
- A **health check** of your internal procedures
- A **framework** for understanding the "bigger picture" of inclusion in your country.

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

A **needs analysis involves**:

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

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

As you go through this process you are actually analysing what is happening in the inclusion field inside and outside your organisation. 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** you have in terms of inclusion and also to **indicate opportunities** for the future. This information can then help you to make the difficult choices which will come up in the Planning phase.

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

Be aware 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.

HOW DO I DO A NEEDS ANALYSIS?

Carrying out a needs analysis is a lot like trying to put together a jigsaw puzzle. Each piece of the puzzle is unique and shows a different angle of your organisation and the environment around you, yet each piece is essential to providing the complete picture.

To understand your current situation in terms of inclusion, focus on the following puzzle pieces:

- *Your mission* – On a global level, what is it that you are working towards? What, specifically, does your organisation want to work towards in inclusion and what do you concretely hope to achieve?

- *Your past performance* - In terms of inclusion, what has your organisation concretely achieved to date? To what extent have you successfully been *inclusive*? To what extent have you successfully contributed to *inclusion*? Can you spot any significant trends? What types of challenges or difficulties have you faced in the past? Does the organisation have earlier versions of inclusion strategies? Were those objectives achieved? Why or why not?

- *Your internal systems and processes* – Are your systems as effective (and as *inclusive*) as they could be? This area is crucial because much of the work with young people with fewer opportunities is dependent on efficient systems. Youth organisations should consider processes related to information and promotion, processes related to participation, processes related to finances, processes related to staff and/or volunteer recruitment, processes related to evaluation and follow-up, etc.

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

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

- *Socio-economic trends and changes* – social, economical and political changes usually affect the most vulnerable groups in society first. Any major shifts or trends in this area will likely have a big impact on an organisation's inclusion work. What is going on locally, regionally and/or nationally? How this might impact the young people you work with?
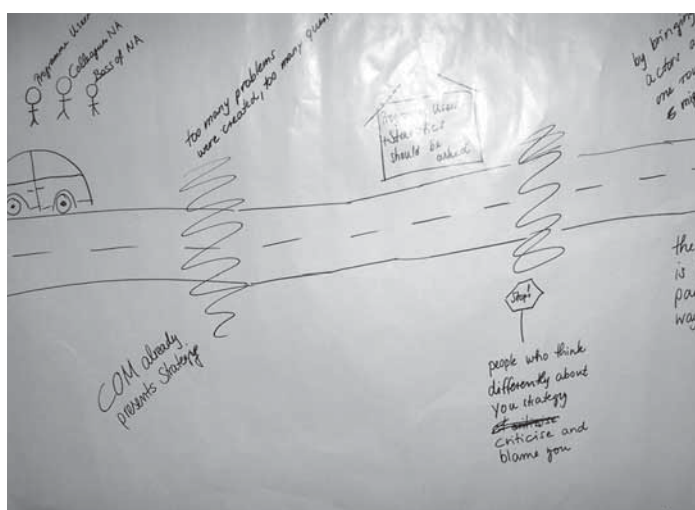
From Round Table Meeting on Inclusion Strategies 2007

Reviewing your "mission" for inclusion will remind you of the direction you are meant to be going. **Reviewing** your past performance and your internal systems will highlight your strengths and weaknesses. **Reviewing** the needs of your key stakeholders, the activities of our competitors and current socio-economic trends will indicate where you can find new opportunities as well as potential threats to 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 organisation right this moment. This tells you exactly where you are in terms of inclusion and what your starting point is ("here today"). Not all the information you collect will be positive but remember that to really know your situation, you have to be objective. You are looking for the cold hard truth.

METHODS / TECHNIQUES TO USE IN A NEEDS ANALYSIS

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

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

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

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

SUMMARISING THE OUTCOMES

As the needs analysis progresses, you will likely collect a large amount of information. As the process draws to a close, you are going to have to make sense out of all the different outcomes by pulling out the elements which are the most valuable or which will have the most impact on future inclusion activities.

Remember that a needs analysis is a series of puzzle pieces – each one showing a different perspective on your organisation. At the end of the Analysis phase, you need to bring the different pieces together in order to determine what the final picture looks like. To do this, you need to summarise the main findings of all your research.

A useful tool for this process is a **SWOT summary**. SWOT stands for **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats. Strengths and weaknesses refer to internal factors that you can control *inside* your organisation. Opportunities and threats refer to forces beyond your control *outside* your organisation.

SWOT Summary	
Strengths • • •	Weaknesses • • •
Opportunities • • •	Threats • • •

A SWOT summary is ideal in the **final phase** of a needs analysis because it presents a concise overview of the most important positive and negative points to come out of your research. (A description of how to do a SWOT summary can be found in the **Toolbox**.)

Whether you use SWOT or another method, keep the following points in mind as you make your summary:

- Make sure that **everyone in the strategy team agrees on the main points in the summary**. You need to have consensus in the team whether you are speaking of positive or negative points. If there is serious disagreement over the results, there is a good chance that some information is either incomplete or is unclear. Go back to find out where the problems are. If there is already dissent in the team in this early phase, it will be extremely difficult to make the tough choices that lay ahead in the Planning phase

- Once the team is in agreement, **present the results to the head of your organisation or to your board for their approval**. Be sure that they also agree with your conclusions. Get their "OK" before you move into the Planning phase.

- As a final step, **share the outcomes of your SWOT with your key stakeholders** (internal and external). This is a good way of double-checking your conclusions. Your stakeholders can point out any areas which may have been misinterpreted or which are already being addressed.

You will likely have invested a good deal of time and effort into your needs analysis, so it makes sense to finish off the process by producing a solid summary of the outcomes.

DO'S AND DON'TS IN THE ANALYSIS PHASE

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

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

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

From TC Image Building

It will have taken you some time, but when the ink has dried on your SWOT summary and you have the approval of both the head of the organisation and the key stakeholders, your organisation can say with certainty

WHERE ARE WE NOW? WE ARE HERE.

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

❋ The Planning Phase

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

A goal without a plan is just a wish.

(Antoine de Saint-Exupery)

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

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

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

Your plan is your answer to the key question:

WHERE DO WE WANT TO GO?

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

WHAT IS INVOLVED IN THE PLANNING PHASE?

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. **This is where you must decide what you will and will not do**. You must also sort out which information is relevant for your organisation and which is not.

The process is not always easy. Making a plan is quite 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 organisation has invested the time and effort required for a thorough needs analysis, you are already well on your way.

HOW LONG DOES THE PLANNING PHASE TAKE?

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

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

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

TALKING IT OUT

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

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

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

HOW DO I MAKE A PLAN?

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

The more complex the situation the more difficult it is to make **coherent plans**. In a field as broad and complex as inclusion it is no wonder that youth organisations often find it difficult to know where to start.

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

Identifying potential,
action areas

Choose priorites

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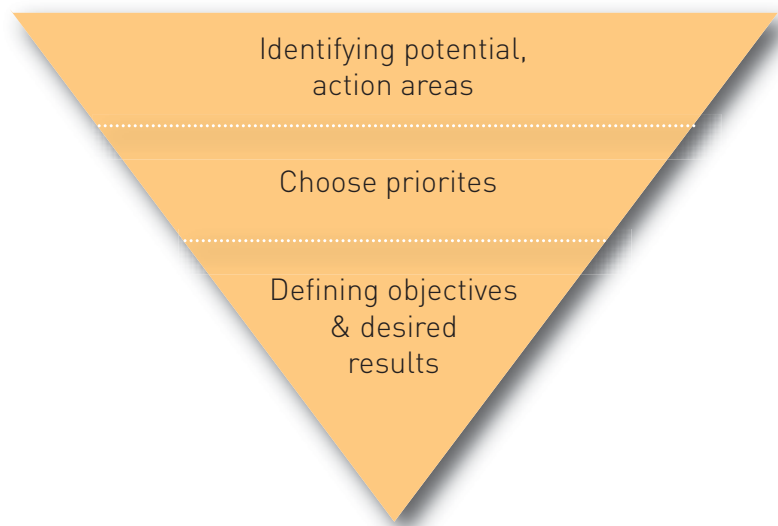
The best way to visualize the planning phase is to think of an **inverted triangle** (see the diagram above). The inclusion field is very large and there are many needs which all require urgent attention. It is simply not possible for to respond to all of these needs at once. The planning phase involves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

GETTING STARTED
In order to put together a strategic plan, you will need the following important tools:
- **the vision and mission statements** of your organisation. These outline your global goals and should (hopefully) also provide a global indication of your intentions in terms of inclusion.
- **the result of your organisation's needs analysis** from the previous phase.

These tools present you with **two sides of the same coin**: first, your organisation's *projected vision* for the future and second, your organisation's *current situation*. Both of these need to be taken into account at each of the steps in the planning process. The extent to which these two sides do (or do not) match will impact the planning process.

☞ If your organisation does not yet have a vision or mission statement, try using the method provided in the **Toolbox** (section of this booklet to develop) this important tool for your organisation.

When you sit down for your first planning meeting with the strategy team a good way to get started is to take just a few moments to review these tools. Taking just a little bit of time to get (re)acquainted with the two sides of the coin can help to get oriented and to focus your thoughts.

Once the strategy team has oriented itself and is familiar with both of these tools, you are ready to start the process of moving from a wide range of potential action down to a short list of specific and carefully defined objectives.

STEP 1 – IDENTIFY POTENTIAL ACTION AREAS

It is likely that during the information-gathering in your needs analysis you spotted many areas where it could be interesting (or where it is urgent) for your organisation to invest its inclusion time. Unfortunately, you cannot respond to all inclusion needs nor do you have enough resources to develop every interesting new idea. **Being strategic is about making choices** (Olsen) but in order to choose we must first have a clear idea of what our options are. We need to identify our potential action areas.

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

From TC Image Building

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

☞ This method is sometimes called a "SWOT Interplay" - see the **Toolbox** (section of this booklet) for a detailed description of this method

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

Remembering the global goals of your vision and mission statements on one hand and taking account of the points raised in your needs analysis on the other, consider the following **questions**:

- What can we do that will help our organisation achieve our purpose in inclusion?
- What activities will do this?
- Do these actions/activities make sense in terms of our global mission?
- Are there other things we should be doing?

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

In this step you are looking for any and all feasible areas for action. Don't limit yourself in the brainstorming phase – put down all your thoughts about what could or should be done in terms of inclusion. (If your organisation works on different levels, brainstorm for each level separately – for instance, what can we do on local level, what can we do on regional, national, European levels…?)

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

STEP 2 – CHOOSE PRIORITIES

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

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

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

Ann Hendriks,
SALTO Resource Centre on
Inclusion (Belgium,Flanders)

There is no one fail-safe method for choosing your priorities. **Inclusion is a particularly difficult area to prioritise because the spectrum of target groups is so diverse and the number of potential actions is huge**. Nevertheless, if you look at your list of potential actions you can probably immediately identify some which need urgent attention and others which absolutely don't. The process becomes tricky when you can't easily recognise whether one area of action is more important than another.

One way to determine priorities is to match up different potential actions and compare them against each other to choose which one has a higher importance.

☞ This technique is called a "Paired Comparison Analysis"- see the **Toolbox** (section of this booklet) for a more detailed description of this method

If you prefer a more informal method, you can try **short-listing**:

A. In your strategy team, review your list of potential action areas. Pull out all potential action areas which are obviously urgent or need attention and short-list them. Eliminate any potential action areas which are clearly not a priority at this time. You are now left with a group of "in-betweens" or potential actions which you are less sure what to do with.

B. Go through your list of "in-betweens" one at a time and for each one ask yourself the following **questions**:
- Do we feel our organisation can **make a significant difference** in this area?
- Do we feel our organisation is **qualified** to address this area?
- Is anyone else (e.g. other organisations) already working on this area? If so, does our organisation have **anything to add**?
- Will getting involved in this area **make good use of our organisation's resources**?

If the answer to any of these questions is "yes", then it is likely that you need to include that potential action area on your short list.

Once you have gone Part A and Part B, you will have identified the potential action areas that need attention and eliminated those that don't but **you still need to prioritise your short list**.

C. Ask yourself:
- What is **most important** for our current and future work?
- What is **too serious** to ignore?

Those potential action areas which are most important and too serious to ignore are your **priorities**. Take these to Step 3 and use them to define your specific objectives. All the other action areas are secondary priorities. Put them to one side for now.

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

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

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

STEP 3 – DEFINING OBJECTIVES AND DESIRED RESULTS

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

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

An *objective* is the object or aim of an action (Allen). **An objective states what is to be done and indicates the results to be achieved**.

From TC Image Building

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

Defining objectives and desired results is mainly a question of finding the right formulation. To get started, choose one of the priorities from your list. Ask yourself
- What exactly do you want to achieve in this area?
- How much / how many do you want to achieve?
- For whom (which target group)?
- Within which timeframe?

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

EXAMPLE 1

A youth organisation working in "Small-Town" has noticed that, compared to other profiles, the number of young women from ethnic backgrounds taking part in their activities is very low. The organisation decides that increasing the number of female participants from ethnic backgrounds is one of their priority action areas.

Priority action area	Desired result (after 3 years)	Objective
Increase the number of young women from ethnic backgrounds participating in our activities	Have a minimum level of 25% participation of young women from ethnic backgrounds in each separate activity programme.	To increase the participation of young women from ethnic backgrounds to a minimum of 25% in each separate activity programme.

EXAMPLE 2

Over the past 5 years, a youth organisation based in "Big-City" has been successful in including fewer-opportunity young people from a variety of backgrounds in their sport and physical recreation programmes. However, they are unable to say to what extent that participation has contributed to the inclusion of the young people in society at large. The organisation decides that developing a new system of evaluation to measure inclusion in Action 1 is one of their priority action areas.

Priority action area	Desired result (after 3 years)	Objective
Develop a quality-based evaluation system to measure social inclusion resulting from young people's participation in our sport and physical recreation activities	Have newly-defined quality indicators and evaluation systems in place and in use by all sport and recreation activity leaders	To develop and implement a new evaluation system to be used by all activity leaders which is based on quality indicators for measuring the level of social inclusion reached as a result of young people's participation in our sport and recreation activities

Once you have written out clear objectives for each of the priorities on your list, double-check to make sure that they meet the SMART criteria. Are your objectives:

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

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

☛ More information on SMART objectives can be found in the Toolbox section of the booklet.

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

THE IMPORTANCE OF THE TIMEFRAME

When defining your objectives and desired results, pay close attention to the **timeframe** in which these are to be achieved. There is no hard and fast rule for defining a timeframe; this will depend entirely on your specific situation. Some organisations are in a position to define objectives for up to 5 years but others may find it difficult to look ahead over such a long period. If your organisation is developing an inclusion strategy for the first time, it is advisable to develop a plan which fits into a slightly shorter period, **for instance 3 years**. This is long enough to allow you to achieve complicated objectives and at the same time is short enough **to keep up the team's energy and enthusiasm**.

Choosing a **realistic timeframe** is **vital to the success of your strategic plan**. Your objectives need to be structured in such a way so as to offer your organisation some **long-term perspective** in its inclusion work. They should be leading towards concrete changes and improvements. Because of this, a 3-year period should be seen as the **minimum** length of time needed in which to measure objectives. Anything less (e.g. 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 than a strategic outlook.

SUMMARISING YOUR PLAN

The three steps of the Planning phase provide you with a solid strategic plan. They will also clearly illustrate the logic that led you to the final result. If you line up the outcomes of the different steps on paper, you can see a clear line running through the entire process to this point:

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

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

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

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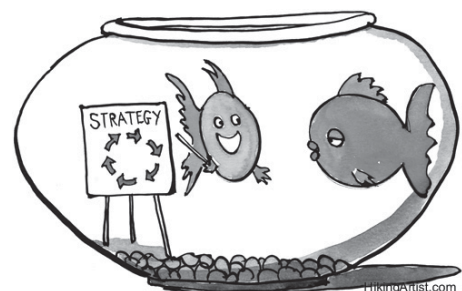
From Flickr.com

DO'S AND DON'TS IN THE PLANNING PHASE

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

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

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

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

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

❈The Implementation Phase

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

A little less conversation, a little more action.

(Elvis Presley)

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

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

HOW WILL WE GET THERE?

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

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

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

MAKING AN ACTION PLAN

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

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

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

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

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

From TC Image Building

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

The most thorough approach is to develop an action plan for each of the objectives defined in your strategic plan. If we use the objective defined by the youth organisation in "Small-Town" as an example (presented in step 3 of the Planning phase above), their action plan for the first year might look something like this:

EXAMPLE

A youth organisation working in "Small-Town" has set itself the 3-year objective of increasing the participation of young women from ethnic backgrounds to a minimum level of 25% in each of their separate activity programmes. At this time the organisation has very little information about the situation of these young women. At the same time, the organisation is not sure that the activities they offer are of interest to this target group.

The organisation decides that in Year 1 their efforts need to focus on getting better acquainted with the needs and interests of this target group and then comparing these with the learning elements in their current activity programme.

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

Action Plan

Objective: To increase the participation of young women from ethnic backgrounds to a minimum of 25 % each separate activity programme.

Step #	Task	Person responsible	Start date	End date	Progress	Cost
1	Making initial contact with community partners - Schools - Churches/mosques/synagogues - Other youth orgs in the area	Jamilah	1 Sept.	31 Dec.	100%	40 hours
2	Organising a series of informal focus group meetings - with the young women on their own - with young women ands family members together	Aisha	15 Jan	15 March	90%	40 hours + 1000 € meeting facilities
3	Examining current programme and comparing with feedback	Goran	April	15 April	15%	20 hours
4	Examining feasibility of new proposals for activities (if necessary)	Jens	1 April	30 May	10%	30 hours
5	Promoting the coming year's activities to the target group and community at large	Jamilah & Aisha	30 May	30 Sept	Not started	60 hours + 1500 € advertising material

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

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

Notice that in this example the costs are expressed largely in terms of time. Not every task will directly cost your organisation money but they will certainly cost staff or volunteer time. Including a time estimate in your action plan can be very useful. If your supporters spend their time on one area, they obviously have less time for other tasks.

The example above shows how much work is required for just *one* **objective** within a period of just *one* **year**. Remember that you have probably identified 2 or 3 or even more objectives. Each separate objective should have its own separate action plan. Although it sounds like a lot of work, separate action plans are needed in order to outline clearly what should be done and who should be doing it.

When the separate action plans are compared against one another, it is easy to see if different objectives are competing or overlapping with one another (for staff time or other resources). This is also a good way to judge if you can realistically achieve your objectives within the time defined (if not, take steps to change your course right away).
There are many **advantages** to using action plans:
- Each person knows their job
- Each person knows where their responsibilities end
- Each person knows what their colleagues are doing.
- Each person is working towards clear deadlines
- Each person can see what progress is (or is not) being made at a glance

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

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

MONITORING YOUR STRATEGY

Despite all the effort to define objectives and lay out action plans it is still very easy for a strategy to get off track. There are any number of circumstances, internal as well as external, that could impact your strategy. For **example**, staff turnover might mean that it is no longer possible to achieve certain tasks within the defined timeframe. Turnover among your volunteer activists could mean that some tasks have to be re-allocated. Economic and/ or political changes may seriously affect the young people in your organisation. Most of these changes cannot be predicted in advance.

Drastic changes in your situation do not necessarily mean the end of your strategic plan but they do demonstrate the importance of keeping on top of your strategy at all times. This requires **active management**. This process is often referred to as monitoring.
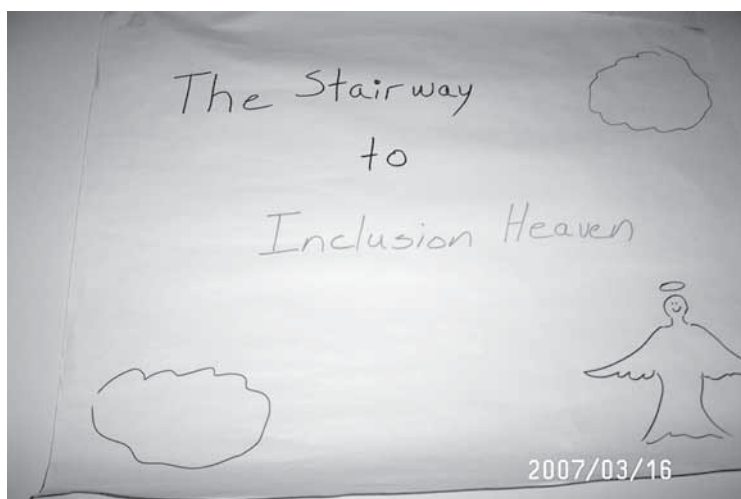
From Round Table Meeting on Inclusion Strategies - 2007

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

In its most basic form, monitoring takes place each time an individual staff member or volunteer checks their tasks listed on the action plan. However, if implementation is to be as effective as possible your organization needs to adopt a more structured approach. It is good practice to hold monthly meetings to review the status of the different tasks in the action plan. You can also use this time to look further to see if you are still on track to achieve your 3-year objectives or if changes need to be made.

Method – Traffic Light

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

For example, if you are half-way through a year where your objective is to make 10 of your buildings accessible for wheelchair users and to date you converted 5, the status of this target is **"green"**. If, by contrast, you have converted 3 then the status is **"yellow"** and the point needs to be discussed at the next meeting. If however you have only managed to convert 1 or 2 of the planned 10 buildings, then the status is **"red"**. This indicates that urgent action is required or that the desired result has become impossible to achieve.

(Bruce & Langdon)

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

Youth organisations need to be ready to respond creatively to new developments in inclusion without constantly having to remake the entire strategic plan. At the same time a strong guiding hand is required to make sure each member of the team remains committed and focused on their targets.

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, your organisation needs to be ready to adapt and adjust as necessary.
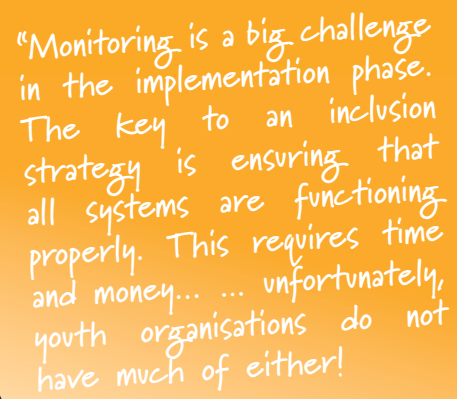
Plans are essential but they are not set in stone. If they are not working or if circumstances change then plans need to change too. **The field of inclusion is known for its high degree of unpredictability**.

Youth organisations cannot possibly foresee all eventualities that might impact their inclusion strategy. Monitoring is the tool which helps the organisation to 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 your strategy provides you with a basis on which to evaluate new opportunities. Although it can be frustrating to have to re-draw your action plan or, in dramatic cases, to have to go all the way back to re-define your priorities and 3-year objectives, try to see such moments as challenges rather than setbacks. **A change in circumstance offers the strategy team the chance to find better options or to improve the working methods defined earlier**.

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

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

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

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

DO'S AND DON'TS IN THE IMPLEMENTATION PHASE

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

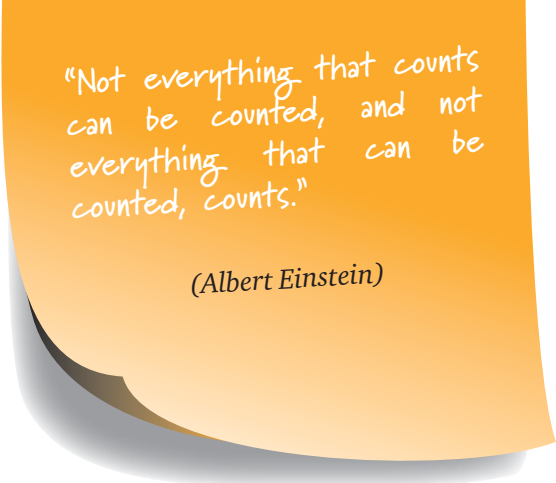| Don't	Do
Limit the responsibility for implementation	Encourage ownership of the strategic plan throughout the entire team by giving each person a role to play.
Forget the importance of communication	Present and explain the strategic plan and its specific objectives clearly to the rest of your staff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

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

HOW WILL WE GET THERE? LIKE THIS.

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

✖The Evaluation phase

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

> "Not everything that counts can be counted, and not everything that can be counted, counts."
>
> *(Albert Einstein)*

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

WHAT IS INVOLVED IN EVALUATION?

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

> However beautiful the strategy, you should occasionally look at the results
>
> *(Winston Churchill)*

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

For instance, if your objective is to increase the number of school drop-outs taking part in your activities by 50%, you need to know what their level of participation was at the very beginning.

If you invested the time required for a thorough needs analysis, your organisation should have established such a baseline thanks to the work done in the early stages.

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

EVALUATING AN INCLUSION STRATEGY

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

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

EVALUATING RESULTS

An evaluation of the **results** of your inclusion strategy will show you to what extent you have achieved your objectives. Depending on the priorities you 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).

From Round Table Meeting on Inclusion Strategies - 2007

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

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

EVALUATING IMPACT

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

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

EVALUATING THE PROCESS

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

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

Evaluation does not just happen on its own. Like so many other aspects in the strategy-making process, evaluation requires planning. There is a wide variety of methods and techniques available that organisations can use to help them with the preparation and design of their evaluation as well as for collecting and interpreting information. The methods you choose will depend on the scope and duration of your strategic plan as well as on the resources available to you.

☛ Some examples are included in the **Toolbox** at the end of this booklet

AFTER THE EVALUATION

All the work you put into evaluation will be of little value if you do 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 organisation to take:

- **Learn from the process** – by learning what worked and what did not, what you did right and what you did wrong, your organisation is empowered to act in an informed way in future. The purpose of learning is to make changes where necessary and to identify and build on strengths where they exist.

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

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

WHAT SHOULD HAPPEN WITH THE RESULTS?

After putting in time and effort to thoroughly evaluate their inclusion strategies, it makes sense for youth organisations to publicise the results as widely and as often as possible. One of the final tasks in your inclusion strategy is to share the outcomes, both good and bad, with the appropriate audiences. This process is sometimes referred to as the *dissemination of results*.

There are a variety of **methods** youth organisations 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 organisation

- **Publishing** – spread the results to a wider audience. Consider using a variety of tools including reports, brochures, websites, newsletter articles, local news broadcasts, etc.

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

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

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

DO'S AND DON'TS IN THE EVALUATION PHASE

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

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

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

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

ROUNDING OFF

CHECKLIST FOR AN INCLUSION STRATEGY

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

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

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

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

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

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

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

COMMON PITFALLS

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

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

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

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

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

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

EXTRA TIPS FOR SUCCESS

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

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

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

- **Involve young people!** The most important stakeholder in the inclusion strategy process is the young people themselves. It is not always easy to know how to involve young people from fewer-opportunity backgrounds in strategic development but their voices need to be heard. Try to find different ways and different moments to allow young people to take part in the process.

- **Link in with other organisations!** Other youth organisations in your area might be facing the same types of challenges in their inclusion work that you are. There is much to be learned and gained by co-operating with potential partner organisations whenever possible.

WHAT DO YOU DO WHEN YOU REACH YOUR STRATEGIC GOALS?

The very first thing you should do is to **celebrate**, of course! Strategy-making is a long-term undertaking so it is very important to recognise when you reach important milestones along the way. Did your organisation manage to achieve one of its major objectives? Treat the office staff to a nice lunch or throw a party for your volunteers. Taking time to reward the team for their hard work is a great way to keep up their motivation for the next round of tasks.
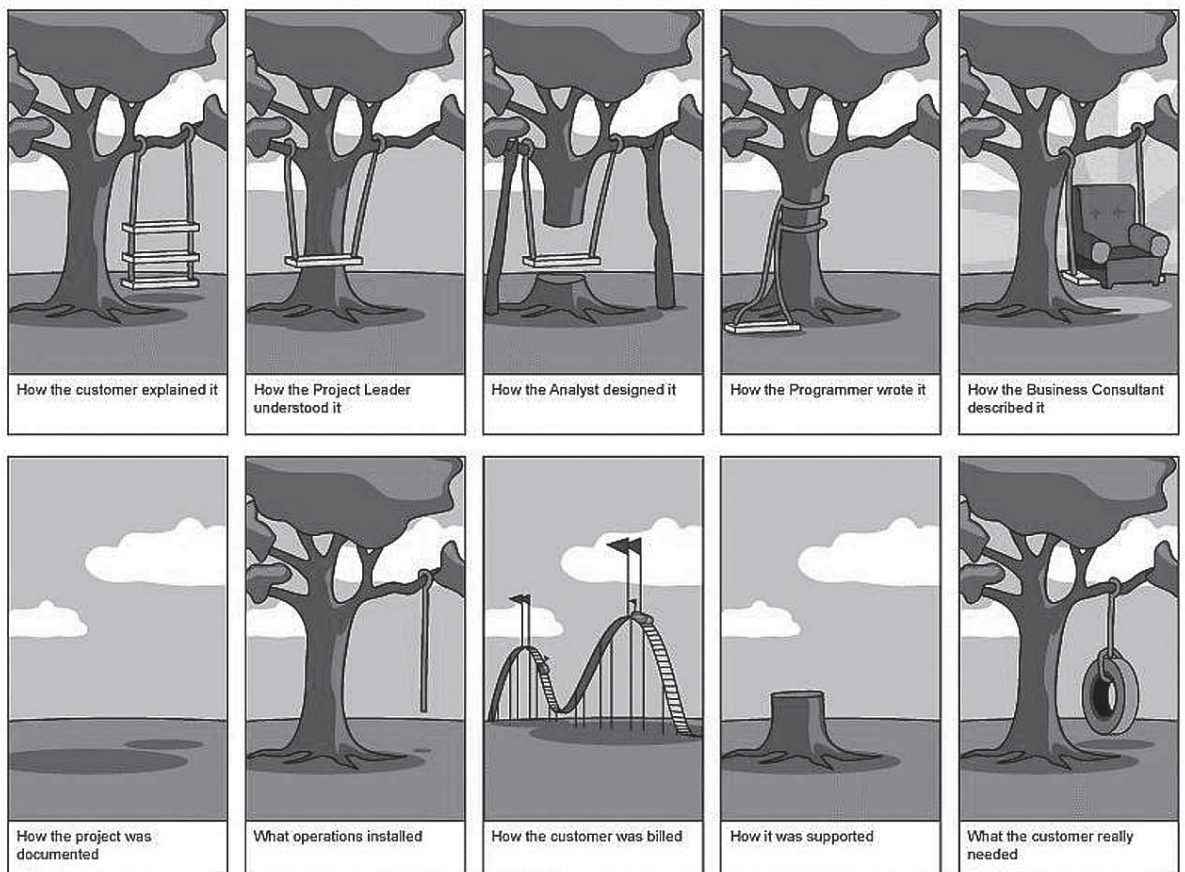
Beyond celebrating, the other important step is to stop and look again at your overall strategic plan. If you have achieved certain objectives, you now have room to work towards others. Remember that **list of leftover secondary potential action areas** you made back in the Planning phase? This is a good moment to look at them again to see if they should now be prioritised and integrated into your yearly action plan.

FINAL WORDS

The theory and methods presented in this booklet are not only relevant for the field of inclusion. They can be applied to just about any area where a strategic approach is needed. Feel free to adapt the ideas and tools presented here to suit your own specific situation.
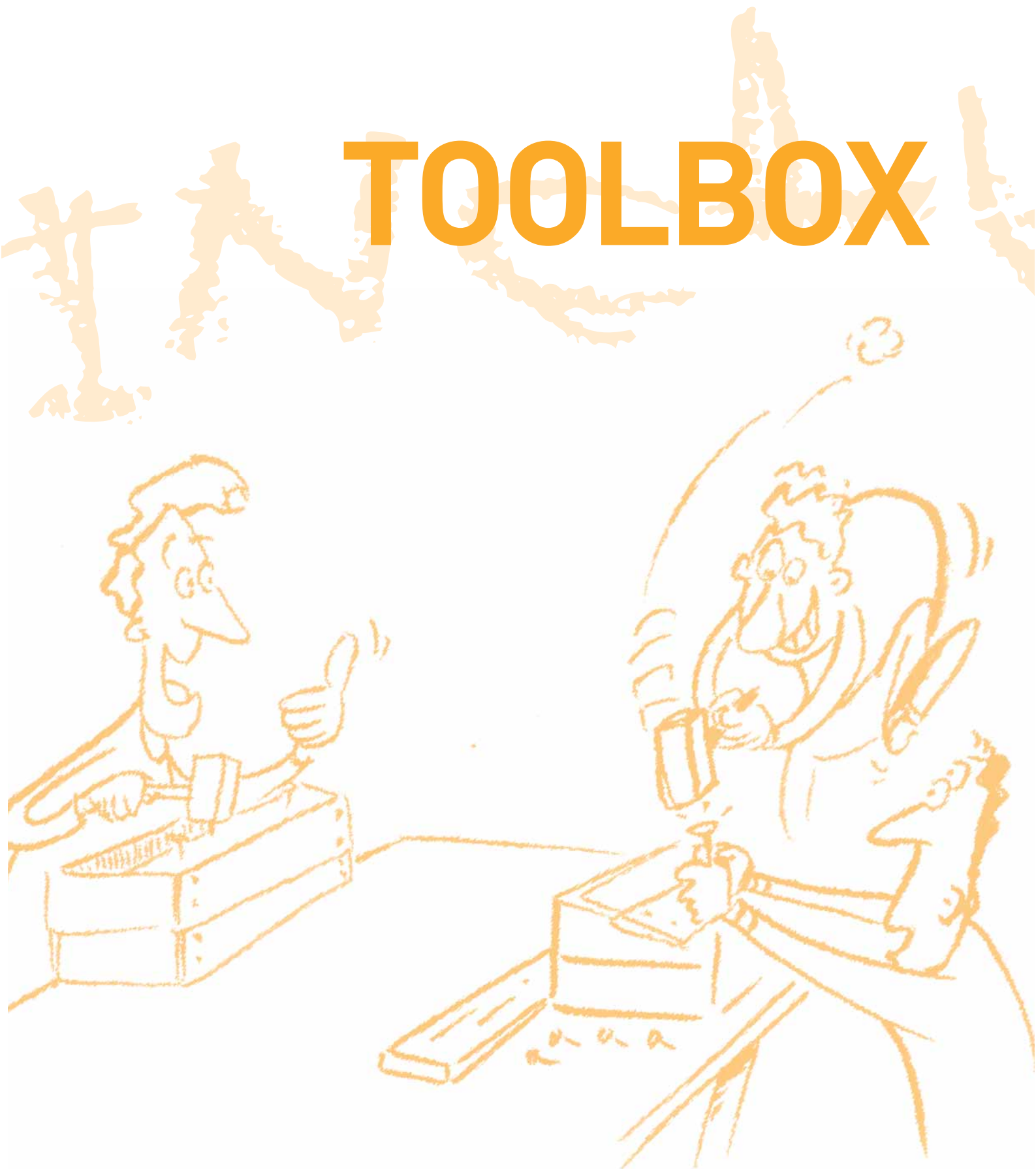
If you still find the idea of making your own inclusion strategy a bit overwhelming, take heart. Strategy isn't about trying to achieve perfection. Strategy is a way that you decide to work over the long term (Nelson & Economy).

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

How the customer explained it

How the Project Leader understood it

How the Analyst designed it

How the Programmer wrote it

How the Business Consultant described it

How the project was documented

What operations installed

How the customer was billed

How it was supported

What the customer really needed

From Flickr.com

TOOLBOX

On paper, the theory behind putting together an inclusion strategy is relatively simple but it is not always easy to know how to put theory into practice.

This section presents a variety of tips and 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 youth organisations and the specific needs of the inclusion field as much as possible.

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

Tools for the Analysis Phase
- Creating a Mission Statement
- Individual Preparation Worksheet
- Stakeholder Analysis
- Close-Up on the Competition
- PEST Analysis
- Focus Groups
- Summarising the Outcomes - SWOT Analysis

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

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

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

TOOLS FOR the Analysis Phase

CREATING A MISSION STATEMENT

A *mission statement* is a statement of your organisation's purpose. It should explain who you are and why you exist. If your organisation does not have a mission statement, it may be difficult for you to know where to start when it comes to designing an inclusion strategy. The following questions can help you to express your organisation's mission, values and beliefs:

A. What is the *focus problem(s)* that your organization exists to solve? What need or opportunity does your organization exist to resolve? Describe how the world would be improved, changed, or different if your organization was successful in solving the problem or responding to the need.

B. What is the *purpose* of your organization (this answers the question of why you exist but does not describe what you do)? Describe the ultimate result you are hoping to achieve.

C. What is your business? Describe the areas you are involved in – your primary services or activities.

D. What are the *fundamental values and beliefs* that should guide you in your day-to-day interactions with each other and with your partners? What are the major assumptions upon which your organization provides its services?

We believe:

-
-
-
-

We assume:

-
-
-
-

Our Mission Statement

(Combine the information above to create a compelling mission statement about *who* your organization is, what the organization does, and why your organization does it.)

Adapted from Worksheet 1 – Support Center for Nonprofit Management (1997)

INDIVIDUAL PREPARATION WORKSHEET

Before you begin the strategic planning process it can be useful to review your organisation's work and internal functioning. This questionnaire can help the participants in a strategic planning process to prepare themselves so that they can make a useful contribution.

☞ *Although this method is meant for individuals, consider discussing the questions in small groups.*

Thinking about our context:

1. What has happened in the past three years in the external environment that could affect our work as an organisation?

2. What are the challenges and threats facing us as an organisation in our external environment?

3. What opportunities should we be taking advantage of in order to:
   a. make us more sustainable as an organisation?
   b. help us achieve our vision?

4. What information do you have that you think is important to share with others in the strategic planning process?

Thinking about our organisation:

5. What are our most important strengths?

6. What weaknesses are preventing us from achieving our vision?

7. Do you think the organisation is are clear about its vision, values and mission? Make some notes about what you think the vision, values and mission are.

8. What challenges has the organisation failed to meet in the past two to three years and why has it failed to meet them?

9. What challenges have we (as an organisation) handled well in the past two to three years and what helped us to do so?

10. What is the most important outcome that you would like to see emerging from this strategic planning process? Why do you think it is so important?

Adapted from Strategic Planning Toolkit by Janet Shapiro (email: toolkits@civicus.org)

STAKEHOLDER ANALYSIS

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

Step 1 – brainstorm a list of all your organisation's stakeholders (remembering that stakeholders can be partner organisations, competitors, young people and/or their families and so on). Split the list into *internal* stakeholders (inside the organisation) and *external* stakeholders (outside the organisation).

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

☛ The questions in Step 3 can be adapted to measure the level of satisfaction of the members of your organisation or of the young people who take part in your activities.

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

CLOSE-UP ON THE COMPETITION

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

No matter what their situation, young people have different options to choose from (work, school, vocational training, collecting social benefits, staying home to watch TV…) Why should a young person choose get involved in your organisation? Why should they choose to take part in your activities rather than those of another organisation? To answer these and other questions it can be helpful to take a closer look at what the competitors in your field are offering.

☛ Remember: 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 and **NEVER** ask for private or confidential information (e.g. performance appraisals, internal financial information, etc.)

1. Make a short list of 5-10 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 your organisation? How are they different?
5. What profile of young person typically makes use of these activities/services?
6. Do the young people have to pay a fee or contribute in some way in order to participate?
7. How many activities are run each year?
8. How many young people take part in the activities each year?
9. Over the last 3 years, have these numbers increased or decreased?
10. Compared to each individual competitor, what are your organisation's greatest strengths (in terms of the inclusion work)?
11. Compared to each individual competitor, what are your organisation's most serious weaknesses (in terms of the inclusion work)?
12. What conclusions can be drawn? What type of action is needed to improve your organisation's position compared to your competitors?

PEST ANALYSIS

PEST stands for: **P**olitical, **E**conomic, **S**ocial and **T**echnological. A PEST analysis can help youth organisation 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 communities in future.

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

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

Political	Economic	Social	Technological
- - -	- - -	- - -	- - -

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

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

☞ The best time to do a PEST analysis is probably towards the end of your needs analysis but *before* you start to summarise the information and draw conclusions.

FOCUS GROUPS

If your organisation deals with large numbers of people (e.g. large numbers of participants, volunteer activists, partner organisations, etc.) it can be difficult to get a representative overview of people's views and opinions. Focus groups are a good method for stimulating interactive exchange on a small scale with individuals who represent their larger group.

Tips for setting up and managing focus groups

Before the group meets:
- Determine the type of profile or group you want to discuss with
- Identify the priority areas and specific questions you wish to discuss
- Consider the composition of the focus group. Avoid putting people together who already know each other. Try to compose a group who can give each other new perspectives. Try to find people who are willing to share their opinions.
- Choose an appropriate location for the meeting (not too formal nor too informal)
- Set a maximum number of participants.

- Decide who will facilitate the meeting (someone internal or external, a professional or not…? Etc.)
- Consider circulating the topics and/or questions to be discussed to the participants beforehand. Ask them to write down their ideas beforehand to reduce the influence of other participants.
- Call the participants by phone to remind them of the meeting place and time.

While the group meets:
- Establish the ground rules to keep the responses confidential
- Make sure all participants are given equal time and opportunity to speak
- Start with general questions and move towards the specific
- Direct the discussion but do not influence it
- Keep the meeting space comfortable and free from distractions

☛ You might be familiar with focus groups by another term like "round table meetings" or "discussion groups".

☛ Focus groups can provide a large amount of information but this may be difficult to synthesize or quantify. Be sure to budget adequate time for analysing the outcomes.

Adapted from the website of the NOAA Coastal Services Centre (http://www.csc.noaa.gov/needs/section_a-18.html)

SUMMARISING THE OUTCOMES – SWOT Analysis

A SWOT summary is ideal tool to use in the **final phase** of a needs analysis because it presents a concise overview of the most important positive and negative points to come out of your research.

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

Step 2 – Hang four flipcharts on the wall. Give each flipchart one category – Strengths, Weaknesses, Opportunities and Threats. Give the participants (members of the strategy team) a set of blank cards or Post-Its.

Step 3 - Ask the participants to identify the most obvious or urgent points for each category. Use the sample questions in the outline to help you decide which key elements from your analysis belong under which heading. Write out one point per card and stick the card on the appropriate flipchart.

SWOT Summary	
Strengths	**Weaknesses**
- What has been going well in our inclusion work? - What is our organisation good at?	- What has not been going well in our inclusion work? - What resources or skills is the organisation missing?
Opportunities	**Threats**
- Which new target groups can be interesting for us to work with? - What new laws, legislation or social trends offer us exciting new chances?	- 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?

Step 3 – Group similar cards together. Take away any duplicate cards. Reformulate any cards which are not clear. Try to narrow down the results to a maximum of 10 points per category.

Step 4 – As a group, agree on the final list of points in each of the four categories. Discuss the following questions:
- What can the organisation do to maximise our strengths?
- What must the organisation build or develop to overcome our weaknesses?
- What does the organisation need to do to capitalise on the opportunities?
- What can the organisation do to minimise or neutralise threats?

Step 5 - Present the SWOT summary along with the supporting information to the head of your organisation or to your board for their approval.

☛ Before you move into the Planning phase, **show the outcomes of your SWOT to your key stakeholders** (internal and external). 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.

TOOLS FOR the Planning Phase

SWOT INTERPLAY

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

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

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

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

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

- Where your strengths meet opportunities, this is the area where the organisation is strongest. This is where you should **invest**.
- Where your strengths meet threats, the organisation 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 organisation risks missing out on valuable chances in inclusion. Here you should **decide** (e.g. will you invest further, pull back, or find a way to co-operate with others?)
- Where your weaknesses meet threats, this is the area where the organisation 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 your organisation 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 your organisation's activities (opportunity)… Your organisation should **invest** in this new partnership.

EXAMPLE 2

On one side your organisation offers young people a variety of projects where they can go abroad as students, volunteers or au-pairs (strength). On the other side a competing organisation offers similar activities abroad and can find the young person a placement in less than half the time (threat)… Your organisation should **mobilize** to investigate ways they can improve their selection and placement procedures.

EXAMPLE 3

On one side a focus group of fewer-opportunity young people aged 13-18 from socio-economically disadvantaged backgrounds found your organisation's promotional brochures and booklets unappealing and ineffective (weakness). On the other side these same young people are avid users of new technology like the Internet, mobile phones, i-pods, Blackberries, etc. (opportunity)… Your organisation should **decide** whether to reduce their use of printed materials and to increase advertising via new technology.

EXAMPLE 4

On one side the number of early school leavers participating in your organisation'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 education and may no longer be used for non-formal youth activities (threat)… Your organisation needs to **control the damage** by assessing the feasibility of either involving more early-school leavers or of selecting a new profile as a target group.

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

PAIRED COMPARISON ANALYSIS

There is so much to be done in the field of inclusion that it is easy to list all the potential action areas that your organisation could spend time on. It is more difficult to decide 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 organisation's productivity or efficiency in inclusion like hiring new staff, offering internal training, improving systems and procedures, investing in new technology, etc.) and
- potential actions which are **external** (any action related to improving the impact of the organisation's inclusion work like contacting new target groups, developing new activities, partnering with other stakeholders, etc.)

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

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

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

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

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

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

EXAMPLE

A group of volunteers has designed a fun and innovative programme for informal second-language learning. Over the past year they have set up their own NGO and now run a series of weekly workshops in prisons for teenagers serving criminal sentences. These workshops have proven very successful (strength), so much so that the prison now wants the group to propose a new programme of activities in the coming year. At the same time, a second prison 100 km away wants to offer the second-language workshops to their teenagers (opportunities). However, the group receives no funding for their activities and all the work is done on a 100% voluntary basis. At the moment the volunteers have no extra time to devote to the programme (weaknesses). Recently the head of the prison gave the group members some news. A proposal has been made to the city council to only allow certified youth workers or teachers inside the prison system. This could jeopardize the programme (threat).

With limited resources, the group of volunteers can only focus on one action area at a time. The potential action areas identified so far include:

- Increasing the number of volunteers able to run the second-language workshops
- Developing a new series of activities for the upcoming year
- Lobbying the city council to prevent the passage of the new regulation
- Exploring possibilities for partnering with certified teachers or social workers in order to continue with the second-language workshop programme.

	Increasing the number of volunteers (A)	Developing a new series of activities the coming year (B)	Lobbying city council to prevent new regulation (C)	Exploring possibilities for partnering (D)
Increasing the number of (A) volunteers		A,3	C,2	A, 2
Developing a new series of activities the coming year (B)			B, 1	B, 2
Lobbying city council to prevent new regulation (C)				C, 2
Exploring possibilities for partnering (D)				

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

- **A** = 3 (20%)
- **B** = 2 (13 %)
- **C** = 2 (13%)
- **D** = 8 (54%)

Exploring possibilities for partnering with certified teachers or social workers is chosen as the most important action area (D) followed by increasing the number of volunteers able to run the workshops (A). With lower scores of only 13% each, options B and C are not high-level priorities at this time.

By the end of this exercise you should have two new lists – one shows the organisation's **internal** priorities and the other the organisation's **external** priorities. Use these lists as your reference point. If you are ever unsure about where you should best be spending your time, investing your resources or how to respond to new circumstances these two lists should provide the answers.

SETTING SMART OBJECTIVES

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

S =Specific
M =Measurable
A =Agreed upon (by everyone involved)
R =Realistic
T =Timebound

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

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

To increase the number of young people in our activities

This formulation is very vague; it more closely resembles a global aim than an objective. This organisation may want to increase the number of young people but which ones, by when and to what extent?

To increase the participation of young people from inner-city neighbourhoods in our arts, sport and remedial schooling activities

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

To increase the participation of young people from fewer-opportunity backgrounds in our arts, sport and remedial schooling activities by 50% within 3 years

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

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

EVALUATING YOUR STRATEGIC PLAN AND THE PLANNING PROCESS

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

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

The Strategic Plan	Yes	No
• Does the strategic plan provide guidance on both short-term and long-term priorities for inclusion?		
• Does strategic plan help the organisation 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 organisation'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 organisation (director, chairperson, manager…)?		
Comments and suggestions for future strategic plans:		

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

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

TOOLS FOR the Implementation Phase

OUTLINE OF AN ACTION PLAN

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

Below is an example of how to structure your action plan:

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

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

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

Objective – clearly indicate which objective you are making an action plan for. You should have a separate action plan for each of your objectives.

Task – name the specific steps that will be taken towards achieving the objective. Tasks should be written down in chronological order (start with those tasks that need to happen first).

Person responsible – assign the task to a specific individual (staff member or volunteer). Be sure both the head of the organisation and the person named approve the assignment.

Start date / End date – indicate when the task should be started and 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 organisation time. Make an estimate of the total costs or of the amount of working time needed to complete each task here.

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 your organisation to:

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

Date: _____

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

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

5. Indicate which changes need to be made in:

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

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

✖ TOOLS FOR the Evaluation Phase

OVERVIEW OF RESULTS ACHIEVED

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

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

EXAMPLE

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

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

FINAL REVIEW OF THE STRATEGIC PROCESS

Your inclusion strategy will likely 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 organisation to achieve.) The end of this period is generally a good moment to look back and review the separate phases which contributed to the development of your inclusion strategy.

(N.B. – the following questions should be used as a basis – feel free to expand the lists below as necessary 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 organisation's situation in terms of inclusion (i.e. strengths and weaknesses, opportunities and threats)?		
• Did the needs analysis provide enough information about the needs of young people with fewer opportunities (in general or in terms of specific target groups)?		
• Did the needs analysis provide enough information on the needs and expectations of key stakeholders?		

	Yes	No
• Did the needs analysis provide enough information about the NA's the organisation'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 organisation's strategic plan?		
• Were young people able to make an active contribution to the development of the organisation's strategic plan?		
• Did the strategic plan identify appropriate priorities for the organisation'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 relevant members of the organisation?		
• Was the strategic plan communicated effectively to all key stakeholders?		
• Was the strategic plan approved by the head of the organisation?		

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 those involved?		
• 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 relevant members of the organisation?		
• 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 organisation have a plan for wider dissemination of the outcomes and recommendations (beyond key stakeholders)?		
• Has the organisation 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)

HUNGER FOR MORE? – REFERENCES

FURTHER READING & ONLINE RESOURCES

Some more SALTO 'Inclusion for All' publications:

- **Going International - Inclusion for All (2004)** – practical inclusion methods and advice for preparing, implementing and following-up on international projects for young people with fewer opportunities
- **Use your Hands to Move Ahead (2004)** – using practical tasks to increase participation by young people with fewer opportunities on short term European Voluntary Service projects
- **Fit for Life (2005)** – using sport as an educational tool for the inclusion of young people with fewer opportunities in youth work and international youth projects.
- **No Offence (2007)** – exploring opportunities and setting up youth projects with young ex-offenders and those at risk of offending
- **Village International (2007)** – a practical booklet for youth workers on setting up international projects in rural and geographically isolated areas
- **No Barriers, No Borders (2008)** – practical guidelines and tips for setting up international, mixed ability youth projects (including people with and without a disability)
- **Over the Rainbow (2008)** – creating sensitive international projects with young lesbians, gays, bisexuals and young people questioning their sexual orientation
- **Youth and the City (2008)** – developing meaningful international projects with young people in disadvantaged (sub)urban areas
- **Inclusion & Diversity (2008)** – how to make your youth work and youth projects more inclusive and reach more diverse target groups (co-operation SALTO Inclusion & SALTO Cultural Diversity)

- **E.M. power (2008)** – how to empower young ethnic minority women
- **Making Waves (2007)** – creating a greater impact with your youth projects, a booklet about visibility, dissemination and exploitation of your project results
- **Coaching Guide (2006)** – a guide that explores the concept of Coaching, including practical tools, methods, advice and information (by SALTO Participation)

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

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

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

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

☞ Downloadable from www.youth-partnership.net or www.SALTO-YOUTH.net/Toolbox/

ONLINE RESOURCES

More inclusion links and resources at www.salto-youth.net/Inclusion/

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

REFERENCES

The SALTO Inclusion Resource Centre and the author would like to acknowledge the following references as invaluable resources in the preparation of this booklet.

BOOKS & PUBLICATIONS

- Albrechts, Julia, Anita Caals, Amand Dewaele, and Cor Geurs. **Van Missie Tot Strategie:** *Een handleiding voor beleidsontwikkeling in het social-cultureel werk. Brussel: Uitgeverij Politeia in samenwerking met Kwasimodo vzw,* 2004.

- Andrews, Kenneth. **The Concept of Corporate Strategy**. *Irwin: Homewood,* 1987.

- Bruce, Andy and Ken Langdon. **Strategic Thinking.** *London: Dorling Kindersley Limited,* 2000.

- De Wit, Bob and Ron Meyer. **Strategy: Process, Content, Context**. *An International Perspective (2nd edition.). London: International Thompson Business Press,* 1998.

- Gorman, Paul. **The Game of Business and How to Play It: The 21 Steps to Irrefutable Success And Great Wealth In Business.** *London: Big Sur Publishing,* 2004.
  Also available online at
  http://www.businessballs.com/freespecialresources/Game_of_Business_Paul_Gorman.pdf

- Nelson, Bob & Peter Economy. **Consulting for Dummies.** *Indianapolis, Inc.,* 1997.

- Olsen, Erica. **Strategic Planning for Dummies.** *Indianapolis: Wiley Publishing, Inc.,* 2007.

- SALTO-YOUTH Inclusion Resource Centre. **Time for Inclusion.** *Brussels,* 2006.

- Tiffany, Paul & Steven D. Peterson. **Business Plans for Dummies**. *New York: Hungry Minds, Inc.,* 1997.

INTERNET ARTICLES

- Allen, Gemmy**. Objective Setting.** *Retrieved November 10, 2007 from* http://ollie.dcccd.edu/MGMT1374/book_contents/2planning/perf_objectives/perf_obj.htm#discussion *Provides advice on the steps to take to turn goals into objectives with a description of the SMART method.*

- Chapman, Alan. **Business Plans and Marketing Strategy**. *Retrieved November 4, 2007 from* http://www.businessballs.com/freebusinessplansandmarketingtemplates.htm *Business planning and marketing tips, samples, examples and tools – how to write a business plan, techniques for writing a marketing strategy, strategic business plans and sales plans.*

- Chapman, Alan. **Quick Business Plan or Operational Plan Template**. *Retrieved November 4, 2007 from* http://www.businessballs.com/freenewbusinessplanstemplates.htm *Business planning template for new business development and operational planning reports.*

- Margarit, Alex. **Elements in the Situational Analysis.** *Retrieved November 4, 2007 from* http://marketing.about.com/od/marketingplanandstrategy/a/situationanalys.htm?p=1. *Brief overview of factors which should be taken into account when conducting an analysis.*

- Nickols, Fred. **Strategy: Definitions and Meaning.** *Retrieved October 25, 2007 from* http://home.att.net/~nickols/strategy_definition.htm. *A review of various definitions of strategy; a clarification of the concepts of policy, strategy, tactics, ends and means.*

- O'Connell, Graham. **Ask the Expert: Training Audits in "trainingzone.co.uk"**. *Retrieved November 5, 2007 from* http://www.trainingzone.co.uk/cgi-bin/item.cgi?id=171199] *Advice on conducting a training audit which can be translated into the steps needed for a needs analysis.*

- Robertson, James. **Conducting intranet needs analysis**. *Retrieved November 5, 2007 from* http://www.steptwo.com.au/papers/kmc_needsanalysis/. *Advice on conducting a needs analysis in the specific context of intranet computer systems.*

- Robinson, Ron. **The Advantages and Disadvantages of Strategic Management from ABARIS Consulting, Inc in "charityvillage.com"**. *Retrieved November 2, 2007 from* http://www.charityvillage.com/cv/research/rstrat36.html.
  Advice on understanding some of the advantages and disadvantages of implementing a strategic management system.

INTERNET RESOURCES

- **Home Office Crime Reduction College (UK).** cdrpreform@homeoffice.gsi.gov.uk **Passport to Evaluation.** *Retrieved November 22, 2007 from* http://www.crimereduction.homeoffice.gov.uk/evalpart3.pdf
  A distance learning package written and designed by staff at the Home Office Crime Reduction Centre. While the package looks specifically at the context of evaluating crime reduction projects, it presents evaluation as a vital part of the project planning and management process. The package is relevant to anyone likely to be involved in evaluating projects or initiatives, whatever their level of experience.

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

- **National Oceanic and Atmospheric Administration** (NOAA) Coastal Services Centre. *Needs Assessment Training – Assessment Methods Retrieved Oct. 23, 2008 from* http://www.csc.noaa.gov/needs/section_a.html
  A collection of seven basic assessment methods that can be used to gather data and information including focus groups, oral surveys, questionnaires, interviews, etc.

- **Shapiro, Janet.** (nellshap@hixnet.co.za). *Retrieved on October 29, 2007.*
  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.

Strategic Planning Toolkit:

http://www.civicus.org/new/media/Strategic%20Planning.pdf

Overview of Planning Toolkit:

http://www.civicus.org/new/media/Overview%20of%20Planning.pdf

Action Planning Toolkit:

http://www.civicus.org/new/media/Action%20Planning.pdf

Monitoring & Evaluation Toolkit:

http://www.civicus.org/new/media/Monitoring%20and%20Evaluation.pdf

ABOUT THE AUTHOR

KATHY SCHROEDER (Author)

http://trainers.salto-youth.net/KathySchroeder
Since 1996 Kathy has worked with young people, youth workers, educators and European institutions to explore how young people with fewer opportunities can benefit from international mobility programmes. Along with providing training and consultancy services, Kathy is frequently involved in producing resource materials on inclusion topics. Her other specialities include European Voluntary Service and using sport as a method for non-formal learning.

Contact: kathy.schroeder@planet.nl

ANN HENDRIKS (Co-ordinator & Editor)

Ann is currently working for the SALTO-YOUTH Inclusion Resource Centre. Her roots are situated into the grass root level youth work with socio- economic disadvantaged young people in Ghent, Belgium. Since 1993 she initiated in this organisation several international European projects. Afterwards she started to work for the National Agency of Belgium/Flanders. She studied social work and continued with a post-university course on 'poverty and participation' and "diversity management". Currently she is chairperson of vzw JONG, a private NGO responsible for all the youth work with young people from disadvantaged areas in Ghent,Belgium.

Contact address: SALTO Resource Centre on Inclusion, Grétrystraat 26, 1000 Brussels, Belgium
inclusion@salto-youth.net or ann@salto-youth.net

A SPECIAL THANKS GOES TO:

Tony Geudens (SALTO Inclusion Resource Centre, Belgium) for his moral and practical support and feedback.

Does your organisation work with fewer-opportunity young people? Do you have a clear vision of where you are trying to help your young people to go? Do you feel like your youngsters are being successfully "included" into society? If so… is this inclusion happening by chance… or by design?

 "Inclusion by Design" is for anyone interested in learning more about how a strategic approach can help to improve the quality and impact of their inclusion work. This booklet presents a step-by-step approach to strategy-making which can be used by youth organisations both large and small.

Developing an inclusion strategy should be a motivating process, not a heavy chore. "Inclusion by Design" aims to make strategy development more attractive and accessible and to give organisations the feeling they are doing more than just "going through the motions" in their daily work. The approach to strategy-making and the methods described here are not only relevant to the field of inclusion but can be used by anyone in almost any context.

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