TOOLBOX

FOR INTERNATIONAL PROJECTS AND PARTNERSHIPS

THE DANISH YOUTH COUNCIL

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CONTENT TOOLBOX

GENDER

ORGANISATIONAL ANCHORING

PROJECT VISIT

ADVOCACY

THE DANISH YOUTH COUNCIL

POSITION PAPER

ADVOCACY

What is advocacy all about? How to do advocacy? If you are asking yourself these questions, this paper is for you. It presents DUFs definition of advocacy – as wellas lessons learnt, ideas and tools for working with advocacy.

WHY DO ADVOCACY?

Advocacy is a systematic and strategic approach to achieve positive, lasting change – that is, a change that will last after the project ends.

As youth organizations we are working to better young people's lives and conditions. If we want to better the lives of marginalized youth, we can provide services or activities for them.

But if we want to improve conditions for young people in the long term, we need to focus on how decisions around young people's lives are made – and how we can assure that the youth who are affected by the decisions have a voice.

In short, advocacy is about persuading and influencing those, who have power and responsibility, to take an interest in your issue and act for change.

Well conducted advocacy may influence the structural causes of inequalities, shift power balances and challenge the discrimination that affect youth – and thereby contribute to more sustainable, long term changes and reach more people and areas than a single project is capable of.

> For instance, you may provide education for a small group of out-of-school youth in your project – but after the project ends, the problem of out-of-school youth continues. Instead you could focus on strengthening citizens' skills to build support for and influence people with power in the area of education to make better decisions and ensure education for all children.

WHAT IS ADVOCACY?

There are various definitions of advocacy. In DUF, we work according to this definition of advocacy:

"Advocacy is a planned, purposeful effort to advocate for, or enact influence on, a cause with the purpose to create lasting, positive changes in society. Advocacy is a process, where you turn the focus outwards".

Put simply, advocacy is a set of planned, coordinated activities designed to persuade someone else – either decision makers or someone who can influence them.

Advocacy is essentially about changing people's knowledge, attitudes and behavior.

Through different activities, organizations may influence those who have power, responsibility and authority to change a given situation. In DUF supported partnerships the focus is on making people with power care for issues that are important to young people and take actions that improve young people's living conditions.

Advocacy is an externally focused effort, in which you influence people outside of your own organization.

Advocacy can happen at many levels. Depending on your objectives, you may influence people, who have

EXAMPLES OF ADVOCACY FOCUS AREAS

Advocacy efforts can be directed at influencing different **political, economic, social and cultural processes** and **decisions**. Young peoples' conditions, fulfillment of human rights and quality of life, can for instance be improved by change in the following areas:

- **Political processes and decisions:**
  - Changes in **laws and policies** that affect young people. This could be achieved by arguing for the creation of a national youth policy or increasing the focus on youth in other polices; e.g. employment or health policies.
  - Changes in **practices** and **implementation of policies and laws** that affect young people. An example could be to suggest creative ideas to encourage youth to register and vote in elections or proposing new methods in health education to the Ministry of Health.
  - Increased **space for civil society organizations**. This could be by encouraging that civil society organizations are invited to give input to political processes or arguing for improved legal frameworks for civil society organizations.
  - Increased **transparency and accountability** in the political system. Do you know how decisions are made in politics and how you can influence political processes? An example of an action could be to encourage decision makers to engage youth more actively in political processes for instance through dialogue with decision makers and youth parliaments - or to argue for access to government data, for example public budgets and spending.

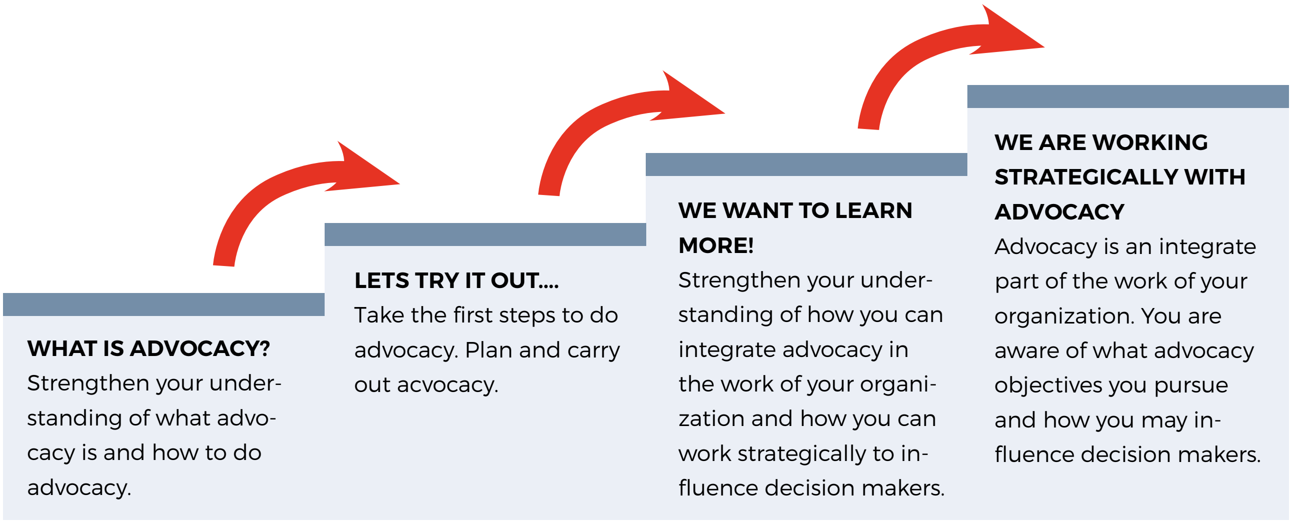
- **Social and cultural processes and decisions:**
  - Changes in **knowledge, attitudes, behavior** of specific groups or people in general. For instance you may create a public campaign against child labor or work closely with parents to influence them to send their children to school.
  - Changes in **power relationships and structures** based on cultural norms. You could for instance engage young women and men in dialogue about gender roles, power relationships and structures and work to encourage more young women to participate in decision making processes – or you could take up a public discussion of young peoples' role and influence in society.

- **Economic processes and decisions:**
  - Increased influence on political processes around the economy and corporate interests. For instance you could argue for transparency in government budgeting and spending, hold companies accountable to paying taxes or strengthen young workers in making companies live up to labor laws.

Put simply, most people do advocacy in their everyday lives when they attempt to change other people's knowledge, attitudes and behavior.

- If someone says something you don't agree with and you argue or persuade with them to change their opinion
- If you try to influence or convince someone to do something
- If you find a better way

ADVOCACY OFTEN FOCUSES ON GOVERNMENT DECISION MAKERS, but you can also advocate for changing attitudes and behavior of other power holders. When you work to influence a company to pay local taxes or an institution to promote young men and women's equal rights, you are also doing advocacy.



Source: Guidelines for Support to Civil Society, Ingelstam og Karlstedt, 2007 og CISU

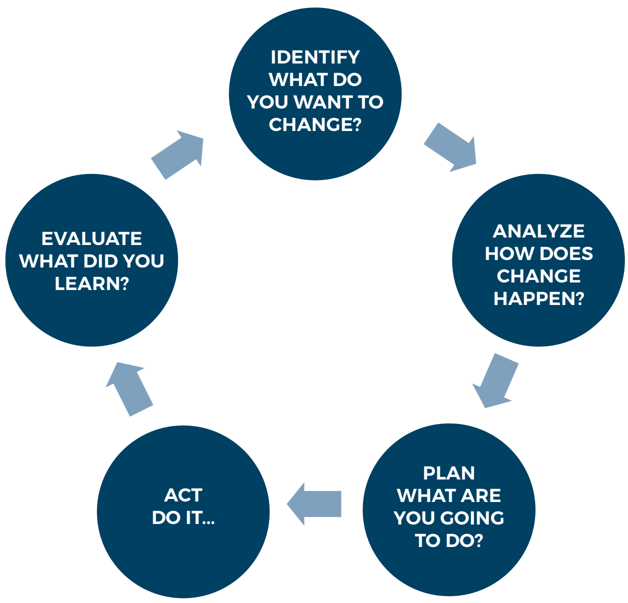
power to change a given situation – at the local, national and international level.

HOW TO WORK WITH ADVOCACY?

All DUF supported partnerships and project must integrate advocacy as part of their strategy to create change.

In our experience successful advocacy builds on a realistic assessment of how you may work with advocacy. DUF recommends that you assess the capacity, strengths and weaknesses of your own organizations vis-á-vis the issues you are working with and the context you are working in.

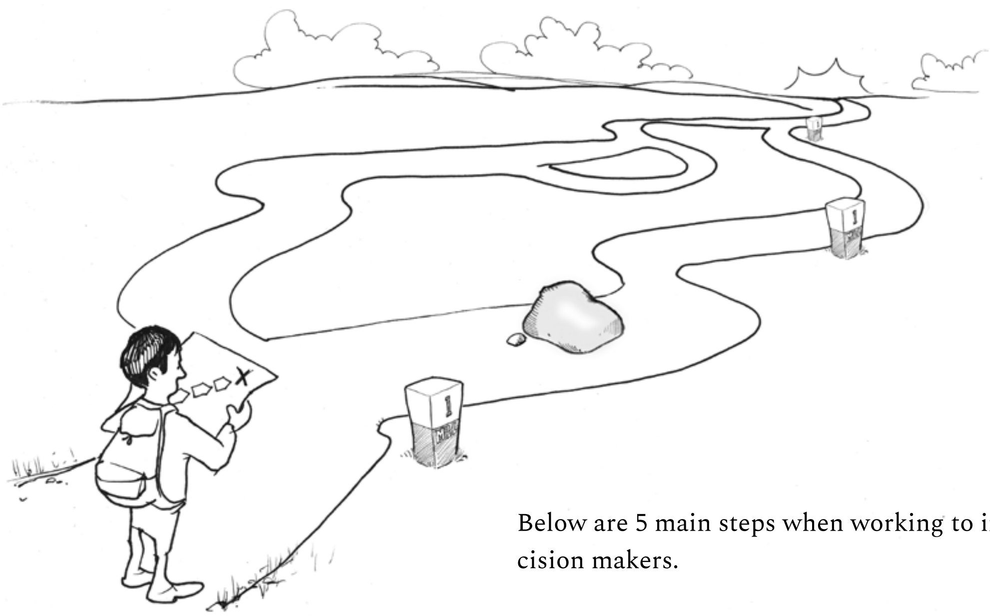
For example, if your organization is inexperienced in advocacy work, we suggest you gradually build understanding and experience on how to conduct advocacy. If your organization depends on volunteer commitment, it is important to consider the time and resources available and to what extent you can do long-term, systematic advocacy work.



When you and your organization want to improve your work with advocacy it is key to build on your existing capacities and link your advocacy work to your organizational mission, strategy and values.

DUF recommends that you share learnings about your advocacy work in the organization – to continually review your approach and ensure that new volunteers are on board.

If you don't have the relevant advocacy experience in your organization, you are encouraged to include advocacycapacity building with an external resource person, follow up meetings and internal learning seminars in your project application to DUF.



Often DUF supported partnerships start with **building organizational capacity and empowering people to work with advocacy** – before moving on to do advocacy work aimed at influencing decision makers to support positive change.

The model below shows **a gradual approach to building up the capacity** to understand and do advocacy leading on to strategic advocacy work.

5 STEPS IN YOUR ADVOCACY WORK

Advocates all over the world use similar models, when they develop strategies to guide their advocacy work. Below are 5 main steps when working to influence decision makers.

DUF recommends that you spend time on analyzing the problem you want to change, the context and the possibilities for creating change before you decide on your advocacy strategy and methods.

- **Your objectives** – What do you want to change?
- **Context, situation and timing**
- The **time**, **resources** and **the experience** available in your organization
- The **position** and **relations** of your organization to those who have power in the political landscape and the broader public
- The **possibilities** and the **space** your organization has to influence decision makers

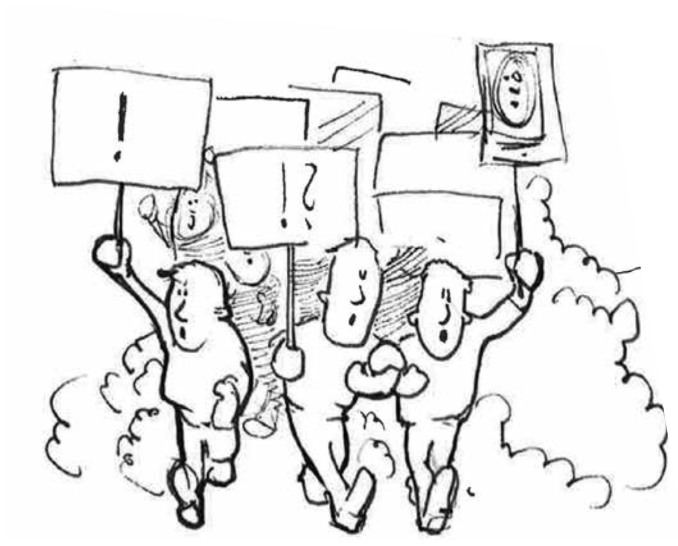
DUF recommends that you base your advocacy work on analyses of how change takes place in your particular context and in relation to your issue. Talk to DUFs consultants about **how to do an advocacy strategy** for inspiration on tools and ideas for developing an advocacy strategy.

Remember to get a clear mandate and support from the leadership level in your organization, when conducting advocacy work. You are representatives of your organization and need to ensure that there is clear support for the cause and the advocacy strategy.

EXAMPLE FROM DUF PARTNERSHIPS

Often DUF supported partnerships starts out by doing activities to empower children and youth. As part of this process, children and youth may participate in influencing decision makers or raise public awareness onan issue.

More experienced partnerships may work towards achieving political influence and change of policies or practices. Often experienced partnerships base their advocacy work on their knowledge and experience of working with a particular group of youth or a specific issue.



- How you will deal with potential risks and **challenges** When you decide on your advocacy strategy, think about how you can best contribute to change at a given time.

It is also good to consider how different advocacy approaches may work in synergy at a particular moment and over a longer period of time.

EXAMPLES OF ADVOCACY

There are many approaches to doing advocacy – and many possible tools and activities. At an overall level, you may consider to use an outsider or an insider approach – or a combination of both.

An o**utsider approach** will often aim to raise awareness of a cause among many people and engage citizens and organizations through **public campaigning** – in order to **make citizens act themselves** or **pressure authorities to take action on the cause**.

Public campaigning often make use of petitions, social media campaigns, marches and letters to decision-makers.

Often the focus is on problems, but it is recommended also to be clear about the change you want and suggest solutions.

EXAMPLE FROM PRACTICE

In Uganda, young people are creating their own youth clubs. They secure finances for their club activities through income generating activities such as small businesses. Through peer-to-peer education, the youth clubs empower youth to discuss and speak up. Straight Talk Foundation is cooperating with the Danish organization Ungdomsringen and both organizations have gained new insights on how much young people are able to achieve. Previously Straight Talk Foundation focused on youth as a target group, but now youth are more involved in designing activities and setting up clubs.

The partnership has learnt a lot about its approach to advocate for youth clubs during the project. It has worked well to talk to the head teachers first as this made it easier to gain good work relations in the school with other teachers later on. Also, the partnership found that it was a good idea to do a meeting to orient all teachers about the straight talk club operations in the new school where young people are to set up a club. Often youth were eager to setup clubs, but the partnership found that it didn't work well when the first contact with the school was through a student. In such cases, the head teachers would feel bypassed and would not be welcome to the club concept

EXAMPLE FROM PRACTICE

In 2012, the Baptist Youth of Denmark (BBU) and the Association of Baptist Youth in Rwanda (AEBR-Youth) arranged a national conference in Rwanda with a focus on young peoples' participation in the development processes in Rwanda.

Leading up to the conference, young people were encouraged to participate in society through regional leadership trainings and creative competitions in Baptist churches on the theme: 'Young peoples' rights and roles in the development processes in Rwanda'. Youth shared experiences and expressed their views on young peoples' engagement in the Rwandan society through songs, poems, theatre and storytelling. For many youth, it is a new experience to speak up for themselves and take an active part in dialogue about society.

Based on the youths' experiences and expressions, a booklet on the aspirations of the youth was published.

The Minister of Youth was invited for the national conference and the final national creative competition with the participation of government actors, NGO's and churches. This attracted national media coverage by television and radio and raised attention to young peoples' rights.

During the conference the youth did the final creative competition, delivered the booklet and proposed suggestions to the Minister of Youth. The Minister in turn expressed that he was impressed with the contributions of the AEBR youth and that he wanted to involve them in the further process of supporting young people.

BBU and AEBR Youth made an effort to invite local authorities for the regional as well as national events – as speakers and participants. In that way, local authorities got a chance to speak to the youth and experienced firsthand that youth had valuable contributions. This made a positive impact on how youth were perceived by authorities – and it reinforced the view among authorities of the value of the work of the church in society.

Also, the event had positive effects inside the church as the seniors in the church gained more understanding of that youth can make a positive difference. There is now increased support for the youth work within the church and the youth are seen as a big resource for the church and the community.

AEBR-Youth used these achievements as a platform to apply for and achieve formal recognition as an association with the National Youth Council under the Ministry of Youth.

Often this is an effective strategy to engage citizens and members – and you will often be seen as active and untainted by compromise. However, depending on your tactics and your message you may run the risk of alienating the decision makers you intend to influence.

An **insider approach** will often work through persuasion of decision makers behind closed doors. The focus is on entering into **dialogue with decision makers, influencing a particular agenda** and **finding solutions together**.

What works in a Danish context doesn't always work in a different country. It is important to know the local context and the local systems in order to decide on how you may seek influence most effectively. While examples from Denmark or elsewhere can be inspiring, it is also useful to base your advocacy on local traditions and locally recognized forms of advocacy.

Advocacy is about **defending rights** or **exposing problems** – but it is equally important to **propose a realistic solution**. When trying to persuade others, do your best to understand their needs and interest and show that you have needs and interests in common. It is about building understanding and consensus foran idea, not to impose it on others.

EXAMPLE FROM PRACTICE

The Association for Rwandan Medicine Students, MEDSAR, has worked together with the International Medical Cooperation Committee, IMCC, to strengthen peer-to-peer methods in sexual and reproductive health education. During several projects, the partnership has reached out to thousands of secondary schoolstudents and teachers - and has changed mindsets and teaching styles.

MEDSAR and IMCC started out by targeting only students with peer to peer education to create an open andfree dialogue. However, the partnership realised that in order to achieve sustainability and increase the outreach of their actions, they needed to get the teachers on board. The teachers are the ones who stay at the schools and will continue working with the pupils. Therefore the partnership also started dialogue with head masters and teachers and are also developing teaching material and methodologies for teachers.

The results and the gathered experience of the peer-to-peer education has strengthened MEDSARs recognition as a relevant actor in the field of SRH education. National and local government actors, church authorities and the university are aware that MEDSAR is doing valuable work.

MEDSAR has gradually built capacity for improved dialogue with stakeholders and decision makers – both at the local and national level. Together with IMCC, MEDSAR has been doing advocacy trainings and refresher trainings, an advocacy white book has been created and an advocacy task force has been established. The capacity building on advocacy has increased MEDSARs focus on involvement and dialogue with the Ministry of Youth, local government authorities and other health partners on SRH education.

Based on the organizations experience and ongoing dialogue with the Ministry of Health, MEDSAR has been invited to participate in government development of the curriculum and teaching methods for sexual health education. That way, the good experiences can reach many more secondary school students and teachers

Many political decisions are influenced through quiet diplomacy and by developing a trusting relationship with decision makers.

Often this is an effective strategy for influencing legislation and policies. It may also entail a risk of decision makers attempting to delay change or convert you into their field of interest.

Also, it is worth considering **cooperating** with other civil society organizations and actors, when meaningful and effective.

Advocacy requires a call to action. It is not just awareness raising – you are asking people to **do something**. In an information campaign you increase people's knowledge and ask them to change behavior. When you influence policy processes, you aim to change a policy and ask people to join your cause.

LEGITIMACY AND ACCOUNTABILITY

Government authorities and other stakeholders may challenge the **legitimacy** and **accountability** of advocacy done by civil society organizations.

Legitimacy is an important aspect in advocacy. You are going to ask decision makers and other stakeholders to engage with you in discussions on how to bring about change and hold them accountable for their actions – you need to consider: **Who are you and why should they listen to you?**

DUF recommends that you involve the children and young people you are working with in the advocacy efforts in a way that strengthens their selfesteem, support their own expression and allow them to gain concrete experience of how to influence their own living conditions.

DUF ENCOURAGES THE FOLLOWING ADVOCACY PRACTICES

Encourage **participation** – Involve different people in planning and carrying out advocacy. Each participant willbring different skills, experiences, contacts, resources and ideas. When you encourage participation of the children and youth you are advocating for, they gain a sense of ownership and an experience of being able to influence their own life.

Ensure **legitimacy** and **representation** – In order to be legitimate you need to earn the trust of the people and communities, you represent. Listen to them, develop your strategy with them, respect their opinions andexperiences and take action together.

Be **accountable** – Discuss the progress and challenges of your advocacy work openly with the people you are advocating for and with.

Act **peacefully** – Violence does not produce sustainable, long-term solutions. Peaceful, constructive advocacy will earn you trust and respect of both supporters and opponents.

Remember to analyze your own legitimacy base before starting your advocacy work. Ask yourself:

- "**What is the cause of your organization**"? Often civil society organizations base their engagement with an issue on the basis of their beliefs or values – or on evidence that there is a need to take action on an issue.
- "**Who do you represent?**" Who are you speaking up for and how do you involve the people, you represent?
- "**Do you know what you are talking about**"? Often the advocacy will be stronger if you base your message on evidence or expressed concerns among the people you are advocating for. For instance medicine students and doctors work with health issues on a daily basis and youth social workers know of the conditions of marginalized youth.

ROLES OF AN ADVOCATE

It is important to consider your own role and relationship to the people you are advocating for or with. Be sensitive to the needs and desires of the people, so that you together decide on a role and a relationship that suits the situation and the group of people.

Represent – Speak on behalf of the people
Accompany – Speak with the people
Empower – Enable people to speak for themselves
Mediate – Facilitate communication between people
Model – Demonstrate behavior to people or authorities/decision makers
Network – Build coalitions

Inspired by DCA (2010)

You can do a stakeholder and power analysis to explore who will support you – and who may oppose your cause or hold you back.

It is recommended to do a context analysis, an organizational assessment and a risk assessment in the partnership with a focus on what is realistic and possible for the partner organization to do in a given context. Depending on your risk assessment, you candecide on how to manage challenges and risks.

In some countries, governments and other authorities are hostile towards civils society organizations that engage in 'advocacy'. In such contexts, it is recommended to use a constructive dialogue approach rather than confrontation – and to describe your work in terms such as: stakeholder engagement, dialogue with stakeholders, relationship building, influencing. Campaigning language can be problematic as it often draws on military metaphors (targets, allies, opponents, tactics). Using alternative language and metaphors can help smooth discussions on influencing strategies.

Likewise, in some countries, civil society organizations funded by foreign donors may be seen as driven by 'foreign interests' and may provide governments with ammunition to discredit an advocacy issue or an organization. A strategy may be to ensure that you can account for your legitimacy to speak up for a specific cause.

It is equally important to be able to explain to whom your advocacy work is **accountable**. Be prepared to answer questions about how your organization is governed, how decisions are made and how you involve beneficiaries and members. If you claim to be representing others, there are some basic questions to ask yourself: "Have they asked you or approved of that you advocate for them? Have they given input to your position and your work? Are they happy with your strategy"?

WHAT ROLE ARE YOU PLAYI NG?

When planning and doing advocacy, there is sometimes a lot of focus on **what** method, framework or tool is used and not enough on how the **process** is done. Remember to consider who shall be involved and how you may encourage people to question, analyze, learn and use the lessons learned in your forward advocacy efforts.

You can do advocacy for and with a group of people – and you can also **strengthen people in advocating their own cause** with authorities.

In some cases, where civil society space is restricted it may be safer for organizations to speak on behalf of a group of people than for the people to do their own advocacy. Civil society organizations may also have greater and faster influence with powerful actors.

When you do advocacy on behalf of a group of people, it is a good idea to consult the group on the solutions that you put forward and the strategy you pursue. Do the people agree with you?

Be careful not to dominate or drive the process as you often have the money, the knowledge and the status – and acknowledge when there is a difference of opinion. It is also important to consider the role and division of responsibilities between the organizations in the partnership.

Often the partner organization will be conducting advocacy in their own country and context – and the Danish organization may support the work through exchange of experiences, support in capacity building efforts and activities and network.

It may be beneficial to do advocacy both at the international level and at the local or national level in the country of the partner organization in order to reach decision makers, whose decisions impact internationally. In this regard, the Danish organization can play a more active part in conducting advocacy.

ADVOCACY CAN BE DIFFICULT

When you do advocacy you may run into challenges and frustration along the way. You may encounter people, who are hesitant towards your ideas as well as people who are actively working against your ideas.

Consider and assess the potential **challenges** of doing advocacy – when you plan your advocacy, when you do advocacy and when learning from the experience.

If you are working in a **politically difficult context**, you should also consider potential risks of doing advocacy.

When you challenge those in power, your organization may risk its reputation, its relationships and financing sources – and there may be legal and physical risks to staff, volunteers and target groups.

If your advocacy approach is based on building relationships and engaging in constructive dialogue and persuasion with stakeholders and decision makers, it will entail less risk than confrontational advocacy approaches. DUF encourages a constructive, dialogical approach to advocacy.

It is important to remember that the partner organization is the expert on the social and political situation in its own context. Often the partner organization will be conducting most of the advocacy work – and will also be the most vulnerable organization in the partnership in case of advocacy in fragile and politically challenging contexts.

LEARNING, MONITORING AND EVALUATION OF ADVOCACY

During your advocacy work, there are often changes to the context, the power relationships and the people you are trying to influence.

It is a good idea to monitor what happens along the way, consider the effectiveness of your strategy and adjust if needed.

As part of your project, you are required to report back to DUF to what extent you have contributed to change. Often it is difficult to determine whether others acted differently because of you – and they may not openly attribute their changed mindsets or actions to your advocacy work.

DUF recommends that you consider how you may measure the success and the quality of your work.

Rather than focusing on measuring decision makers changed opinions, it may be more meaningful for you to focus on setting goals and evaluating changes in these areas:

The changed capacity and lessons learned in the organization in regards to advocacy

- What new capacity is now present in the organization?
  What has been the outcome of the new knowledge and capacity in relation to the advocacy work of the organization?
  What have you done to anchor the capacity and the lessons learned in your organization?

The actual advocacy activities that have been carried out and the **immediate outcomes**.

- Have you conducted meetings with decision makers? How many? How was your message received by decision makers? Did they comment on it or make any commitments? Have you followed up? Have there been concrete actions after your meetings? What has happened?

The longer term indications of **impact**

- Are there new tendencies or indications that something is changing? Have you for instance noticed that there is more attention to your issue in the media or among the people you work to influence?

It is recommended to focus on learning from your advocacy work – and sharing lessons learnt in your organization. When you document the experiences, think about how you may use the experiences for future advocacy work.

You may for instance do case studies, Most Significant Change Stories and do team self-review processes, so that you share the learning in your organization.

Please confer with the toolkit paper on **Learning, monitoring and evaluation**.

TOOLS RECOMMENDED BY DUF

There are a wide range of tools to support you in creating effective advocacy strategies. The relevance of the tools depends on how experienced you are in doing advocacy, where you are in the process and what approach you are taking to advocacy.

We have chosen simple and efficient tools, that are easy to understand and use – and we encourage you to tailor and develop the tools according to your needs.

Understanding advocacy
When you have done your problem analysis, **the Change Triangle** is a powerful tool to visualize and start a dialogue about your change objectives – and the interplay of your children and youth activities, organizational capacity development and advocacy in your project.

Advocacy is essentially about changing people's knowledge, attitudes and behavior. Use the tool Know, Feel, Do to get a basic understanding of what advocacy is about and develop objectives for your advocacy.

When designing an advocacy strategy
When designing an advocacy strategy, there is a wide range of tools that may be useful to you. If you are less experienced in working with advocacy, we recommend you talk toone of DUFs consultants on **how to do an advocacy strategy** to help you plan a strategy workshop and decide on relevant tools.

When planning meetings with stakeholders and decision makers
Advocacy is essentially about changing people's **knowledge**, **attitudes** and **behavior**. You can use the tool **Know**, **Feel**, **Do** to analyze and reflect on the changes you are aiming towards. We recommend you tailor your message according to the stakeholder or person you are aiming to influence. Prepare for meetings with stakeholders and decision makers by going through the tool on **Dialogue with decision makers**.

FURTHER INSPIRATION...

Meet up with DUFs consultants
DUF can provide inspiration on how to design capacity building workshops and strategy processes, supply tools and give advice on your advocacy strategies.

Consider to make use of local consultants to build capacity in the partnership and in the partner organization

RECOMMENDED TOOL KITS

- INTRAC: Trainings, Tools and Praxis Papers
- The Right To Influence - Tematisk Forum (2009). Case stories based on the work of Danish NGOs and partners
- Critical Webs of Power and Change – Action Aid (2005). Beautiful Trouble : Creative approaches to working with advocacy
- Manual til Advocacy (in Danish). Fagligt Fokus 2014
- The ABC's of Advocacy – Dan Church Aid (2010). Based on the Advocacy Expert Series Module and focused on influencing political processes.
- Advocacy Expert Series Module 1-5 - PACT Cambodia / Dan Church Aid (2004)
- Tearfund Advocacy Toolkit (2002). Especially relevant for faith-based organizations.

This paper presents DUFs definition of advocacy – as well as ideas and tools for doing advocacy.

Our most important advice is to tailor your advocacy approach to your own organizational setup, the work of your organization and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to how you should conduct advocacy. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

TOOL

HOW TO DO AN ADVOCACY STRATEGY

WHY

The chances for success are bigger, when you think through how you are going to achieve your advocacy objectives.

A good advocacy strategy sets a clear change objective and gives direction for your work. That makes it easier to get everyone on the same page and make decisions.

WHEN

Make an advocacy strategy at the start of your advocacy work to guide your efforts. Use your advocacy strategy as dynamic tool – reflect on your approach regularly and adjust your strategy when necessary.

HOW

There are a lot of tools to support you in creating effective advocacy strategies. The relevance of the tools depends on how experienced you are in doing advocacy, where you are in the process and what approach you are taking to your advocacy.

In this paper we have chosen simple and efficient tools, that are easy to use – and we encourage you to tailor the tools and the process according to your needs.

Base your strategy on a thorough analysis

In our experience, a thorough analysis is the basis of good planning – and good planning contributes to making an effective strategy.

Change happens differently in each context – and effective advocacy is based on a good understanding of the local context and your own organizational capacity, the issue you are working with and the power dynamics that are at play in relation to your issue.

How does change happen?

Based on your analysis of the context, the issue and the power relationships at play we recommend you to think through how change may happen.

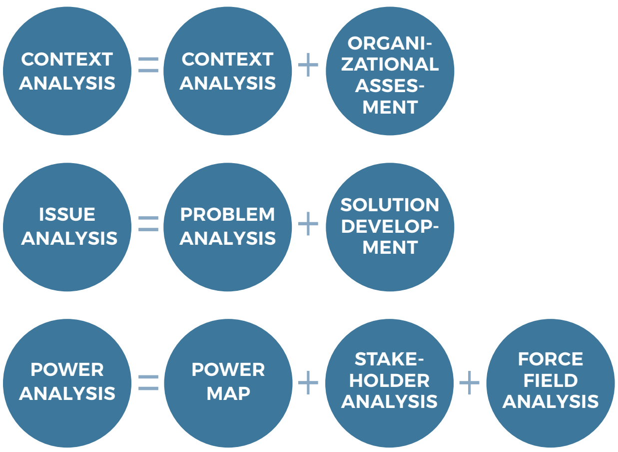
It can be useful to map out the way to change as a road-map – a visual or written presentation that shows the change objective and your way to reaching it.

A road map is useful for getting the bigger picture as well as the many small steps along the way – and it can help you question your assumptions and logic about how the change is going to happen. What can you realistically influence?

How to make an use a strategy

It takes time to do a thorough analysis, formulate a strategy and craft a concrete action plan.

If you have little experience working with advocacy, DUF recommends you to spend one or two days on a workshop focused on making a thorough analysis and talking through your strategy and making an action plan.



The analyses above are helpful when you plan your advocacy work.

> It can take a long time before you achieve the change you aim for. Consider how smaller changes can build towards the long term goals that you are trying to achieve – and remember to celebrate the small changes you achieve.

ELEMENTS OF A STRATEGY	CONSIDERATIONS
Background and problem	Draw on your context and problem analysis
Change objectives: The change you want to see and the changes you want to see along the way.	Draw on your solution development, Know, Feel, Do
Key influencing strategies	Draw on your Power Map, Stakeholder Analysis, Force Field analysis, Organizational Assessment and Advocacy Road Map
Core message	Know, Feel, Do
Action plan	Think about your activities, resources and timeframe
Risks and assumptions	Consider the risks, challenges and assumptions based on your analyses. Consider how you will avoid or mitigate risks and challenges.
M&E plan	Consider how you make sure you reflect on how your strategy is working and how you document learnings and outcomes.

On the next page, we have given suggestions for how you can structure a workshop as well as tools that can help you to start good conversations.

You can use the format below to plan a 1 or 2 day workshop – it may be rushed to go through all the tools and you may decide to spend more time to flesh out the analyses either in a longer workshop or in a smaller advocacy task force.

SUGGESTION FOR AN ADVOCACY STRATEGY WORKSHOP

THEME	PURPOSE	ACTIVITIES	TOOLS
Introduction	Introduction and framing		
Why advocacy	Create shared understanding of advocacy	Reflection on what advocacy is and how advocacy can support organizational goals	Change Triangle Know-Feel-Do
Analysis for advocacy	Shared understanding of the context and the organizational capacity, the causes and consequences of the problem, the changes you want to see and the power relations at play	Work through each tool to reflect upon the problem you are trying to solve, the change you want to see and analyze the conditions for creating change.	Context analysis, problem analysis, solution development and relevant power analyses.
Road map	Shared understanding of how change may happen	Draw up a road map – and question your assumptions and logic about how the change will happen along the way.	Advocacy road map
Action planning	Draft action plan with activities clearly linked to analysis of change	Use the road map to think through activities and use a timeline for scheduling activities	Advocacy road map
Next steps wrap up	Shared understanding of next steps and areas of responsibility	Reflect and decide on the next steps and assign responsibilities	Timeline

THE DANISH YOUTH COUNCIL

TOOL

CONTEXT ANALYSIS FOR ADVOCACY

WHY

Change happens differently in each context – and effective advocacy is based on a good understanding of the local context and the issue you are working with. The history and the social, political, cultural, economic and environmental conditions of a country or a region shape:

- The **likelihood of change** taking place
- The **positions**, **ideas** and **values** of the organizations and individuals with an interest in change
- The **effectiveness** and **potential impact** of different activities or tactics.

If you understand the context better, you can create a more effective advocacy strategy and have a better chance of making a difference.

WHEN

Do a context analysis, when **analyzing your issue** and **planning** your advocacy. Be aware of changes to the context **during your advocacy** and consider if you need to rethink your advocacy strategy.

HOW

Focus on your issue, think through the relevant questions in column 2 and answer the question in column 3 on how the context analysis influences your advocacy strategy.

CONTEXT	SUGGESTED QUESTIONS	WHAT ARE THE IMPLICATIONS ON YOUR ADVOCACY STRATEGY?
Political	What kind of political system are you working in? What are the political priorities for the current government? How open is the policy making system? How responsive is the policy making system to civil society? How free is the media? And how responsive is the media to civilsociety? When are the next elections?	
Economic	What is the current economic situation in your country or local area? What are the current spending priorities of the government? Of specific groups?	
Social / Cultural	What social or cultural factors affect your issue? Are there particular social groups that are affected either by the problem or the solution you might propose?	
Technological	Are there any technologies that may help or hinder your advocacy strategy	
Legal	What are the legal frameworks that apply to your issue? Are there international conventions or national constitutional provisions which are relevant? Is there relevant legislation?	
Environmental	Are there key environmental / ecological factors that need to be considered that are linked to your issue? Are there key international organizations and players that affect the issue?	
International level	Are there relevant conventions, guidelines or policy processes at the international level?	

THE DANISH YOUTH COUNCIL

TOOL

ORGANIZATIONAL ASSESSMENT ANALYSIS

WHY

When you attempt to influence political processes, public opinions or practices, it is important to analyze if your organization is ready for the task.

Effective advocacy work often requires that multiple parts of the organization are able to work together and that you have the necessary resources. Competent and effective **leadership** as well as **management of resources** are key.

It is important to be able to navigate in a changing landscape and adapt your advocacy to new situations, shifting power constellations and openings for change. Keep an eye on what happens on your issue and **analyze** and **adapt your activities** along the way.

Likewise it is key to have or develop the capacity and skills needed to dialogue with decision makers, engage the media or involve the members of your organization.

WHEN

The organizational assessment analysis is an internal context analysis. Use it in the **planning** of your advocacy work – in combination with your context analysis, your problem analysis and your formulation of an advocacy strategy.

HOW

Ask yourself the following questions. Remember it's a learning journey – and that you can reach good results without scoring high marks in all aspects. The score card is intended as a tool for dialogue on how your organization is doing to make you reflect on, how you can improve your work.

The contexts and form of organizing differs with each organization. If you disagree with some of the statements or if they are not relevant to you, you decide on whether or not you want to consider it.

LEADERSHIP	WE ARE DOING GOOD!	WE ARE OK, CAN DO BETTER	WE NEED TO IMPROVE
Is there a clear link between the objectives of your advocacy and the overall strategy and work of your organization?			
Is there a shared understanding of the advocacy objectives and strategy in the board and the management? Among members?			
Do you have the backing of the board?			
Do you know the needs and interest of your members and/or beneficiaries? Do you have the backing of your members and/or your beneficiaries?			
Is there acceptance of that advocacy work may entail challenges, external critique as well as failures?			
Do you celebrate your successes and involve your members and/or target group in celebrating?			
Are you good at creating and maintaining external network connections and mobilize resources and support for your issue?			

LEADERSHIP	WE ARE DOING GOOD!	WE ARE OK, CAN DO BETTER	WE NEED TO IMPROVE
Have you got clear plans for how you organize and coordinate the advocacy efforts?			
Do you have sufficient financial and human resources?			
Are you able to calculate the costs of your advocacy work and weigh it up against the impact of the advocacy work?			

ANALYZING AND ADAPTING ACTIVITIES			
Do you have a nuanced picture of our present and potential collaborators, their opinions and interests in co-operation? Have you considered when/where cooperation is effective and relevant?			
Do you know your own strengths and resources?			
Do you have a good and updated understanding of decision making processes, tendencies, challenges and threats in relation to your issue?			
Do you regularly monitor and reflect on how your work is going andif you need to adjust our strategy?			
Can you act quickly if new opportunities appear?			
Are you able to draw on personal and financial resources from other parts of your organization?			

CAPACITY AND SKILLS TO DO ADVOCACY			
Do you have a communication strategy and messages adapted to each key decision maker or stakeholder?			
Are you able to 'read' the interests of key decision makers and stakeholders and put forward your arguments in a convincing way?			
Do you have a good understanding of the decision making systems and processes you are trying to influence?			
Do you have access to and good relations with the media?			
Do you have a thorough understanding of the issue you are working with?			
Do you have the skills to involve your members and beneficiaries?			

TOOL

THE PROBLEM TREE AND DEVELOPMENT OF SOLUTIONS

WHY

It is important to understand the problem that you are addressing to come up with effective solutions.

A problem analysis can help you to:

- **Understand** the problem more in depth and design a more effective strategy.
- **Visualize the links** between the main problem, the consequences of the problem and the root causes.
- **Analyze** the **root causes** of the problem in order to decide where to focus your work to change things.
- Provide **evidence** to convince others of the validity of your analyses and argument.

The problem analysis and the development of solutions is useful both for overall project planning and for working with advocacy as part of your project.

WHEN

Do a problem tree and a solution analysis in order to **understand your issue** and **plan** your work. Be aware of changes to the context that affect the issue **during your project** and consider if you need to rethink your strategy.

HOW

A problem analysis is about deepening your understanding. If you do it together as a **team** or as part of a **participatory workshop** you get more views of the problem and jointly strengthen your understanding.

The **problem tree** helps you to visualize and analyze the links between the main problem, the resultant consequences and the root causes.

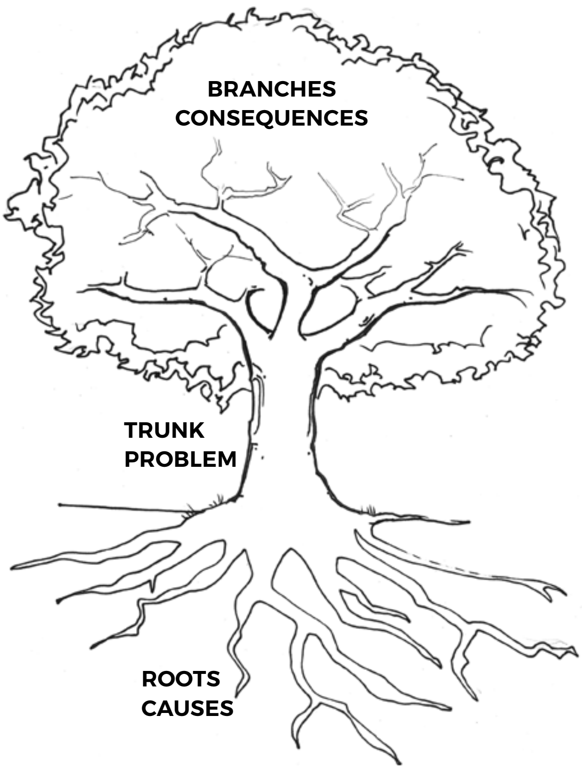
- Write the main concern/problem in the centre of a large sheet of flip chart paper. This will be **the trunk** of the problem tree.

- Add the causes of the problem below the main problem.

The causes form **the roots** of the problem tree and can grow deep and connect to each other, depending on the problem.
You can either write directly on the flip chart or use post-it notes in order to move the causes around as necessary. Use arrows to show the relationship between the root causes and the problem.

- Draw arrows leading upwards from the main problem and add the various consequences of that problem.
These are **the branches** of the tree. For each of these consequences you can branch out to any further consequences.

- Keep adding causes and consequences with arrows showing how they contribute to each set of roots and branches until you can think of no more. You can also look at **the soil**, that the tree grows in – are the



KEEP ASKING "WHY?"

The children are not going to school – why?
Their parents do not want to send the children to school – why?
The parents say that the teachers are not there – why?
The teachers have not been paid their salaries from the local government – why?
The education official says the municipality has not received the funds set aside for education from the provincial government – ... and so on.

It is important to assess the underlying root causes of a problem. Maybe the initial analysis of the problem shows that the parents don't want to send the children to school. A deeper analysis of the problem might reveal that the cause of the problem is to be found in that the teachers have not received salaries and that there are several reasons for this; maybe the area is not prioritized by the provincial government or maybe there are delays in the release of budgeted funds for education in the province. An even deeper analysis may reveal structural constraints such as the debt burden on the national economy preventing sufficient spending on education.

The repeated asking of the question "why?" helps you to dig deeper and analyze the problem in depth.

roots nourished, is it fertile soil for the problem? It can be useful to summarize your findings of the problemand its consequences and present it along with your suggestions for solutions.

It is good for motivating your choice of strategy in a **project application**. And the problem analysis and your proposed solution can form the basis for your core message in an **advocacy campaign**. It can be used in policy briefings, to motivate campaigns or in a meeting with a decision maker.

When you design your project or make an advocacy strategy, it is important to think through the **solutions to the problem**

- What solution would address the root causes you have identified?
- What needs to change?
- Who can help bring about the change e.g. the government, the parliament, local traditional authorities, parents or somebody else?
- What attitudes and behaviors need to change?

EXAMPLE OF A PROBLEM SOLUTION STATEMENT AS A CORE MESSAGE

A large part of the children in our municipality are not going to school due to parents concerns of the quality of school. Often teachers are absent and the children are then left on their own with no adults to teach them. The teachers complain that they have not been paid their salaries from the local government and therefore have to work other jobs. The delay in salaries is due to that the municipality education office has not received the funds set aside for education from the provincial government. The consequence of this is that the futures of a large number of children are compromised and that teachers and parents alike are frustrated.

This is a recurrent problem in our municipality. It is time for the provincial government to ensure that the provincial funds for education are distributed in time to the municipal education authorities.

This tool paper is inspired by material developed by INTRAC

Test your solution to ensure that it is a realistic task you set for yourself

- Is your solution realistic? What can you and your organization realistically do to achieve this change?
- Can it be implemented with reasonable expenses?
- Is your solution simple and easy to understand?
- Could your solution achieve results within the time frame of your project?
- Who will like your solution or be opposed to it?
- Are there other solutions to the problem that are more practical than your initial idea?

SET CLEAR GOALS

It can be difficult to reach your goal in a project or with an advocacy strategy, when:

- The problem is not clearly defined
- There is little understanding of what creates the problem and what the solution might be
- There isn't sufficient people, who find the problem and the solution serious and necessary enough to prioritize

Source: A new weave of power, people and politics

THE DANISH YOUTH COUNCIL

TOOL

POWER MAP AND STAKEHOLDER ANALYSIS

WHY

When you want to bring about change, it is important to know how different stakeholders and people with power may influence your work, how they make decisions and how you can influence them to be positive towards your issue.

The **power map** is a useful tool to:

- Help identify, who have an interest in your issue, who has power and analyze relationships between stakeholders.
- Help identify how you can get access to or influence stakeholders directly or indirectly.
- Visualize where your organization sits in relation to stakeholders

The stakeholder analysis helps you to:

- To understand **who agrees** with your position and **who opposes** it.
- To analyze and **understand the interests** of the stakeholders so that you can **adapt your messages** and **activities** to maximize impact.
- To find out **what further information you need**.

WHEN

Do a power map and stakeholder analysis when you **plan your project or** your advocacy work. Be aware of changes to the power dynamics that affect the issue **during your project** and consider if you need to re-think your project or advocacy strategy along the way.

HOW

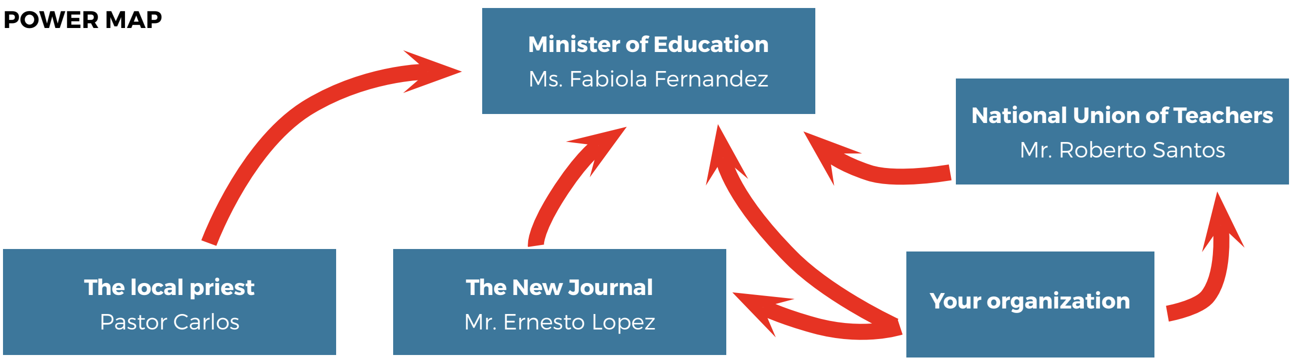
The **power map** shows you a range of paths to influence a central decision maker on your issue.

- Start with a large sheet of paper and write the names/titles of key decision makers and key stakeholders with an influence on your issue.
- Add the people who are closest and most influential to the key decision maker and the key stakeholders and draw arrows to represent their relationships.

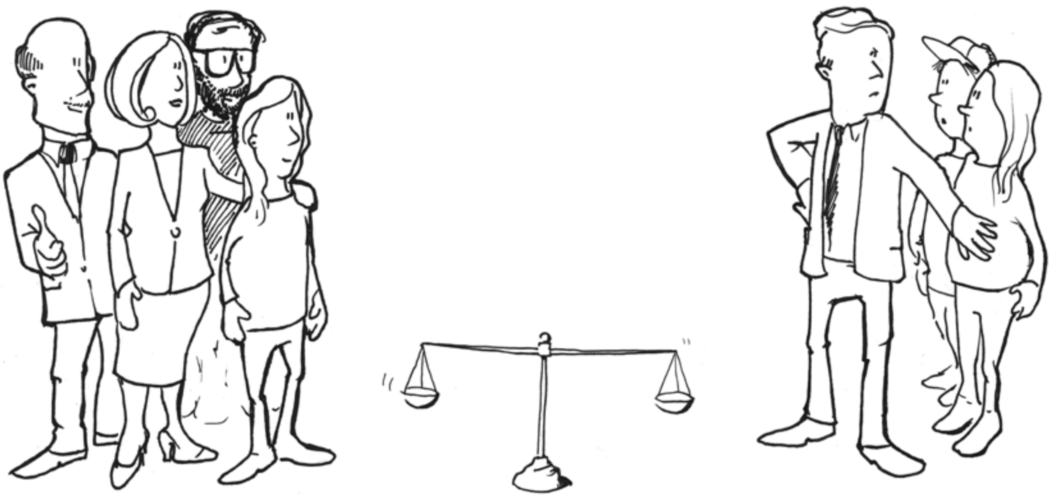
Through the **power map** you can see potential entry points to influence.

The **stakeholder analysis** can then help you to identify the most effective entry points and strategies to influence key decision makers.

POWER MAP



- Start out by listing or mapping the stakeholders that are involved in your issue and would need to be involved to create the change you want to see.
- It is important to identify individuals within the institutions and organizations. You influence individuals and not institutions or organizations as a whole.
- Then analyze whether the stakeholders you have identified are your key decision makers, allies, opponents or neutral to your issue.



Allies *Opponents*

EXAMPLE OF A STAKEHOLDER ANALYSIS

INSTITUTION/ INDIVIDUAL	TYPE OF STAKEHOLDER	ANALYSIS
Ministry of Education **Minister of Education.** Ms. Fabiola Fernandez	Key decision maker, neutral	Has made speeches on the need for quality education – but is also battling for finances for education with the Ministry of Health. Is ambitious and may be interested in an issue that will increase her popularity and profile.
National Union of Teachers Mr. Roberto Santos	Key stakeholder, ally	The teachers association primarily focuses on pay and conditions for teachers
The New Journal Correspondent on social issues Mr. Ernesto Lopez	Influential person Potential ally / neutral	Mr. Lopez writes a weekly column on social issues. It is difficult to know what his position is on this issue and if the feels priorities should be different. He likes to write case stories with a strong example, so we could provide him with these.
The local priest Pastor Carlos	Influential person Potential ally/opponent	The priest is reluctant to recognize the girls right to education, but he is a close friend of the provincial

UNDERSTAND THE DECISION MAKING SYSTEMS AND PROCESSES

If you are working to influence people with power it is a good idea to analyze the decision making systems and processes to find out when you can influence decisions – and how.

If you are working to influence policy maker, ask yourself:

- How and when are policies developed? When are the decision makers open for input?
- How and when are the budgets decided?
- Can you foresee any likely developments in the political space or processes when change is more likely to occur, for example during changes of leadership?

Likewise, if you are working to change attitudes or behaviors in other systems, analyze how attitudes are formed, how decisions are made and by whom.

This helps you to identify, when and where there is openness for input and change.

MANY WAYS OF INFLUENCING DECISION MAKERS

There are many paths to influence.

In the case of 'teachers delayed salaries' resulting in absent teachers and little quality of education, there are many ways of influencing decision makers:

- You can request a dialogue meeting with a decision maker – e.g. the education minister
- You can get the press interested and make them cover your issue so the Minister, relevant politicians or the provincial governor take an interest in the issue
- You could engage a parliamentary committee on 'quality in education', which will raise the issue with the Minister
- You could engage religious leaders to influence the provincial governor, who go to their church
- You could form an alliance with a professional association (e.g. the teachers union), parents associations or a local/international education civil society network.
- You could do a public campaign to raise attention to the importance of teachers in achieving quality education and get parents to voice their concerns.

The most effective influencing strategy may be a combination of some of the above – or other ways of doing it.

TOOL

FORCE FIELD ANALYSIS

WHY

The force field analysis is a method for listing, discussing, and evaluating the various forces for and against a proposed change. It can help you

- Determine if a proposed change can get **needed support**
- **Identify obstacles** to successful solutions
- Suggest actions to **reduce the strength of the obstacles – restraining forces**
- Suggest actions to **strengthen the supporting forces**.

WHEN

Do a Force Field analysis when you **plan** your advocacy work. Be aware of changes to the power dynamics that affect the issue **during your advocacy** and consider if you need to rethink your advocacy strategy.

HOW

Start out with a well-defined **objective for change**

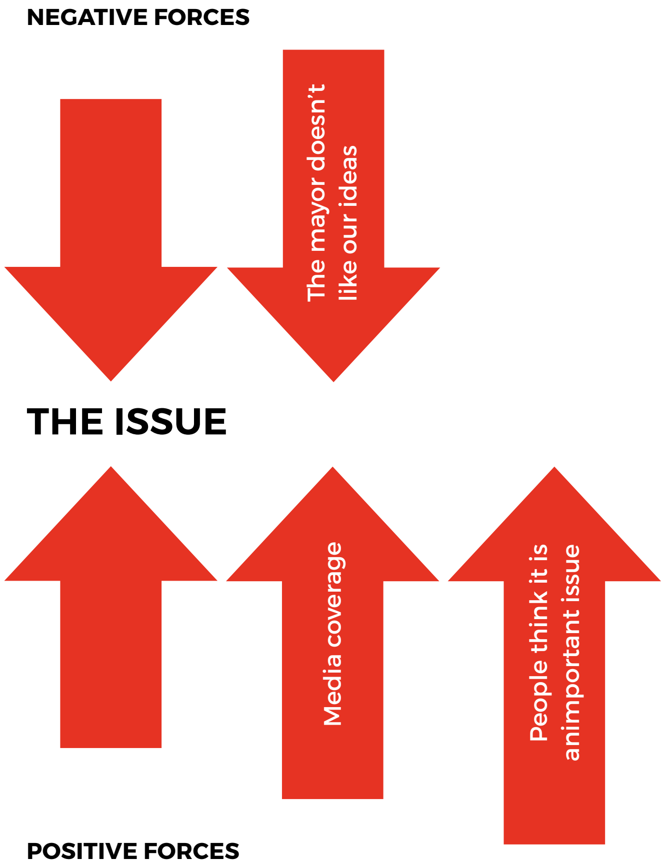
Draw a **Force Field diagram**, see the illustration. Write the goal or change to be implemented at the center a large sheet of paper. Draw a line through the middle of the paper, and label the left column “Supporting forces” and the right column “Restraining forces”.

Brainstorm a list of **supporting** and **restraining forces** in relation to your change objective and write them in diagram. You can consider the following types of forces:

- Human and financial resources
- Social and cultural norms
- Vested interests
- Political climate, power relations and policies
- Institutional / organizational culture and power relations
- Support or opposition from key stakeholders
- Key events.

Once the **supporting** and **restraining forces** are identified, ask the following questions:

- Are the forces valid? How do we know?
- How significant are each of them?
- What are their strengths?
- Which ones can be altered? Which cannot?
- Which forces can be altered quickly? Which ones only slowly?
- Which forces, if altered, would produce rapid change? Which would produce slow changes in the situation?
- What skills and/or information is needed and available to alter the forces? Can we get them?



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TOOL

ADVOCACY ROAD MAP

WHY

When you design your advocacy strategy, it is good to think through how you think change will happen. This is sometimes called a Theory of Change or an advocacy storyline –here we call it an advocacy roadmap.

The roadmap is a visual or written prese ntation that shows the change objective and your way to reaching it. It needs to show your activities, the stepping stones to change and the change you are trying to achieve.

A road map is useful for getting the bigger picture as well as the many small steps along the way – and it can help you question your assumptions and logic about how the change is going to happen. What can you realistically influence?

WHEN

The roadmap is useful in the **planning** of an advocacy strategy. Also, it is a useful dialogue tool for reflecting upon and monitoring change **during your advocacy work**. Go back to the theory, when you **evaluate the effectiveness of your strategy** and use the lessons learnt for future advocacy activities.

HOW

Draw on your context, problem and power analysis and start out by making an overall reflection on how change happens in relation to your issue.

- **How is change likely to take place?** Are people in power, organizations and institutions open for change – or is change likely to require disruption or contestation?

- **What alliances could drive or block change?** Are there sympathetic officials or politicians, journalists, leadership figures or civil society organizations that are relevant to consider?

- **Can you foresee any developments in relation to your issue** that may help or hinder your work? For instance elections, changes of leadership, changing popular opinion?

Make your own **advocacy roadmap** by asking yourself the following questions:

- What is **the overall change** that you want to see? What would the newspapers write if your advocacy strategy succeeds?

- What **activities** will you do to achieve that change?

- What are the **stepping stones to change** (the outcomes or milestones) that indicate progress toward your overall change?

Use '**So that…**' to show a chain of events, a story line, to demonstrate how one action will be linked to another.

Here's an example:

There are youth representatives in the municipal councils in our province, but as it is now, it's only youth that has been appointed by the mayor who represent youth interests in the municipal council. The appointed youth don't represent anyone or respond to anyone.

We are going to invite the Provincial Director of Youth and Sports to meet us about our issue of creating democratic elections for youth representatives in each municipality in our province, so that the elected youth actually represent the broader youth…

> You can work from the activities to the change objective to test your logic – or you can work backwards from the change objective and explore what actions that could possibly lead to change.

So that…

- The Provincial Director of Youth and Sports is aware of this issue, he understands that there is a growing demand among youth for being involved, and we can present our ideas for action…

So that…

- He can take up the issue in his department and with the Provincial Governor to see if our province can test the idea of setting up democratic youth elections at municipal level…

So that…

- The Municipal Administrations are asked to organize youth elections in a democratic manner and ensure that the youth representative actually represents the youth of the municipality…

So that…

- We can then put forward our ideas to the municipal councils for how the elections can be organized and provide support to engage youth …

So that…

- The municipal administrations are in favor of our ideas and the youth representatives are elected in a democratic way and represent youth interests …

So that…

- We can have a party to celebrate our success!

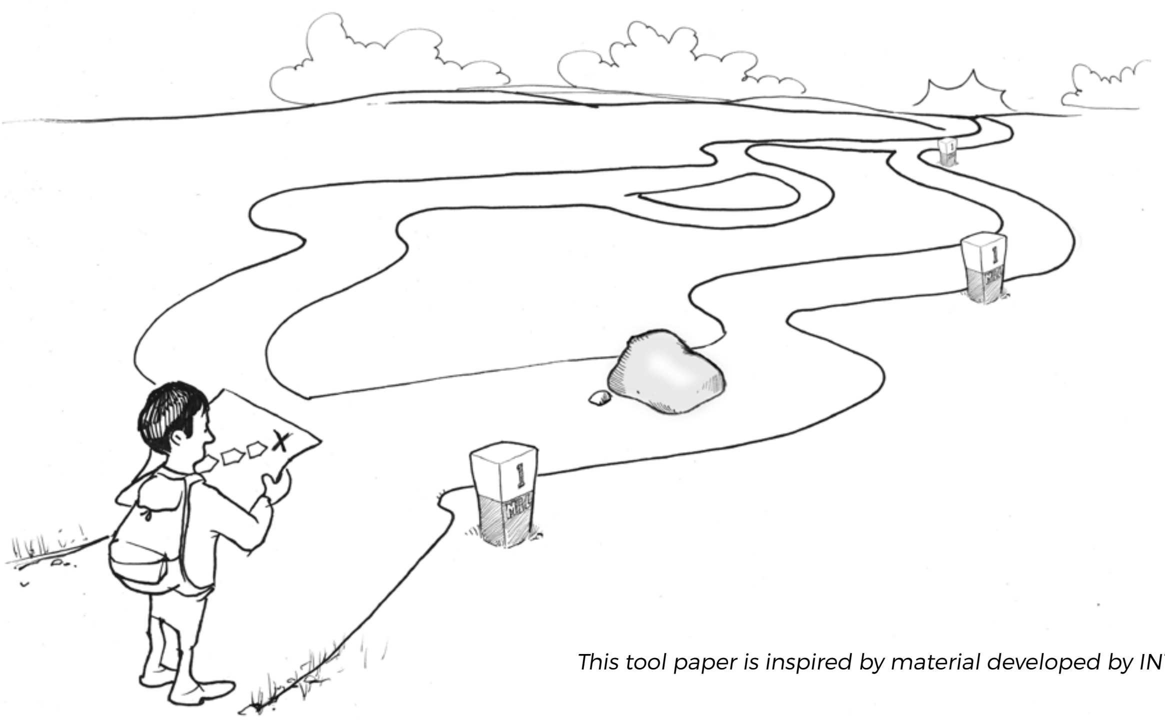
The above example includes a lot of assumptions for how change happens. What if the Provincial Governor is not in favor of your issue?

What if the decisions made around the organization of youth councils are not made at the Provincial level, but needs to be determined at the national level in the national youth policy? Are there openings at municipal level for organizing the youth councils differently and encouraging the youth in the councils to be more accountable to youth in general?

To test your roadmap and your theory of change, ask yourself what conditions need to be in place for each action to happen – and to what extent your assumptions are realistic? What do you have control over – and what is outside of your control?

There can be many paths to change. And there can be changes to the context, the power relationships and the situation you are trying to influence. You can use post it notes, so that you can move the activities and outcomes around.

Use the roadmap as a visual overview – as well as a dynamic process tool, you update and reflect upon along the way.



This tool paper is inspired by material developed by INTRAC

TOOL

KNOW, FEEL, DO

WHY

Effective advocacy is about **influencing people** with the power to make decisions and create change.

Know, Feel, Do (K-F-D) is a simple tool that helps you to **bring clarity to the change you want to achieve** with your communication and advocacy work – so that you may craft a clear strategy on how you intend to influence people.

K-F-D recognizes that people don't just want to be 'informed' ("What do you want them to know?"). They also need to know what action you want them to take as a result of that knowledge ("What do you want them to do"). At the same time, it is also important to understand what interests and motivates the people you want to influence, so that you can connect with them and make them care ("What do you want them to feel"?).

Putting yourself in someone else's shoes and thinking about how you want them to feel helps you to find out how to best deliver your message or how to involve people in a motivating way.

K-F-D reminds us that sometimes it is not about "educating", but about understanding and motivating the people we are communicating with.

WHEN

You can kick-start the **early stages of planning** your advocacy by using K-F-D. Also, K-F-D is a useful tool for **planning a meeting** with a decision-maker or **designing sharp messages** for particular audiences.

HOW

Think about the people you want to influence. Ask yourself the 3 simple questions:

- "What do you want them to know"
- "What do you want them to feel"?
- "What do you want them to do"

Keep it simple and focus on the essential. Ideally, you will only have a couple of clear sentences under each of the questions. Keep these questions in mind, when deciding on your advocacy strategy, designing your message and building your arguments.

WHAT MAKES A GOOD ADVOCACY?

A large part of the children in our municipality are not going to school due to parents concerns of the quality of school. Often teachers are absent and the children are then left on their own with no adults to teach them. The teachers complain that they have not been paid their salaries from the local government and therefore have to work other jobs. The delay in salaries is due to that the municipality education office has not received the funds set aside for education from the provincial government. The consequence of this is that the futures of a large number of children are compromised and that teachers and parents alike are frustrated.

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TOOL

DIALOGUE WITH DECISION MAKERS

WHY

If you want to influence a decision maker or someone else in power, the best way is often a face-to-face meeting.
Meetings may be part of our everyday lives in our associations and work – and often advocates don't invest sufficient time to prepare for a meeting to get the most out of the opportunity.

A successful meeting or dialogue with a decision maker can help you to; Gather information to develop your advocacy strategy Influence the person you are meeting

WHEN

A single meeting is often not enough for achieving your advocacy objective even if it is a meeting with a key decision maker. Normally, it takes a series of meetings to develop a relationship and understanding with the person or group which can help you achieve your goal.

HOW

Influencing depends on developing a relationship and building mutual understanding, trust and good communication. It is like strengthening a bridge over a river – the stronger the bridge, the more it can carry. The better mutual understanding you have in a relationship with someone, the more you can ask of them – their views, the problems they see or the reservations they have.

Sometimes when advocates are too focused on their cause and what they want to say themselves, they fail to establish a good relationship and understanding with the person, whom they are meeting.

Good tips for building a good relationship with someone

- Invest time in researching about the person you are meeting in advance so that you can think about how you can best put across your message.

- Be alert in the meeting and note where the person isinterested and engaged in what you are saying and where they appear disinterested and bored. You may find that some people are really interested in facts and statistics – while others light up when you tell stories and case examples. Some are interested in small talk at the start of the meeting and others want to get straight to the issue.

- It is often easier for people to connect if they have something in common. Listen carefully, ask open questions and find common ground. It can sometimes be easier for people who are of the same age, come from the same area or have studied at the same university to connect. The easier it is to connect and establish an understanding the more likely it is to be listened to.

- People often appreciate if you are able to comment on their recent activities (I saw your speech, I read your report) and remember what you discussed (work related or personal) during the previous meeting.

- Be clear to give the decision maker credit where it is due – acknowledge any efforts they have made to address the issue.

REMEMBER FIRST IMPRESSIONS COUNT

How you dress will have an effect. If you are meeting with a youth group it will probably help build understanding if you are casually dressed, while it might be offensive to show up to a meeting with a village leader in shorts and sandals. Your appearance should help you connect with people, not create a barrier.

Trust is a key ingredient
It is very important to build a trustful relationship if you are asking a person to make difficult choices or take a political risk for you. Trust takes time to establish and it can be lost easily. Do not betray a persons' confidence or share information that they have given you without permission.

Likewise it is important to live up to your own commitments. Also, if you are going to take any actions (e.g. publish a report, do a radio show, host a public meeting) it can be useful to let your decision maker know, so they don't feel surprised or ambushed.

Small things matter. Remember to reply to e-mails and phone calls in a timely way, don't be late for meetings – even little things can undermine or reinforce perceptions of your trustworthiness. You want to establish yourself as a trusted and professional source of knowledge and advice in relation to your issue.

Key questions to consider before approaching a decision maker:
Before asking for a meeting, think through the following questions

- **Why do you want to speak to the person?** It is a good idea to explain why your issue is linked to their power and responsibilities and what you want to talk to them about specifically. If the decision maker has made recent public statements on your issue or if they are participating in a policy process you can also refer to these to show you are knowledgeable.

- **When and where do you want to meet them?** At their office, at your office, with the local youth-group – there are pros and cons. Consider how you can best get to talk to them about your issue. You can also consider to invite them for an event – or if there are important or interesting people visiting your organization.

Dialogue with decision maker.

Use the tool: Know, Feel, Do to be clear aboutwhat you want to achieve from the meeting. Know, Feel, Do builds on the idea that you want to influence people to both be informed, feel a need to act and act for change.

Make sure you know as much as possible about the people who will be attending the meeting. What position do they hold, what power do they have, what are their interests and priorities and if possible any information about their personal style and approach. The more you know about them, the better you can tailor your message and establish understanding.

Sometimes it can be easier to get a meeting if more organizations with similar views get together, as it shows that many people are interested in the issue. Be aware that you may have less control of the meeting and the message if you share a meeting with others.

It is useful to analyze who is most likely to influence the decision maker you are meeting with (for instance through your stakeholder analysis). Maybe the decision maker cares more about the opinion of the local church leader than your organization. In your meeting you may want to refer to these people and their support for your issue (or even invite them along).

- **Why should they want to talk to you?** Explain why it is relevant for them to speak to you on this issue. Who is your organization, what is your knowledge, expertise and legitimacy to speak on this issue?

- **What do you want? What do you offer? What's in it for them?** Decision makers are often busy people. They don't want to just be briefed on issues – they want to know what you expect to get out of the meeting and why that outcome would benefit them (as well as your issue).
  Very few decision makers are going to take time out of a busy schedule to fit in a meeting when they don't know what the point is – or if they think the organization will just be complaining.

When you have a meeting scheduled, go through the meeting beforehand

- **Plan and rehearse your introductory statement.** You have the opportunity in the first few minutes that you get to speak to set the tone of the meeting and to set out what you would like to get out of the meeting.
  Its best to be clear about this from the start – otherwise you may end up spending a lot of time discussing what the decision makers wants you to know about the issue and not what you really want to know.

- **Know what you want out of the meeting** and think through questions you would like to ask – and questions that you may be asked.

- **Prepare a short written brief** to leave at the end of the meeting. There may be a note taker at the meeting – but by leaving a brief, you can ensure that your key messages are passed on.

During the meeting

- Be polite, respectful, professional, concise.
- Be propositional, not oppositional – as much as possible. Try to present your cause in a way that is solution oriented and interesting to the person you are meeting with.
- Listen, ask questions and try to build a relationship and mutual understanding.
- Summarize the meeting at the end – maybe leave a brief, so that they can remember you and your core message.

INFLUENCING POLITICAL DECISION MAKERS

When influencing politicians and political decision making processes, it is a good idea to:

- Get to know the political system and the decision making processes
- Get to know the key actors and build and maintain relationships
- Get to know the mandate of key decision makers, understand their agendas and interests
- Present your cause in a way that is interesting and solution oriented

This tool paper is inspired by material developed by INTRAC

ORGANIZATIONAL DEVELOPMENT

THE DANISH YOUTH COUNCIL

POSITION PAPER

ORGANIZATIONAL DEVELOPMENT

What is organizational development all about? How can we get an understanding of how an organization works? And what is our role? If you are asking yourself these questions, this paper is for you. It presents DUFs considerations on organizational development – as well as lessons learnt, ideas and tools for strengthening your work.

WHY WORK WITH ORGANIZATIONAL DEVELOPMENT?

Organizational development has been on the development cooperation agenda for a long time.

The idea is that you need to be a well-functioning organization with sufficient skills and resources in order to do good activities and be able to influence people with power to support your cause.

And you can almost always get better at what you do, be inspired from the experiences of others and develop your work in your organization.

DUF encourages you to work in partnership with other civil society organizations, because there is a lot to learn from working together.

When you engage with people from other parts of the world, you learn a lot from each other and get a better understanding of each other's lives, organizations and contexts.

If you are going to support an organization in changing in a meaningful and lasting way, you need to understand the organization. And perhaps the best way to support organizational change is to help an organization to understand itself better?

WHAT WOULD YOU LIKE TO LEARN FROM EACH OTHER?

When you enter a partnership between organizations, it is a good idea to look at what you would like to learn from each other. What skills and experienes does each organization have? How can you best exchange experiences or skills?

WHAT IS ORGANIZATIONAL DEVELOPMENT?

In DUF organizational development is defined as planned and deliberate processes that create lasting, positive change in the organization.

There are many ways of looking at organizations and many ways of working with organizational development.

The first step to support organizational change is to understand the organizations you work with.

If you ask people what they think about when you say the word 'organization', they will come up with a long list of words such as people getting together, meetings, vision and mission volunteers and staff, activities and so on.

The many answers reflect that organizations are complex, living systems. Organizations change over time and each organization is a unique combination of purpose and ambitions, the people that make up the organization, the way of working and past experience of failure and success.

Organizations develop their own culture, habits, language and stories – sometimes through a conscious effort and sometimes without being aware of it. And there are many forces that influence and shape the organization from outside.

There are many ways of looking at organizations to get a better understanding of what is going on – and in what way it would be helpful to develop the organization. We have chosen some models that we find helpful.

THE THREE CIRCLE MODEL

The three circle model is a model developed by INTRAC.

It describes an organization by three overlapping circles that represent the organizations identity, activities and relationships to the outside world. The three circles are surrounded by the context, that affect the organization and which the organization wants to influence and change.

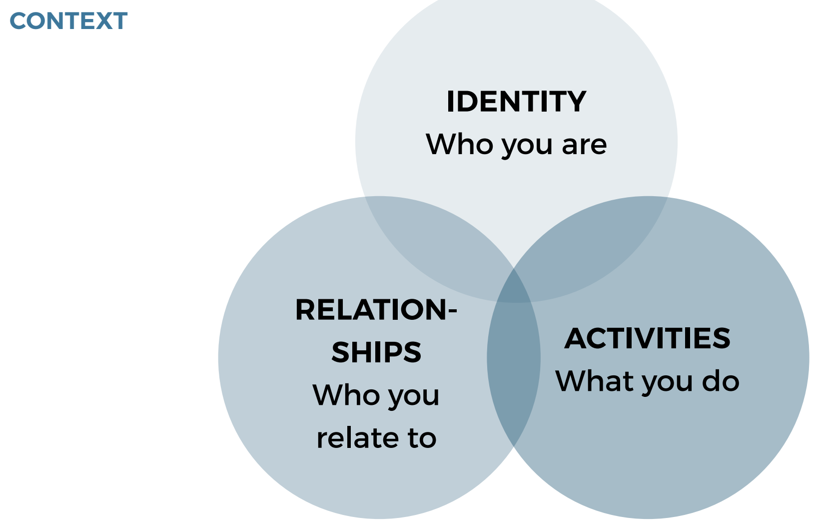
The model can help us to **see the relationship between different parts of an organization** – and gets us to **analyze what is working well and what could improve**.

Identity – what you are

This circle relates to the organization's purpose and vision, the formal policies and programs as well as the culture of values of the people in the organization.

It also has to do with structures and systems within the organization such as decision making structures and procedures for doing things. The human and financial resources within the organization are also part of this circle.

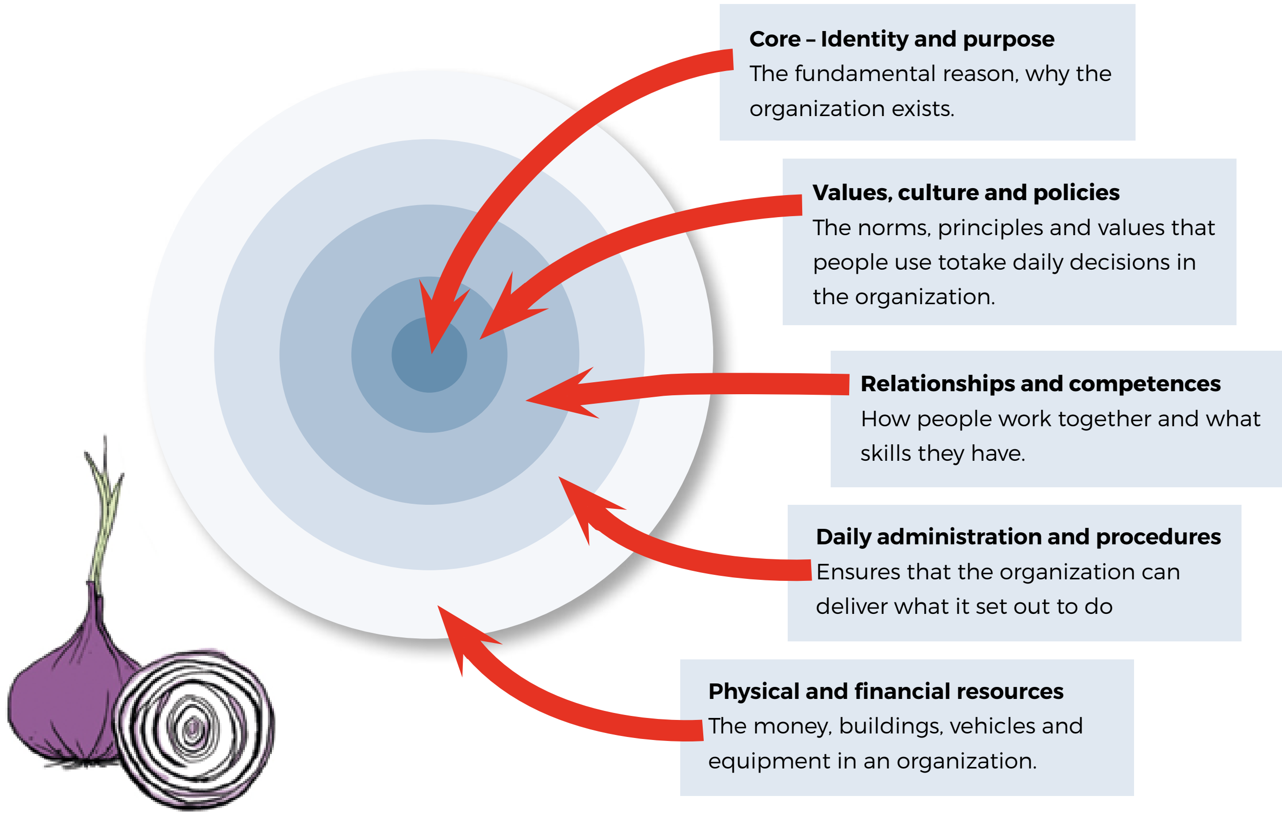
THE THREE CIRCLE MODEL



You are **your most important tool**. Organizational development doesn't start with the tools and methods, but the person who will use them. It is a good idea to think about why and how you use tools – and reflect on your own relationship to the organization you are working with.

Just like the **Change triangle**, the three circle model shows that there is a connection between the activities you do, your organizational identity and capacity and the relationships you have to outside actors. In a well-functioning organization, the three circles work together and reinforce each other.

THE ONION SKIN MODEL



Activities – what you do

The activities that you do – and their results are also important for understanding an organization. When you lookat the activities it is good to ask yourself: Are we making a difference? Are we doing the right things?

Relationships – who you relate to

This circle has to do with the relationships between your organization and other actors in society. It can be difficult to bring about change on your own, and it is a good idea to work with or influence other civil society organizations, the state or other actors.

Context

Change happens differently in each context. You have a better chance of making a difference, if you understand the context you work in and your own possibilities for contributing to change.

A context analysis can look at the political, economical, social and cultural factors that influence your organization – or which you want to influence.

THE ONION SKIN MODEL

You can also look more in detail at the internal organizational identity and capacity (the circle: Identity: What you are).

Organizations can be seen as having a number of layers. You can picture an onion which grows in layers of skin from the core outwards.

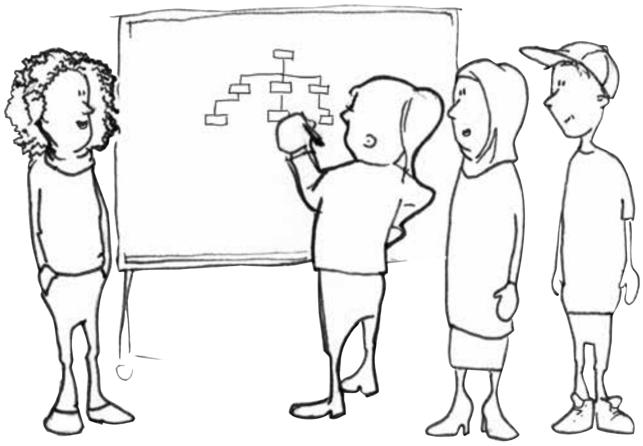
In organizational terms you can think of the core of the organization as the identity and purpose of the organization – the worldview and vision for change. The next layer is the values, culture and policies of the organization – the ideas of how the organization wants to bring about change. Following these come layers of relationships and competences in the organization, the administration and procedures as well as the physical and financial resources.

The onion skin model is good for showing that effective organizational change is based on coherence between the different layers. For instance, if you change your strategic focus and wants to work with a new

HOW DO YOU BUILD A GOOD RELATIONSHIP?

In our experience the following qualities and abilities are important when you want to establish a good relationship:

- **Know yourself**, be clear about who you represent and think about the power you have and how it affects your relationship. Also, it is key to be aware of how you are seen by others and what you represent to them
- Be able to **explain clearly** and **honestly** why you want to change something and how you intend to do it
- **Listen deeply, actively** and **with empathy** to what others say and do
- **Build trust** by being worthy of trust in all that you do
- **Make agreements that reflect the interest of everybody** and encourage that all take responsibility of the work



theme in the organization, you may have to train staff or volunteers to improve their skills on that theme and be able to deliver.

The model also illustrates that an organization can struggle with problems that are deep rooted, even though the outside layers look fine. For instance if an organization has an unclear purpose and lacks direction in its work, it can have many different projects but may find it difficult to deliver results that create significant, lasting changes.

The model can help us to **see the relationship between different layers of an organization** – and start a conversation about **how to make sure that changes in one layer of the organization connect to the rest**.

The onion skin model is developed by INTRAC.

HOW TO SUPPORT ORGANIZATIONAL DEVELOPMENT?

Relationship is at the heart of bringing about change. If you are to support organizational change, it is important to build and sustain a good relationship with the people you are going to work with. This takes time and effort.

WHAT IS YOUR ROLE?

If you are to support organizational change, it is important to be clear about your own role, position and mandate – as well as the level of experience you are bringing into play. It is a good idea to draw an **organogram** or a **rich picture** and analyze how your role, position, mandate and experience fits with the organizational development process you are proposing.

For instance, if you are a Danish project group consisting of volunteers, who have experience at the local level and you are working together with the board of a professional NGO abroad on revising the organizational strategies, it may be a good idea to involve people from your own board to throw in some experiences from their last strategy process?

It can also be that you are two youth volunteer groups who are working to make sure that youth have a say in your organizations, but you need to get your board to agree with the ideas. In this example, you'll need to consider what your mandate is, how you can convince your board and management to support your ideas and who to involve.

When you start building relationships, you start to understand what is happening and how the organization works.

And when you build trust, it is much easier to have an open, honest conversation about what works and what doesn't and work together to develop the organization in a meaningful way.

- How are you going to build relationships with the people you work with so you trust and understand each other?

It is also a good idea to consider whether your role will be.

- Are you going to be a trainer with lots of knowledge on an issue, a facilitator of a process or maybe a critical friend with an outsider perspective and lots of questions?

If you are to support an organization in bringing about change, it is important that you don't do all the work to develop the organization as one person or a small group only.

TOOL

It can be difficult and sensitive to change the ways you do things – and if you are trying to get others to change, **you can be met with both enthusiasm and resistance**. It is a good idea to think through the power relationships and interests in an organization – and to think about how you can get everybody to be open to new ideas.

It is important to not only focus on the result you want to achieve, but also on the way to reach the result. The working process will determine if you end up with an organization that feels helpless and dependent on you – or if the organization feels more confident and have improved ability to do its work.

If you want people to take responsibility for the work, it is a good idea to make sure people are involved at an early stage and have a say throughout the process – and that you all review what you have learnt at the end.

This paper presents DUFs considerations on organizational development – as well as ideas and tools for facilitating organizational change.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organizations and the context you are working in.

That is why the paper doesn't give prescriptions or specific answers to how you should work. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new ideas or tools can be added any time.

If you want more people to own the changes, it is important that they are involved, have a say and also take responsibility of the work. Otherwise, you might end up with a very nice communication policy or a shiny new democratic constitution for the organization that no one will use.

- How are you going to involve people in the process?

- How are you going to motivate them to take responsibility for the changes?

It takes time to support change to happen – and it takes time to ground change, so that it stabilizes. New ways of working together may need time and effort to take root, and people may need mentoring to use their new skills.

- How are you going to support people in turning the good intentions into actions and achievements?

- Does the change live on?

It is a good idea to review the process once in a while and see how things are going and if you are moving in the right direction. That way people learn from the process and reflect on how the organization is developing.

- Are you empowering people to do their own reflection and learning processes?

FURTHER INSPIRATION

Tools recommended by DUF

DUF has collected a set of tools for **understanding organizations** that can help you to get a good conversation with your partners on your respective organizations.

There are a wide range of other tools and guides to support you in facilitating organizational change, we recommend to take a look at those:

- **Organizations and Development** by James Taylor.
- **The Barefoot guide to Working with Organizations and Social Change** – and **Learning Practices in organizations and social change**.
- **Guide to Organizational Development in Civil Society Organizations** by CISU and DH.

Meet up with DUFs consultants

DUF can provide inspiration on how to analyze organizational setups and needs and give advice on how to facilitate organizational development.

THE DANISH YOUTH COUNCIL

TOOL

UNDERSTANDING ORGANIZATIONS

WHY

There are many ways of looking at organizations and many ways of working with organizational development. The first step to support organizational change is to **understand the organizations** you work with. And perhaps the best way to support organizational change is to help an organization to **understand itself better**?

WHEN

It can be helpful to take a look at each other's organizations when you meet up for the first time when you meet up for the first time on a **partner identification trip**.

Also, it is a good idea to **design projects** based on a good understanding of each other's organizations and make sure the three sides of the change triangle to work together in your project.

And it is essential to start any **organizational development process** by taking a good, deep look at the organization in question and develop your understanding of it as you go along.

HOW

Below are described two ways to start a dialogue to understand organizations better. The exercises can be made each on their own or following each other.

Just like the Change triangle, the three circle model shows that there is a connection between the activities you do, your organizational identity and capacity and the relationships you have to outside actors. In a well-functioning organization, the three circles work together and reinforce each other.

There are many other ways at looking at organizations. These are just examples that you can use as an inspiration to do your own analysis and come up with ideas for organizational development.

THE THREE CIRCLE MODEL

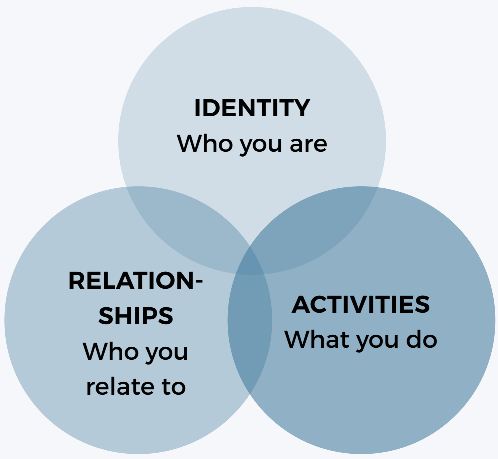
The three circle model describes an organization by three overlapping circles that represent the organizations identity, activities and relationships to the outside world.

The three circles are surrounded by the context, that affect the organization and which the organization wants to influence and change.

The model can help us to see the relationship between different parts of an organization – and gets us to analyze what is working well and what could improve.

One way of working with the model is to draw three circles; What you are, what you do and who you work with.

THE THREE CIRCLE MODEL



Ask yourselves the following questions for each circle and note down responses on post its. Place the post its and move them around to where it makes sense in the circles.

Use the three circle model as a starting point for a dialogue about the organization.

Identity – what you are
This circle relates to the organization's purpose and vision, the formal policies and programs as well as the culture of values of the people in the organization. It also has to do with structures and systems within the organization such as decision making structures and procedures for doing things. The human and financial resources within the organization are also part of this circle. Ask yourselves:

- Why does our organization exist? What is our purpose?
- What are the different departments and programs in our organization?
- What are the values and culture of people in our organization?
- What are the human resources? How do we understand and value volunteers? How is the balance and the relationship between men and women in our organization?
- What financial resources do we have?
- How does this circle link with the two other circles? Do they overlap and support each other?

Activities – what you do
The activities that you do – and their results are also important for understanding an organization. Ask yourselves:

- What activities are we doing? With whom?
- How are volunteers part of our activities?
- Are we making a difference? Are we doing the right things?
- How does this circle link with the two other circles? Do they overlap and support each other?

Relationships – who you work with and who you try to influence
This circle has to do with the relationships between your organization and other actors in society. It can be difficult to bring about change on your own, and it is a good idea to work with or influence other civil society organizations, the state or other actors.

Ask yourselves:
- Who do we work together with? How?
- What actors influence us? How?
- Who would we like to influence? How?
- How does this circle link with the two other circles? Do they overlap and support each other?

Context
The three circles are surrounded by the context, that affect the organization and which the organization wants to influence and change.

Ask yourselves:
- How is our organization afffected by the context?
- To what extent is our organization able to bring about the change we would like to see?

ORGANOGRAM

The organogram or organization chart is a classic way to get an overview of the different parts of an organization and the relationships between them. If you do it together in the partnership, it is a good way to understand the organizational structures and start a conversation of how each organization works.

An organogram shows the relationships from the board to the daily management, from directors to various departments, between staff and volunteers, and between volunteers. Depending on the organization, the structure can be hierarchical, flat or something else.

Start out by mapping out the structure on a big flipchart paper. As you go along, talk about:

- What is the role of each part of the organization?
- What is the relationship between different parts?
- Who has authority in the organization? How are decisions made and communicated?
- Where is your project group located – and how are you related to the other parts of the organization?

TOOL

THE ONION SKIN MODEL

WHY

There are many ways of looking at organizations and many ways of working with organizational development. The first step to support organizational change is to **understand the organizations** you work with. And perhaps the best way to support organizational change is to help an organization to **understand itself better**?

The onion skin model is good for showing that effective organizational change is based on coherence between the different layers. The model also illustrates that an organization can struggle with problems that are deep rooted, even though the outside layers look fine.

It is helpful to use the onion skin model in relation with the **Three Circles model**. You can use the onion skin model to look more in detail at the internal organizational identity and capacity (the circle: Identity: What you are).

The onion skin model can then help you to **see the relationship between different layers of an organization** – and start a conversation about **how to make sure that changes in one layer of the organization connect to the rest.**

WHEN

It can be helpful to take a deep look at each other's organizations when you **design projects** together, so you make sure you have the capacity to do the project.

And it is essential to start any **organizational development process** by taking a good, deep look at the organization in question and develop your understanding of it as you go along.

HOW

The Onion Skin model is developed by INTRAC. It shows organizations as having a number of layers. You can picture an onion which grows in layers of skin from the core outwards.

In organizational terms you can think of the core of the organization as the **identity and purpose** of the organization – the worldview and vision for change.

The next layer is the **values, culture and policies** of the organization – the ideas of how the organization wants to bring about change.

Following these come layers of **relationships and competences in the organization**, the **administration and procedures** as well as **the physical and financial resources**.

You can work through the different layers and assess how well you are doing in each layer. Based on your assessment you can decide if there are any issues you want to take action on.

Look at how issues are related and find out what the root cause of any problems are. If you decide you want to change something, make sure you consider how to make sure that changes in one layer of the organization connect to the rest.

The identity and purpose of the organization can be described as the fundamental reason, why the organization exists. This can be very clear from the beginning, but as the organization grows it can become more difficult to get a shared vision. It can also be that the political, social and cultural context in which the organization is working is changing – and this may mean changed expectations, trends or demands on the organization.

- Why does the organization exist? Do you have a clear purpose and vision for your work? Do you have a shared understanding in the whole organization?
- How is your organization affected by changes in the context, expectations from the target group or new trends in the area you work in? Do you have a strategy for dealing with these changes?

If the identity and the purpose of the organization is challenged it may be a good idea to take a look at the organizational vision, do an analysis of how to deal with challenges and create strategies to guide the work.

Values, culture and policies of the organization include the norms, principles and values that people use to take daily decisions in the organization. Some of these values are conscious and others are just 'the way things are'.

- What values guide the organization?
- What is the working culture in the organization?
- Do the values and the culture support you in achieving your purpose? Are you satisfied with how things are?

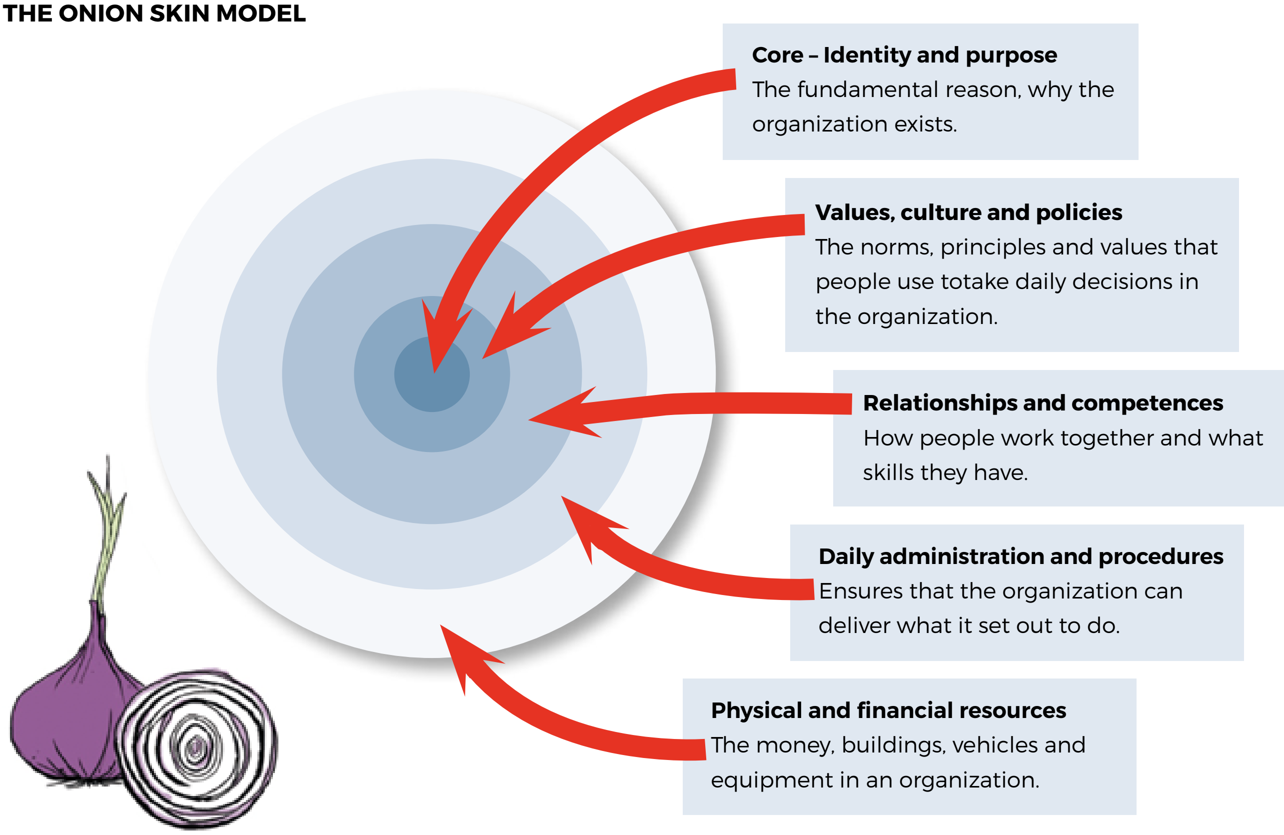
At this level, you can work to *clarify values and principles in the organization, develop policies e.g. a volunteer policy or create a democratic constitution.*

Relationships and competences is all about how people work together and what skills they have. It is also a good idea to look at the roles and relationships between people.

- Do people have the right skills in the organization to achieve what you set out to do? Are there skills you'd like to develop or get from outside?
- To what extent do people feel supported? How is the environment for learning in the organization?
- How are the relations between people? Do they get along with each other? Is there something you can do to solve disagreements or help people to work better together?

Depending on the needs, you can work with *team building, conflict resolution, improving meetings, ensuring that learning and reflection is part of the work routines, improving ways of working together, support to solve tasks, education programs or exchange of experience for management and volunteers to strengthen their skills.*

THE ONION SKIN MODEL



Daily administration and procedures in the organization.
The daily administration gives form to an organization and ensures that the organization can deliver what it set out to do.

- How are the working procedures in the organization?
  Are they efficient and support you in achieving the purpose of the organization?
- How are the financial management procedures?
  Are they efficient and live up to the standards you want?
- How do you monitor and evaluate progress in your projects? How do you support organizational learning?

At this level it can be a good idea to work to *establish better working procedures e.g. effective communication procedures, structures for financial management or a system for monitoring, evaluation and learning.*

Physical and financial resources has to do with the money, buildings, vehicles and equipment in an organization. This is often the most visible image of the organization.

- What is your organization able to do with the financial and physical means that are available? Is there a need to attract further resources?

DUF supports "people rather than bricks" – and has its focus on the other layers of the organization.

THE DANISH YOUTH COUNCIL

TOOL

RICH PICTURE

WHY

A Rich Picture drawing can help you to capture and analyze complex organizational relationships. An image can provide a lot of information and food for thought in a nuanced and holistic way.

WHEN

You can draw a rich picture of an organization or analyze an interesting aspect of the organization.

For example, you can draw the metaphors and images that come to mind, when you think about your organization and its structure. Or if you want to go in depth with a specific theme such as volunteer culture, you can draw an image that shows the position of the volunteers in the organization or depicts the typical volunteer.

HOW

Draw a Rich Picture with a focus on exploring an issue in relation to your organization. If you are working with more groups of people from the organization it is important to get multiple perspectives in play.

Rich pictures can be drawn in many different ways; here are some guidelines:

- You don't have to be an artist to produce a rich picture.
  All you need is a very large piece of paper (flipchart-sized or bigger), lots of coloured pens and some time to think
- The focus of the picture should be the issue you want to explore in your organization
- Use all the space available – spread out the parts of your picture but leave some space for adding new insights to the picture along the way
- Include yourself in the picture – you don't have to be at the centre but you should be in there somewhere!
- Include key people, teams and structures within and outside the organisation.
- Represent the issues, problems and concerns of the people in the diagram using drawings, speech bubbles and thought bubbles (just like comic books).
- Use metaphors – for example, if you think someone is forcing their views on others, draw them on an elephant!
- Represent types of relationships using arrows, lines or any other way you can think of.
- Represent the climate or quality of the relationships using symbols such as dark clouds, sunshine, lightning flashes or any other way you like.
- Make it colourful and let your creativity flow.

Talk about your issue as you go along – and when you finish the drawing.

- What new understandings of your organization and your issue did you get from the drawing?
- How can you use the new learnings and new ideas in your work?

PARTNERSHIPS

THE DANISH YOUTH COUNCIL

POSITION PAPER

PARTNERSHIPS

**What is partnership all about? How to start a new partnership? How to work together for many years and develop your partnership? How to end a partnership in a good way?
If you are asking yourself these questions, this paper is for you. It presents DUFs considerations on working in partnership – as well as lessons learnt, ideas and tools for strengthening your partnerships.**

WHY WORK IN PARTNERSHIPS ?

DUF projects must be implemented in partnership between DUF's member organizations and one or more partner organizations. Put simply, to work in partnership to work together.

The idea is that when young people engage with other young people, they learn a lot from each other and they get a better understanding of each other's lives, organizations and contexts. That understanding is valuable in itself – and it is a good basis for doing projects that make a difference.

DUF wants to promote partnerships that:

- Create **long-term work relations** rather than short-term project activities.
- Are based on **joint ownership** and **equality** among partners
- Are based on **clarification of expectations**, **roles** and **responsibilities**
- Are based on a shared understanding of the aims of the partnership and the projects

HOW TO ESTABLISH A GOOD PARTNERSHIP FROM SCRATCH?

Establishing a good partnership

Some organizations meet up by chance and find out that they have something in common. Other organizations go in search for potential partner organizations that work with a specific issue or are active in a specific country.

When you establish a new partnership, it is important to consider, who will be the right partner for you and how you can make the partnership strong and viable.

EQUALITY – A FUNDAMENTAL PRINCIPLE

Equality is a fundamental principle of good partnerships. It entails:

- That you as organizations respect each other's views.
- That both parties contribute something to the project and the partnership.
- That both parties make an effort to learn from the partnership and evolve accordingly.
- Both parties have an influence on and responsibility for the common projects.

A PARTNERSHIP THAT FITS

For you to get the best possible partnership and results, it is important that you talk openly and are conscious about the needs and wishes each of you have.

- What do you want to get out of the project, and what can you learn from it?
- What can you contribute with?
- How do you meet each other's expectations and needs?

HOW DO YOU FIND OUT WHAT YOUR PARTNER WANTS OUT OF THE PARTNERSHIP?

DUF recommends you to clarify your expectations to each other, decide on your respective roles and define clearly who is responsible for what – at an early stage in the partnership. A partnership agreement can help you to clarify expectations to each other.

KNOW YOUR PARTNER

When you want to find the right partner it is a good idea to find out if you match when it comes to organizational values and ways of working:

- What are the values that each organization is based upon?
- How is each organization led? Do you have active local volunteers? What do they do and do they have an influence on the activities and the organization?
- How is each organization funded? Do you have other partnerships and donors?
- What activities does each organization do? How are they organized?

THE FIRST MEETING

The first meeting between potential partners is always exciting. There are lots of hopes, expectations and ideas for a cooperation – and you want to get a good start together.

It is a good idea to prepare for the first meeting together with the potential partner: What is important for you to talk about at the meeting and what are you curious to hear more about from the potential partner?

One way of doing it could be to agree on an agenda beforehand:

- What is the purpose and agenda of the meeting?
- Who are you? Introduction to each organizations purpose, structure and activities. What are you curious to hear more about?
- Intro to the DUF framework?
- What are your ideas for working together?
- Are you a good match? Any agreements forward?

... And remember, the most important thing in the first meeting is to keep an open mind, be curious and listen to each other.

A good match is based on careful considerations and honest conversations about what you as organizations are passionate about and what kind of change, you want to create for children and young people.

If the partnership is to be meaningful, your organizations should have something that you want to work together on. Often the cooperation runs more smoothly if you have similar organizational values and ways of working – but it can also be that you want to learn something from an organization that works in a different way than you do.

And in almost all partnerships the personal chemistry matters – do you like working together?

EXPERIENCE FROM PRACTICE

The Social Liberal Youth and the Youth Agenda Trust have started cooperation on dialogue activities in Zimbabwe. To get a good understanding of each organization's way of working with dialogue, they conducted dialogue activities together during their preparatory study. After the activities, they gave each other feedback and talked about how they understood the concept of dialogue and their way of working. This open dialogue very early in the partnership paved the way for a trusting relationship in which both partners are communicating in an open and honest way with each other.

WHAT IS IMPORTANT IN A PARTNERSHIP?

During monitoring and learning visits, DUF asks partnerships what they find important in a partnership. These themes are often mentioned:

- Context knowledge. It is important that the organizations in the partnership gain an understanding of the context in which each organization work.
- Open, honest communication is key to build trust and ensure a good cooperation. Don't hide problems, but deal with them in a constructive way. Respect each other and listen to each other.

HOW DO YOU KNOW IF YOU ARE DEVELOPING YOUR PARTNERSHIP?

The WWF partnership toolbox has a lot of questions and tools to help you to work together. It also has tools for how to see if you are making progress in your partnership and suggestions for how to develop your partnership over time.

DUF recommends that you make a partnership agreement, where your shared expectations are written down alongside other important themes, such as your shared vision and division of responsibility. It is a requirement that the partners enter into a partnership agreement for all Partnership Projects.

HOW TO MAINTAIN GOOD RELATIONSHIPS IN ANEXISTING PARTNERSHIP?

It is a good idea to meet up regularly to build a good relationship and to take time for reflection and learning from the experiences in the partnership.

You can apply for a Partnership Development project during or between projects and meet up in Denmark or in the partner country. Often partnerships talk about challenges they are facing, new visions for the work together or revisit their partnership agreements.

It is also a good idea to participate in the **international DUF events**, such as project management seminars or conferences. That way you get a chance to meet, work on ideas together and share experiences with other partnerships.

HOW TO END A PARTNERSHIP IN A GOOD WAY?

All partnerships come to an end at some point. Sometimes it is a joint decision to end a partnership – and sometimes the partners don't agree how and when the cooperation should end.
When you have established a good trusting relationship, it can be a good idea to ask yourselves how you want the partnership to develop in the long term.

- **What happens when you complete the task you set out to do together?** Talk with partners and stakeholders about how the cooperation is going. After each project, it is a good idea to check in with each other and see if your ideas for working together still match.

- **How will you know when we have come to the end of the partnership?** How can you end the partnership in a good way? If you are thinking about ending the partnership for whatever reason, it is a good idea to talk about how you can phase out the cooperation in a good way well before you intend to end the partnership.

- **How can you ensure that the changes you have achieved live on?** Think about sustainability in all your projects. How will your work and the changes you have achieved live on?

PARTNERSHIP CAN BE DIFFICULT

When you work closely with another organization you may run into challenges and frustration along the way. Maybe you disagree on the purpose of your project and the working methods – or you may find that personalities clash.

DUF supported partnerships often say that it is important to talk regularly and to meet up face to face when possible.
The more you get to know each other, build understanding and mutual trust, the better you are at solving disagreements before they become irreconcilable conflicts.

It is a good idea to talk about how you intend to deal with disagreements and conflicts. That way both organizations can explain how they prefer to deal with critique and disagreements. It is a good idea to include your considerations in your partnership agreement, so that you can refer back to it if a disagreement arises.

DIVISION OF RESPONSIBILITIES

When a project is approved for DUF funding, the money will be allocated to the Danish organization. The Danish organization is financially and legally responsible to DUF. However, the Danish organization and the partner share the responsibility for implementing and managing the project.

FURTHER INSPIRATION...

DUF has created a tool for partnership agreements that can help you to get through essential themes.

There are also range of other tools to support you in establishing and developing a partnership. The **WWF Partnership toolbox** provides simple and efficient tools – and is available at the DUF website.

Meet up with DUFs consultants

DUF can provide inspiration on how to find partners, establish partnerships and give advice on how to develop your partnership.

This paper presents DUFs considerations on partnership - as well as ideas and tools for working with your partnership.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organizations and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to how you should work with your partnership. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

EXPERIENCE FROM PRACTICE

Ungdomsringen, The Danish Organization of Youth Clubs (UNGR) and Straight Talk Foundation (STF) have worked together since 2009. DUF met with representatives from the two organizations for a conversation onworking in a partnership, during a partnership development meeting in Denmark in the fall of 2014.

DUF: If you were to describe working in a partnership to new project groups in DUF, how would you explain it?

- **Saul (STF, staff):** To me it means to enter into a marriage, because it is more of everyday talking together, everyday working together.
- **Hassan (STF, staff):** I have three words to explain what it is like working in a partnership. 1: Think together, 2: Talk with each other and 3. Work with each other.
- **Annet (STF, volunteer):** To me it is about motivating other people, encouraging each other, being there for each other. These are some of the things that keep the partnership moving.
- **Allan (UNGR, staff):** I agree. If I should give an advice to new groups it is the word equality. That means, that it is not here in Denmark that we should produce the ideas, it is not us who should come with the ideas and tell our partner what to do. But as Hassan said, we think together, we work together, equally.
- **Benedicte (UNGR, volunteer):** Effective communication, equality, openness and open mindedness, transparence and honesty. You need to know when you go into a partnership that you come from different cultures and you need to be honest about how you work.
- **Allan (UNGR):** And just because we know each other well, just because we are "married", it doesn't mean everything is running smoothly. There can be some points where we disagree, but we can still talk in a fair way. And if the partnership is running well there is also space to discuss and give constructive criticism to each other.

DUF: The match of organizations in a partnership is essential for a good working relationship. What is a good match? What is important to look for?

- **Benedicte (UNGR):** We could see that in Straight Talk Foundation, there were youth clubs that were similar to ours and part of our goal is cultural exchange. We could instantly see that we had something in common and we could work well together.
- **Hassan (STF):** For me a good match is not only in the names, in the thematic areas. It is also in the human beings, it matters which people you are going to be working with.
- **Allan (UNGR):** The organizations should have more or less the same capacity. Straight Talk Foundation and UNGR are both professional organizations and match each other.
- **Benedicte (UNGR):** And I think it is okay that if you go on a partner identification visit and find out that you don't match, you don't have to carry through with the partner you planned, it is better to find the right one.

DUF: What are the things you learn from each, the differences between you and the things you gain from working together with each other?

- **Hassan (STF):** I think that the youngsters from The Danish Organization of Youth Clubs are learning that in Africa people can be very bright, very intelligent and open minded. We have to deal with the historical background and the relationship between Europe and Africa. So when the youngsters interact and speak with each other, so much of that background gets broken down. So we see that the youth begin to appreciate each other as human beings and the similarities we have – and that fosters cooperation much more closely.
- **Allan (UNGR):** One thing we learnt is the way they do peer-to-peer sex education, how openly they talk about it in the Straight Talk youth clubs. We have a similar peer-to-peer sex education concept at the national level of The Danish Organization of Youth Clubs, called 'the Sexualists'. Inspired from the education methods we saw in the Straight Talk clubs, we formed a local sex talk club. We couldn't copy the

EXPERIENCE FROM PRACTICE

concept directly, but we modified it to fit within our own context and linked up with the Sexualists at national level. And when we started this partnership project, Kirsten from The Danish Organization of Youth Clubs was telling about the structure of The Danish Organization of Youth Clubs and Hassan took the idea about a regional structure home to Uganda. Not copying, but adapting the idea.

DUF: What has been challenging in the partnership? What have you gained from the challenges and how do you overcome them?

- Hassan (STF): There must be a level of consistency in the people who are part of the project. Some of the youth we have to work with are completely new, so there must be a level of consistency to maintain continuity throughout the pilot and partnership projects.
- Allan (UNGR): Projects and partnerships are carried by human beings and not by papers. I agree with Hassan that all these changes of people are challenging. Otherwise you start from scratch all the time and there is no continuity.

DUF: What makes the friendly relationship possible?

- **Benedicte (UNGR):** It is that you go there, and you talk together, you don't only sit around a table but you do other things as well. You really talk in depth and learn about each other's families. If you understand the persons behind the decisions, you tend to understand the decisions.
- **Allan (UNGR):** And I want to add that the friendship we have, it is also coming from the partnership agreement. So my advice to new groups is to make a partnership agreement and use it. When we started this partnership we talked about how will we talk together for example through constructive criticism. If you write down your agreements, you can refer back to them later.

DUF: Do you have any good advice for new DUF supported partnerships?

- **Allan (UNGR):** Bring the challenges on the table, don't try to hide them. Then we can talk to each other. Be honest to each other.
- **Benedicte (UNGR):** Effective communication, equality, openness, transparency and honesty. And friendship. I think friendship is crucial in a partnership.
- **Hassan (STF):** When we have partnerships it means we are together. Equality is what drives partnerships. If you think that you are superior, just because you have the money and the money is going to another organization – that partnership is going to fail.
- **Saul (STF):** For any new partnership, they need to think about their vision and mission. The two partners have each their vision, and sticking to your core values is important when you develop projects. Don't change to suit the partnership or to suit the other because you think that will make the other partner happy.

TOOL

PARTNERSHIP AGREEMENT

WHY

Partnerships are less likely to run into irreconcilable disagreements if the partners have had in-depth and honest talks on how they want to cooperate – and have put their agreements in writing.

A partnership agreement helps you to clarify expectations to each other. The partnership agreement can be used as an agenda for dialogue on how you want to work together and to what you want out of the partnership.

WHEN

It is a good idea to consider what you want to include in a partnership agreement and what is important for you in a partnership as preparation for entering into a new partnership.

Do a partnership agreement, when starting your partnership – and use it as dynamic tool for clarifying expectations during your partnership. It is a good idea to revisit it and reconsider it as your partnership develops over time.

HOW

This tool provides a description of themes that may be useful for you to discuss and include as possible headings in a partnership agreement. Although not all themes may be relevant to every partnership, you can use the tool as checklist to make it easier to take up potentially sensitive issues in your cooperation.

When discussing and writing a partnership agreement it is important to **get the right people** together. Make sure that key people who will be involved in the partnership are part of this dialogue – and that the agreements you make are approved by the leadership of your organizations.

DUF recommends you use the tool as **a starting point for discussion** – either internally in your organization or with the partner organization:

- Clarify the partnership under discussion
- Clarify the purpose of the exercise
- Use the partnership agreement tool as a checklist for discussion – before writing an agreement.

If you want the written agreement to have legal status, it is important to take relevant legal instruction before making a final agreement.

POSSIBLE THEMES FOR A PARTNERSHIP AGREEMENT

Statement of intent
What is the vision for the cooperation? What do you hope to achieve?

Parties involved
Who are the organizations involved in the partnership?
Who are the persons responsible for the management of the partnership and the project?

Objectives of the partnership?
What do you want to achieve by working in partnership?
In what way does the partnership contribute to the vision and work of your organizations?

Values and principles
What values and principles are important to you when working in partnership?

Mutual trust and respect
What does mutual trust and respect mean to you? What do you understand as a lack of trust and respect? What will you do to share concerns and solve problems in the partnership? What will happen if there is a breakdown of trust and respect?

Description of partnership
What will your relationship be? How will you cooperate?

Timescale
Over what period will the partnership agreement run? Is there a possibility for renewal? Is there a maximum period?

Rights and obligations of each partner
What are the obligations of each partner? E.g. in relation to grants management and the conditions attached to grants. What rights does each partner have?

Roles and responsibilities
What roles and responsibilities does each partner have in the partnership?

Sharing of information and confidentiality
What information shall be shared between partners? What information do you want to keep confidential? When and how is information shared? What are the consequences of not sharing the agreed information? What information may be used externally by each partner?

Decision making
How and by whom will decisions be made within each organization? How will you make sure that the decision making is transparent?

Authority and signing procedure
Who has the authority to approve actions in each organization?

Financial management
If you transact money, what are the terms, conditions, accounting standards that you commit to?

POSSIBLE THEMES FOR A PARTNERSHIP AGREEMENT

Monitoring, Evaluation and Learning
What frameworks will be used for monitoring and evaluating progress in your projects? By whom?
How will you do reporting? What will you do to ensure that both partners are part of the reporting?
How will you make sure that lessons learnt are shared and used in the partnership?

Opportunities to develop the partnership
How will the development of the partnership be monitored and evaluated? By whom?
How will you make decisions about developing the partnership?

Dispute and conflict resolution
What behaviour will bring the agreement into dispute? How will you sole conflicts? What role will third parties play – if any?

Definition of terms
A clarification and agreement of the terms can be an important part of the negotiation process and may help you to avoid future disagreements.

MONITORI NG, EVALUATION AND LEARNING

THE DANISH YOUTH COUNCIL

POSITION PAPER

MONITORING, EVALUATION AND LEARNING

What is monitoring and evaluation all about? How do you encourage learning in your partnership and project? How to use the learning in future projects? If you are asking yourself these questions, this paper is for you. It presents DUFs considerations on working with monitoring, evaluation and learning – as well as lessons learnt, ideas and tools for doing simple, effective and meaningful M&E.

WHY WORK WITH MONITORING, EVALUATION AND LEARNING?

Monitoring and evaluation is a way of finding out if and to what extent you are creating the changes, you would like to see. Monitoring and evaluation is often abbreviated M&E.

M&E helps you to:

- **Document what you achieve** in the project and **share the knowledge**. A systematic documentation of changes helps you to be accountable to DUF and share lessons learnt with DUF and other DUF supported partnerships.
  You can also use your knowledge of the target group's needs and conditions or your methods' impact, when you do advocacy.
- **Check if you are on course** and **adjust** if necessary. All projects experience challenges and unforeseen events – and you will often need to adapt your project lan to new conditions.
- **Learn** from the experiences you make during the project with specific target groups, activities or methods. That way you can improve, when you do similar activities in the future and you can handover lessons learnt to new volunteers.

ASK YOURSELVES...

How do you find out if you are on course?
How do you adjust your project along the way?
How do you know if you are making a difference?

STORIES OF M&E

We all do monitoring and evaluation on a day-to-day basis in various ways and with differing degrees of thoroughness.

Through planning, monitoring and adjusting you are able to keep track of what you do and make the necessary adjustments – a bit like steering a car with one hand on the steering wheel, one eye on the map and one eye on the horizon.

If we are throwing a big party, we start by planning it. What would make it a good party, who will participate, what will happen at the party? At the party, we check to see if everybody is happy, if there is enough food, if the DJ is playing the right music to get the dance floor moving. Do people go home early, do they leave for other parties, does the party continue until next morning? After the party we listen to peoples stories about the party and we evaluate if the party was good or if we need to make adjustments for the next party.

- **Motivate, create ownership, and commitment** among the participants in the project. When you celebrate results and discuss lessons learnt with the participants of the project you motivate them and they gain

> The tool: Team Self Review explains how you can use the three universal evaluation questions to reflect on your project in your team – during the project and at the end of the project.

WHAT IS MONITORING AND EVALUATION?
Monitoring is the ongoing observation and recording of the project's progress: Are the activities running as planned and with the expected results?

Ongoing monitoring of project activities is your best tool to verify that the project is on course – and to adjust activities or the budget if it becomes necessary.

Evaluation is the systematic examination of the project's results, impact, relevance and efficiency at key stages during the project: Have you achieved the objectives of your project activities - and have you done the right things to achieve your objectives?

A well-designed evaluation can provide important learning and knowledge, which you can use to strengthen your current or future projects.

HOW DO WORK WITH MONITORING, EVALUATION AND LEARNING?
Monitoring and evaluation is essentially about learning – in your project and in your organizations.

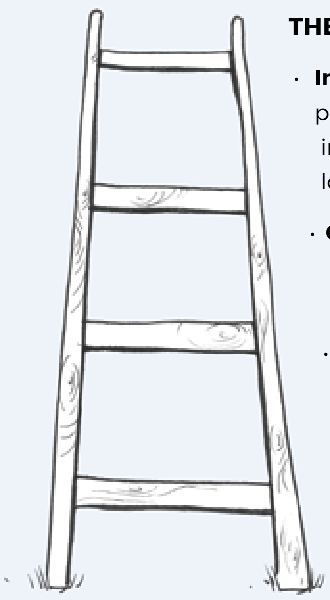
When you are monitoring and evaluating how you are doing in your project, it is useful to pose yourself the **three universal evaluation questions:**

- **Are we doing what we said we would do?**
- **Are we making any difference?**
- **Are we doing the right things?**

You can use the questions to run through the projects promised project activities and results on an overall level – and assess if you are doing the right thing to achieve your objectives.

You can also use the questions to evaluate smaller parts of the project, e.g. an activity such as a training.

Often the people who carry out the project on a daily basis will be the most knowledgeable on what has been done and with what consequences. When you reflect



THE IMPACT LADDER

- **Impact.** The long term changes. Often difficult to measure at the end of the project period but can be measured within 3 to 5 years after the project period. For example, individuals have used their new leadership skills to make positive changes in the local community.
- **Outcomes.** The changes that happen during a project period and are fully delivered by the end of the project. For example, participants in the training are using their new leadership skills in the partner organization.
- **Outputs / results.** The tangible things that took place as a result of the activities. For example, young volunteers who participated in the training express that they gained leadership skills.
- **Activities.** The actions made by the project. For example, a training in youth leadership.
- **Baseline.** The situation before the project. For example, only few young people have leadership skills.

on the progress of your project, it is a good idea to gather the people who implement the project and go through the three universal evaluation questions.

At what level are you measuring change?
You can do monitoring and evaluation at different levels of the project – ranging from that you monitor which activities have been carried out to evaluating whether you have reached your project objective.

There is often a confusion of M&E terms and the Impact Ladder helps to define terms and levels for measuring if you are making a difference.

It is easy to monitor if the project activities have been carried out according to plan – but what is really interesting is to find out if you are making a difference and if you are doing the right things.

How to make M&E a valuable learning journey
It is our experience, that M&E becomes most useful and inspiring, when you prioritize **learning together in your partnership** – and anchor the learning from each project in your organizations.

Learning processes and spaces are different in each organization. You need to find a good rhythm for your learning and ensure that you have sufficient time and space, where people can find a place to reflect, get support and inspiration.

ASK YOURSELVES...

How do you share knowledge and lessons learnt in your organization? How do you pass on learnings to the next generation of volunteers?

In the **planning** phase it is a good idea to talk through the logic that underpins your project. You can think of it as a way of making a road map to change: What is the thinking that lies behind your planning? How do you think social change happens? What causes people to think, feel or behave differently?

Depending on your project, it can be a good idea to involve the people who will participate in the project in talking about what change they would like to see and how progress can be seen along the way.

During the project – Once the project is running it is important to take reflection time. It is like being on a journey, where you sometimes stop at resting places and take the opportunity to look back, reflect on the trip so far and review progress.

When you do M&E at key points during your project, you can make use of the learning to improve your project activities along the way.

LEARNING PRACTICES IN ORGANIZATIONS

The Barefoot guide provides a lot of good stories, reflections and advice on how you can strengthen learning practices in your organizations.

If you regularly check if you are on course and adjust the project along the way, you will have a better chance of achieving your objectives.

It is a good idea to have regular meetings for the team that works with the project on a daily basis, for instance weekly or monthly meetings, where you coordinate, share knowledge, get support for challenges and learn together.

It is also a good idea to put aside time for longer review meetings and workshops at key points during the project period, for instance at the start of the project, after key activities, midway and at the end of the project. That gives you time to go through the project achievements as well as share experiences, get ideas and advice for how to adjust the project activities.

At the end of the project – When you finish the project you have come to the end of the journey – until the next project starts. At this point, look back at what you did, reflect on if it made a difference and if you did the right thing.

In youth organizations, there is often a big turnover of volunteers and staff. It is therefore important to document the learnings and share them with new volunteers so that the experiences can be used, when a new project is planned.

METHODS FOR M&E

There is a wide range of approaches and tools you can use for your M&E. Here are some suggestions from DUF.

The Logical Framework Approach is useful as a tool for mapping out the logic of your project and planning your activities. It is also a valuable tool for monitoring progress and change along the way. You can measure progress on the project objectives against the success criteria and decide on means for verifying the changes. Use the LFA as a dynamic planning tool, that must also be adjusted when the context changes or when you encounter challenges to the original plan.

Team Self Review uses the experiences of the people that work with the implementation of the project on adaily basis. This method can be used for reflecting on the project along the way as well as for final evaluations.

Your **plan for monitoring and evaluation** is a tool to manage, learn from and adjust your project along the way. DUF recommends you to include M&E activities in your project plan – and budget for expenses such as transport and food for an evaluation meeting.

PRINCIPLES FOR GOOD M&E

Meaningful M&E is about how you think and what you do. Good tools can help you – but essentially it is about creating everyday practices of learning in your organization.

- **Ownership.** Make your M&E meaningful to you and to the persons who participate in the project. Meaningful M&E starts when you create a project – make sure the project objectives make sense to the participants and involve them to see if you are making progress.
- **Use it or lose it.** M&E is essentially about learning if you are making progress and if you are doing the right thing. Make sure to share lessons learnt in your partnership, use it for adjusting the project and anchor the learning in your organization so you can use it for the future.
- **Integral to the project.** Think about how you will monitor, evaluate and learn from your experiences – from the start of the project.
- **Fit for purpose.** Interviews are good for in depth understanding of individual experiences – surveys can provide an overview of opinions, behaviors, needs among a group of people. Use methods that best help you get the information you want.

REPORTS TO DUF

At the end of your project, you must explain to DUF to what extent you have achieved your project objectives – and what you have learned along the way. DUF would like to learn from the successes and challenges you have faced and the lessons you have learnt. That way, we can better advise other international partnerships. Projects don't always go according to plan – and it is not expected that you did everything you said you would do in the exact way you planned it. What is more important is that you are committed to getting better at making a difference, learning from your experience and sharing the lessons learnt with others.

WHO DO YOU DO M&E FOR?

When you receive a project grant from DUF, you must evaluate the project at the end and be able to demonstrate to what extent your project has made a difference. However, it is equally important that you do M&E in a way that is meaningful and useful for you – so that you learn from your successes and challenges and use this learning.

Most Significant Change Stories and **Impact Grid** is about collecting and analyzing participants' stories to understand the changes that have happened due to a project. The stories give examples of the knowledge, skills or confidence participants have gained and how they use it in their lives.
The method is well suited for catching both expected and unexpected outcomes of a project – and can deliver a rich picture of what has happened.

LEARN FROM YOUR REPORT

Here are some ideas that make reporting a better learning experience:

- Move from a focus on the activities (by your organizations) to a focus on what changes people experience in their lives. Don't only look at what happened, but also at what made the changes possible.
- Focus on what went well and what needs to improve. Include challenges, lessons learned and recommendations.
- Look into both expected and unexpected results

The Kirkpatrick model helps you to assess learning outcomes of training and education processes. It highlights the importance of follow up to participants so that they apply learning back in their organizations.

This paper presents DUFs considerations on monitoring, evaluation and learning – as well as ideas and tools for working with your partnership.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organizations and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to how you should work with M&E and learning. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

Interviews are useful for getting in-depth knowledge and context understanding from stakeholders in a project.

Surveys and questionnaires are useful for getting responses in a uniform way from a large group of people or a statistically representative group of respondents.

Focus group discussions gather a group of people to get their views on key issues and can be useful, when deciding how to work with a specific issue.

Case studies are useful for evaluations. They focus on an aspect of a project and describe how the project has affected a given group of people. You can use participatory methods to get a target group to give their experience of the changes that have happened due to a project.

Time Lines are useful for recording and talking about the history of a project or a partnership. It is a good tool for identifying key events or critical decision points and the effects of events on a project and its participants.

Participatory evaluation methods involve project participants in designing an evaluation process, collecting data and assessing the changes created by the project. This can help enhance learning and create ownership of the project outcomes among participants.

DUF has created the following toolkit papers:
- Tool: Team Self Review
- Tool: Most Significant Change
- Tool: Impact Grid
- Tool: The Kirk Patrick Model for Organizational Learning
- Tool: Planning for M&E in your project
- Tool: M&E based on the logical Framework Approach
- Tool: Timelines

FURTHER INSPIRATION...

Meet up with DUFs consultants
DUF can provide inspiration on how to strengthen learning in your organizations, supply more tools and give advice on the monitoring and evaluation work in your projects.

RECOMMENDED TOOL KITS AND LITERATURE

- Rick James, **Most Significant Change**
- **The Barefoot guide to learning practices in organizations and social change**

TOOL

TEAM SELF REVIEWS

WHY

The people, who have been running the project often knows the most about what has been done and achieved in the project. They are also the people who have to put any lessons learnt into practice. They possess a treasure chest of information on the project – and the Team Self Review process lifts the lid on this box of treasure.

WHEN

The Team Self Review is a good method to evaluate your project at key stages – for instance for a midway review or for the final evaluation. It can also be used as part of a more regular reflection and learning effort in the team that implements the project.

The method can be used by a team, a department or an entire organization with every department carrying out a review.

HOW

The team allocates sufficient time to carry out a review – with a small project a few hours may be sufficient, whereas bigger or more complicated projects may require a day.

The task is to answer the **Three Universal Evaluation Questions:**

- Are we doing what we said we would do?
- Are we making any difference?
- Are we doing the right things?

The team needs to prepare by re-reading the relevant project documents and the documents that have to do with their area of responsibility since the last review (for instance training evaluations, field visit reports, project reports).

The team then come together. The session is facilitated by a team member or an external facilitator. The team goes through each of the questions, reflects together and come to an agreed answer for each.

The Team Self Review is a very powerful tool, but it does require that teams are ready to reflect on what they find difficult – both in carrying out the project and in the process of doing the Team Self Review.

Although the questions are simple, it can be a difficult task to do a Team Self Review. Difficult because many people are not used to being asked for their opinions in an open and honest way – and difficult because they often do not know the answers to the three questions.

The first question can be challenging if your team doesn't have clear role descriptions or are not aware of the details of the project. The second question is nearly always a big challenge because most teams collect data and write reports on what they have done, - but not on what the outcomes or changes were.

It is a good idea to notice, when you have difficulty answering a question – and think about why that is. Is it because you do not have clear roles? Is it because you don't know what the effects of your project are on the target group? Is it that there has been a big turnover in team members, and there has been little handover and memory of what has been done?

The list of the problems that the team has faced in the Team Self Review can be used for a reflection on what to improve in your team work during the coming months.

Source: INTRAC

To get useful reflections going on how you are making a difference you need to *go up in a helicopter and look down at the project.* What are the most significant changes your project has led to among the stakeholders and the target group?

To ensure learning, it is important to be open and honest – and to be able to talk about both successes and challenges.
The facilitator must ensure that the team doesn't get bogged down in minor details, this is an opportunity to see the bigger picture.

To ensure that learning can be used in the future, the team is asked to produce **a small Self Review** report of 1-4 pages.
It is not about writing a lot – but rather to distill an agreed essence.

The report should capture:

- Whether the team is doing, what it intended to do – and if there are any divergence, the reason for doing things differently
- The most significant changes that can be seen due to the project
- The teams assessment of whether they are doing the right things and in the right way. Also, the team should include learning points for the project that is being evaluated or future projects.

The small reports can remain the property of the team, but it can also be useful to share the learnings to develop a culture of trust and mutual learning – in the organization and with stakeholders outside of the organization.

This tool paper is inspired by material developed by INTRAC

THE DANISH YOUTH COUNCIL

TOOL

IMPACT GRID

WHY

The **impact grid** is a form of participatory monitoring and evaluation. It gathers participants to tell about significant changes that have happened to the participants in a project.

Stories provide 'thick, rich' description of changes based on peoples experience of changes in their own lives through stories – who did what, when, why and why was the event important? It is especially useful for making sense of complex information and capturing unexpected as well as expected changes.

The impact grid helps to organize the stories so that you identify the importance of changes and to what extent the project has contributed to creating the change.

WHEN

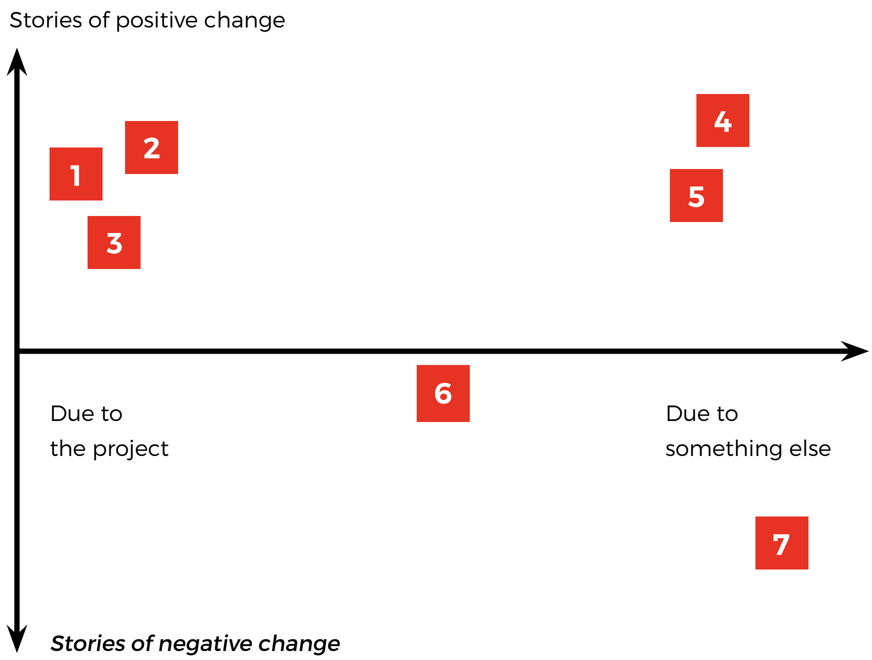
Stories can provide information about changes throughout the project and contribute to learning along the way. You can use it over the life of the project with the same participants and track how and when changes happen.

It is most often used at the end of a project or at time when the project has been running for long enough for changes to take place. For instance, if you use the impact grid to evaluate a course, the method can be used three to six months after the course, but not immediately at the end of the course.

HOW

The impact grid consists of a vertical axis divided by a horizontal axis – so that there is a positive area for stories of a positive effect and a negative area for stories with an adverse effect. The horizontal axis shows the respondents assessment to what extent the change described in the story is due to the project – in other words, if they believe the change would have happened without the project or if they believe the change is due to the project.

IMPACT GRID



To do an impact grid exercise, you must first bring people together in a workshop. The best number of people in a group to get the process to work well is from 6-12. If there are more people, it is better to divide into smaller groups.

A facilitator, runs the process. It can both be a person involved in the project or an outsider with no vested interests in the outcomes. The facilitator outlines the recent history of the project to remind people what has happened. It is important to do this in a way that you avoid biasing the participants to remember specific activities and results.

Participants are then asked to think about how the project has affected them. You can use the following question or craft your own: "*What have been **the most significant changes** that you have experienced during the project*"?

Each person writes down examples on post it notes. There is no limit how many examples each person can compile – in practice most people identify 2 to 4. Each person then share their stories with a partner – this helps them clarify the experience and they may get new ideas about an outcome they didn't think about at first.

The group then comes back together and each person briefly gives their example and sticks it onto the grid, where they think it fits. They can be challenged by others to reconsider the location and move the story if they agree.

Once the exercise is over the facilitator numbers each story and draws an A4 copy of the grid showing the position of the numbered stories. If the tool is being used as part of an evaluation, the grid with the stories can be reproduced as an appendix, while the conclusions can be presented in the report.

You can use the exercise as a starting point for dialogue on the patterns of change and the ways change happen – either with participants or in the project team.

- What is the proportion of positive and negative stories?
- What are the characteristics of the negative stories and of the positive stories?
- What characterize the stories of changes that were said to be due to the project?

Instead of making a grid, you can also draw a big tree on a flip chart and put your post its with stories of achievements on the tree as leaves. If you want to, you can use the metaphor of the tree to talk about the soil in which the changes have grown, the root causes of the changes, the fruits that have been harvested and the seeds of change that are spreading.

This toolkit paper is inspired by material developed by INTRAC

THE DANISH YOUTH COUNCIL

TOOL

MOST SIGNIFICANT CHANGE STORIES

WHY

The **most significant change** (MSC) technique is a form of participatory monitoring and evaluation. It collects stories about significant changes that have happened among the participants in a project. The project participants are involved in deciding the sorts of change to be recorded and in analyzing the stories – that way both the project participants and the project team learn from the process.

The Most Significant Change method does not make use of pre-defined indicators, especially ones that have to be counted and measured. Instead it draws of peoples experience of changes in their own lives through stories – who did what, when, why and why was the event important?

It is especially useful for making sense of complex information, creating 'thick, rich' description of changes and capturing unexpected as well as expected changes.

WHEN

Most Significant Change stories can provide information about changes throughout the project and contribute to learning along the way. It most often used at the end of a project or at time when the project has been running for long enough for changes to take place.

If you use most significant change stories to evaluate a course, the method can be used three to six months after the course, but not immediately at the end of the course.

HOW

Most Significant Change stories can be used as methodology on its own or together with other methods – for the **impact grid** evaluation. The impact grid helps to organize stories, so that you identify the importance of changes and to what extent the project has contributed to creating the change.

If used with the impact grid, most significant change stories are collected by asking a simple question such as "*During the last 3 months, in your opinion what was the **most significant change** that took place for participants in the project*"? as a framework for the impact grid exercise.

People are then asked why they consider the mentioned changes to be the most significant.

In its **full version**, the most significant change method goes through a long and systematic process to identify and document the stories that speak of the most significant changes in an organization and project.

It starts off by introducing the method to a wide range of stakeholders, identifying focal areas of change and collect stories. The collected stories are then filtered through different levels of the organization and project. Each level reviews the stories and selects the most significant stories – over several rounds of storytelling and collection. At the end of the process a document is produced with the selected change stories accompanied by the reasons the stories were selected.

The stories can be used for internal learning, for case stories for advocacy and for dialogue with funders on the changes that the project achieves.

For futher information on how the Most Significan Change method can be used for a comprehensive evaluation please confer with the guide The '**Most Significant Change**' (**MSC**) **Technique. A guide to its** use written by Rick Daves and Jess Dart, 2005

THE DANISH YOUTH COUNCIL

TOOL

THE KIRKPATRICK MODEL FOR EVALUATING TRAINING AND CAPACITY BUILDING

WHY

It often happens that participants have a great time on a workshop and then struggle to apply the ideas back into their organizations – because it is difficult to find the time or the support to think through how the new ideas might work out in practice.

The Kirkpatrick Model (1965) highlights the need for follow-up and support to participants in order that they can apply the learning back into their organizations.

Part of applying learning is the experiential processes that often mean it takes time to get it right for the context participants are working in. This is often far harder than just attending a workshop, and the role of mentoring is essential to support the learning back in the organization or the project, people are part of.

WHEN

Use the Kirkpatrick Model when you design and evaluate learning processes and follow-up.

HOW

Use the Kirkpatrick Model for reflecting on and discussing how learning can be supported and followed through – right from the workshop or training event through to contributing to organizational change. Bear in mind, that there are also lots of factors which are outside the control of the trainers or the learners themselves.

The following diagrams illustrate the model as documented by Kirkpatrick (table 1) and how the model has tried to be applied to a capacity building program (table 2).

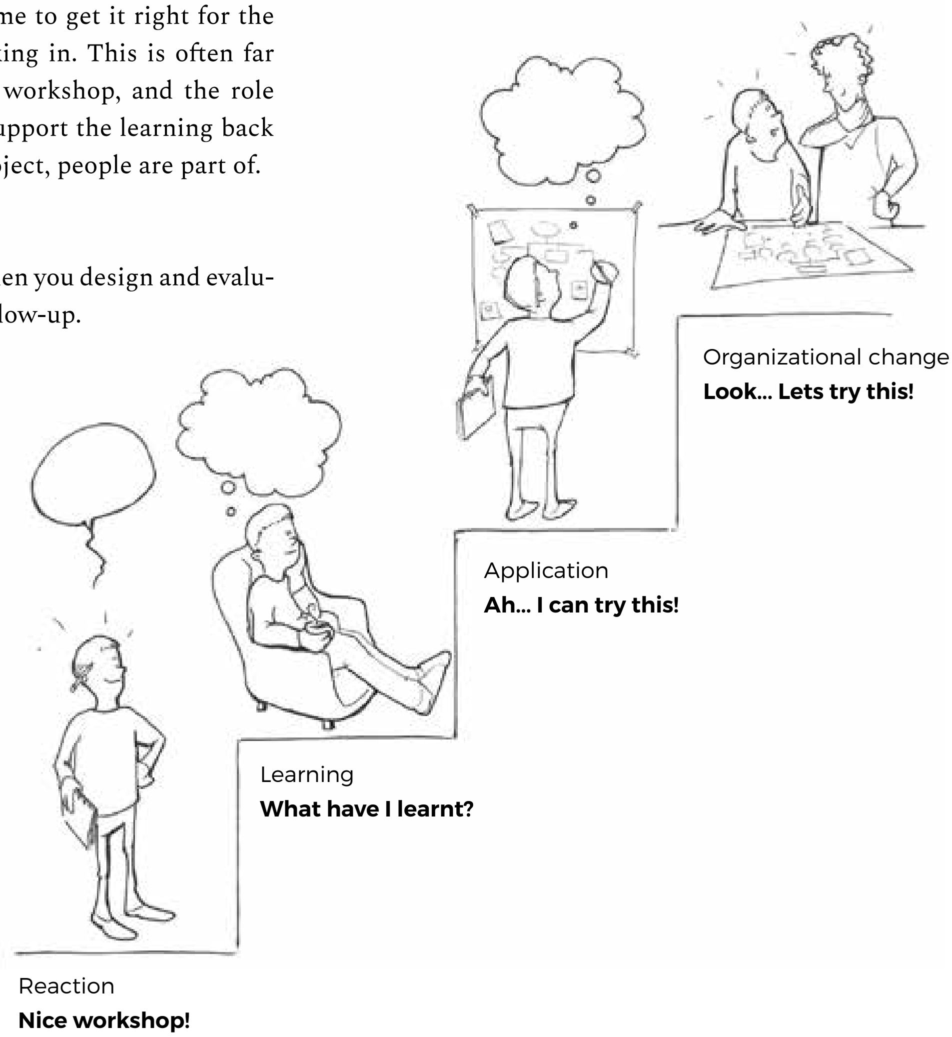


TABLE 1: THE MODEL AS DOCUMENTED BY KIRKPATRICK

KEY STAGES OF KIRKPATRICK	REACTION	LEARNING	BEHAVIOUR CHANGE	ORGANIZATIONAL CHANGE
Description of changes	"This was really nice"! The feel good factor at the end of an event. This is most often assessed at the end of a training.	"Hmm, what have I learnt". This is what has been learnt and those are the things from the training they feel is relevant to them.	"Ah... I can try this". When the participant applies what she has learnt, the learning is translated into behavior changes.	"Let's change this". When the participants influence the organization, the training has led to change in the organization.
How can you assess these changes?	End of workshop evaluation, feedback forms.	Follow up conversations, mentoring, questionnaires, visits	Review practice and lessons learnt e.g. in teams. Stories of change	Organizational assessment, reviews, case studies, stories of change.
When?	End of training	3-6 months after training	3-12 months after training	9-18 months after training

Source: INTRAC

TABLE 2: THE KIRKPATRICK MODEL AS APPLIED TO A CAPACITY BUILDING PROGRAM

REACTION	LEARNING	BEHAVIOR CHANGE	ORGANIZATIONAL CHANGE
Drivers that give positive reaction	*Drivers that enable learning*	*Drivers that influence and support behavior change*	*Drivers that influence and support organizational change*
Select the right participants – with a capacity for learning and an interest in learning	Participants are expected to feed back learning to the organization	The participants accepts that they need to change behavior and are open to change	The organization accepts it needs to change and is open to change
Work with different learning techniques to fit the different learning styles of participants	Time and space to review learning	Supporting and open environment to experiment and try out learning	Mandate from leadership to promote new practices
Relevant and accessible materials	Opportunity to share with others	Positive and affirming feedback from others	New practices are understood by all as a part of the purpose of the organization
Inspirational, exciting, competent trainers	Supporting and open environment to experiment and try out learning	Opportunity to reflect on an individual basis	Time and space is given for others to learn. Others are motivated to learn
Good process, good venue and food	The action plans are realistic and achievable	Review the tasks the participant have in the organization and adjust to new learning and practice	Opportunity to reflect on an individual basis and with others
Positive group dynamic			Review of tasks to adjust to new learning

Source: INTRAC

TOOL

PLANNING FOR M&E IN YOUR PROJECT

WHY
If you think through your M&E from the start of the project it will be easier to regularly check if you are on course and adjust the project along the way. That way you will have a better chance of achieving your objectives.

WHEN
Start thinking about how you will monitor and evaluate your progress, when you formulate the objectives and success criteria for your project. Create your plan at the start of the project – and use it as a dynamic tool throughout the project to see if you are on track and adjust your approaches if necessary.

HOW
You can monitor and evaluate at different times in your project. DUF suggests you do M&E activities in your project at key points:

Pose yourself these questions before you plan your monitoring and evaluation activities:

Who are you doing the M&E for?
- Different stakeholders have different interests and priorities as to what they would like to learn from a monitoring and evaluation activity: Are you doing the learns from it? Is it for documenting results for the leadership of your organization? Is it to show DUF that your project made a difference? Is it for the people who participated in the project and benefited from it to celebrate the changes that happened?

What is going to be monitored or evaluated?
- Are you evaluating a training activity – or monitoring to what extent you are reaching your project-objectives?
  What resources do we have for the M&E activities?
- What resources are available: Time, money and people?

How do we measure if the project has changed anything? To have a basis for comparison, it is a good idea to conduct a baseline study when the project starts.
A base line study maps out the situation at the start of the project. When you complete the project, the study may be repeated. By comparing the two studies, you can see the changes that have happened during the project period.

	BEFORE THE PROJECT	START OF THE PROJECT	MID WAY	AT THE END OF PROJECT	SOME TIME AFTER THE PROJECT
Ask yourself	How do we formulate our project objectives? Success criteria?	What data do we need from the start in order to see what has changed at the end of the project?	How far are we? Are we making a difference?	Have we made a difference? Have we done the right things?	Have we made a difference? Have we done the right things?
Purpose	Integrate M&E and learning in the project from the start	What is the situation at the start of the project?	Adjustment of the project activities to reach objectives	Assess changes. Learn from experience.	Assess changes in the longer term. Learn from experience

If you only have a short time and no money, the process will look different from when you do a project visit with money for an evaluation activity and a team of evalua tors.

When will you do the monitoring and evaluation?

- At the start of the project, mid-way or at the end of the project? At the end of a project activity? During your monthly project team meetings?

Who will do the M&E?

- Is it the project leader at the head office? The volunteers in the field?

How will you follow up on learnings – do you need to make any adjustments to your project?

- Will you need to take any actions based on what you learn through your M&E activity? Will you revise your project plan or your approach?

Based on your responses, you can think through the design of the monitoring and evaluation process.

EXAMPLE OF A SIMPLE M&E PLAN

EXAMPLE OF M&E ON REACHING A PROJECT OBJECTIVE

Immediate objective 1: By the end of the project period, June 2017, 30 youth leaders from the Malawian partner organization at the level of 3 local branches use participatory methods, so that child and youth members are actively involved in planning and decision making on activities

WHAT	WHEN	HOW	WHO	ANY ADJUSTMENTS?
Success criteria for objective 1: By the end of the project 23 out of 30 youth leaders (75%) express enthusiasm towards participatory methods	At the end of the project	Survey among youth leaders at the annual meeting	Project leader	Is there a need to adjust our approach of introducing participatory methods?
Success criteria for objective 1: By the end of the project children and youth in at least 2 out of 3 local branches explain that they are involved in planning and decision making on activities.	At the end of the project	Focal group dialogue with children and youth in 3 local branches	Evaluation team with project leader	Is there a need for adjusting our a pproach to involve children?

EXAMPLE OF M&E OF THE RESULTS OF A PROJECT ACTIVITY

Results: A 3-day training in participatory methods has been carried out for 30 youth leaders from 3 local branches

WHAT	WHEN	HOW	WHO	ANY ADJUSTMENTS?
Success criteria: By the end of the training 30 youth leaders express that they have gained new knowledge and skills in participatory methods	By the end of the training	Written evaluation and an oral evaluation in plenary Trainers observations on participants skills	Project leader and trainer	Any lessons learnt for how to do a similar course?

TOOL

M&E BASED ON THE LOGICAL FRAMEWORK APPROACH

WHY

Most DUF projects are designed based on a planning tool called the "Logical Framework Approach". The LFA is good for creating an overview of a project and checking if there is a logical connection between the activities you do, the results you achieve and the overall development goals you are aiming to contribute to.

The idea is that you use the LFA matrix to manage your project and check if you are on track throughout the project.

The basis for monitoring and evaluation is created, when you formulate your immediate project objectives and your success criteria in the LFA matrix.

A monitoring plan will help you to regularly check if you are on course and adjust the project along the way. That way you will have a better chance of achieving your objectives.

WHEN

Start thinking about how you will monitor and evaluate your progress, when you formulate the objectives and success criteria for your project. Create your plan at the start of the project – and use it as a dynamic tool throughout the project to see if you are on track and adjust your approaches if necessary.

HOW

How to plan your M&E based on your LFA

Based on your LFA, you can think through the design of the monitoring and evaluation process – from the start of the project to the end of the project.

CLEAR OBJECTIVES

Projects carried out by DUF supported partnerships are often about awareness-raising and advocacy on youth

» How do we measure if the project has changed anything? To have a basis for comparison, it is a good idea to conduct a baseline study when the project starts. **A base line study** maps out the situation at the start of the project. When you complete the project, the study may be repeated. By comparing the two studies, you can see the changes that have happened during the project period.

	BEFORE THE PROJECT	START OF THE PROJECT	MID WAY	AT THE END OF PROJECT	SOME TIME AFTER THE PROJECT
Ask yourself	How do we formulate our project objectives? Success criteria?	What baseline data do we need in order to assess changes at the end of the project?	How far are we? Are we making a difference?	Have we made a difference? Have we done the right things?	Have we made a difference? Have we done the right things?
Purpose	Integrate M&E and learning in the project from the start	What is the situation at the start of the project?	Adjustment of the approach to reach objectives	Assess changes. Learn from experience.	Assess changes in the longer term. Learn from experience
Method	LFA or Theory of Change	Base data collection on success criteria and objectives	Follow up on relevant success criteria and objectives	Base data collection on LFA success criteria and objectives – and complement with more open evaluation methods	

KEY CONCEPTS IN LFA

The development objective is what you want to change in the long term.
This could for instance be that Projects by youth organizations are planned and implemented with and by youth rather than carried out for youth.

The immediate objectives set out what you expect to achieve by doing the project. They describe the new or changed situation, which you expect to see by the end of the project period.
This could for instance be that by the end of the project 30 youth in the partner organization plan and manageprojects effectively together with the staff of the partner organization.

Success criteria (often called indicators) are used to assess if the project achieves what you have planned. Success criteria can be used both for ongoing measuring of progress (monitoring) and at the final evaluation. This could for instance be that 30 youth have expressed new confidence in project management after the training or 30 youth have planned and carried out projects together with staff of the partner organization by the end of the project.

Results (often called outputs) are produced by the activities you do in the project and contribute to reaching the objectives. This could for instance be that 30 youth have improved skills in project management.

Activities are the actions you do in the project to achieve your results.
This could for instance be a training in project management for 30 youth.

issues, youth empowerment and organizational capacity-building.
These are broad and general terms, which can be understood very differently by the various project participants.

Project objectives frequently feature expressions such as "youth has been empowered" or "capacity has been built".

However, it is difficult to steer a project based on a vague immediate objective – and it is difficult to monitor and evaluate on progress.

A vague objective is likely to be interpreted differently bydifferent people – and it is difficult to measure how progress is made and to what extent the objective has been achieved.

CLEAR OBJECTIVES

In the example of "capacity has been built..." the objective could be formulated more clearly to describe what the capacity building entails and what change it creates.

To the extent possible, the immediate objectives should answer the following five questions – 'the five Ws'.

When? By what time should the change be achived?

Who? Who is involved?

Where? Where will the change take place?

What has happened? What is the new situation, what is the qualitative change?

How much has happened? What is the amount of change?

Answering these questions, the immediate objective could instead be phrased:
"By the end of the project period, June 2017, 30 youth leaders from the partner organization at the level of 3 local branches have use participatory methods, so that child and youth members of 3 local branches are actively involved in planning and decision making on activities".

SMART SUCCESS CRITERIA

When you are deciding on your success criteria it is a good idea to check if they are SMART:

Specific – Be precise. What is the change you want to see? Who is involved? What quantity and quality indicate success?
Measurable – Is it possible to measure success criteria at reasonable cost and effort? How?
Achievable – Is it realistic to reach the target set out in success criteria?
Relevant – Is the success criteria relevant to the project objectives and the people who take part in the project?
Time-bound – When will the success criteria be reached? It can be useful to set milestones or intermediate goals if your project runs for a long period of time.

SUCCESS CRITERIA

In order to make it even clearer and more concrete what you wish to achieve, the LFA also makes use of success criteria. Success criteria are the measurable indicators that are used to assess if your project achieves the changes you want to create.

Usually one or more success criteria are formulated for the overall development goal, for each immediate objective and for the results. It is not necessary to set up success criteria for the activities.

When setting success criteria, ask yourself: "What is the change we would like to see with this objective or result? How would we be able to see if change has happened?"

If your immediate objective is "youth have been empowered", how would you be able to see that youth have been empowered? Maybe they have gained new leadership skills and put them to use in their organization – or they have learnt how to handle difficult situations in their lives?

WHAT METHODS DO WE USE TO MEASURE IF WE HAVE MADE A DIFFERENCE?

When you do your LFA matrix it is also good to consider how you will measure your success criteria. What methods are you going to use? What is realistic and possible?

AN EXAMPLE OF A LFA MATRIX

Overall development objective	To strengthen youth participation and influence in youth organizations in Malawi	
Immediate objective	By the end of the project period, June 2017, 30 youth leaders from the Malawian partner organization at the level of 3 local branches use participatory methods, so that child and youth members are actively involved in planning and decision making on activities	**Success criteria:** By the end of the project 23 out of 30 youth leaders (75%) express enthusiasm towards participatory methods By the end of the project children and youth in at least 2 out of 3 local branches explain that they are involved in planning and decision making on activities.
Output / results	By Jan 2016, a 3-day training in participatory methods has been carried out for 30 youth leaders from 3 local branches	**Success criteria:** By the end of the training 30 youth leaders express that they have gained new knowledge and skills in participatory methods
Activities	3-day training in participatory methods Learning needs assessment	

AN EXAMPLE OF A LFA MATRIX

Overall development objective	To strengthen youth participation and influence in youth organizations in Malawi		
Immediate objective	By the end of the project period, June 2017, 30 youth leaders from the Malawian partner organization at the level of 3 local branches have learnt and use participatory methods, so that child and youth members are actively involved in planning and decision making on activities	**Success criteria:** By the end of the project 23 out of 30 youth leaders (75%) express enthusiasm towards participatory methods By the end of the project children and youth in at least 2 out of 3 local branches explain that they are involved in planning and decision making onactivities.	**Means of verification:** Survey among youth leaders Focal group dialogue with children and youth in 3 local branches **Means of verification:** Questionnaires by the end of the training and verbal final evaluation
Output / results	By Jan 2016, a 3-day training in participatory methods has been carried out for 30 youth leaders from 3 local branches	**Success criteria:** By the end of the training 30 youth leaders express that they have gained new knowledge and skills in participatory methods	
Activities	3-day training in participatory methods Learning needs assessment		

A brainstorming session may produce a lot of good ideas on **success criteria** from which you can select the best ones. Perhaps you can look into how other organizations in the same field do M&E and ask about their experiences of monitoring and evaluating their projects. Make sure both the partner organization and the Danish organization find the success criteria meaningful and possible to monitor.

KEEP IT SHORT AND SIMPLE

Make success criteria and objectives as clear and simple as possible. That way it will be easier for you to steer the project – and it will make monitoring and evaluation as simple as possible. One or two precise success criteria that are relevant and easy to measure are much more useful than ten inaccurate and complex indicators.

The Logical Framework Approach has been in use in development cooperation for many years. If you are not familiar with the LFA method, there is a wide range of literature and courses available. You can read more about LFA in the CISU publication **Guide for the formulation of NGO projects** or NORADs **LFA handbook**.

The LFA does have its limitations as it is very focused on measuring if you have achieved the change you planned for. It is good to complement it with other approaches that catch both intended and unintended changes and looks beyond the project LFA matrix.

TOOL

TIMELINES

WHY

Time Lines are useful for recording and talking about the history of a project or a partnership. It is a good tool for identifying key events, critical decision points and the effects of events on a project and its participants.

Timelines help teams learn from the past and is a good way of introducing new team members to what happened in the project and partnership before they got into the team.

Time lines are also useful for recording and analyzing external influences on the project.

WHEN

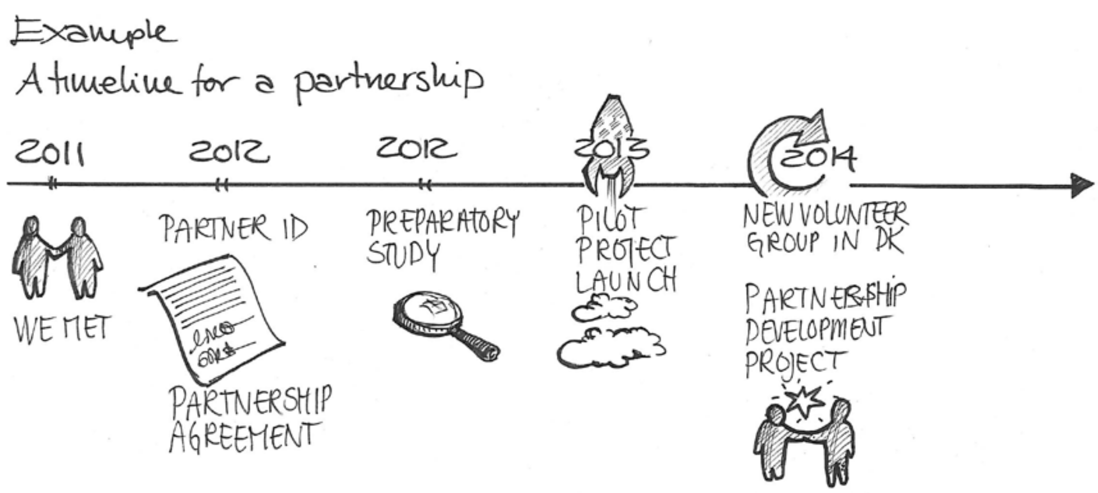
A time line can be used at the start of a project to track events in the partnership and previous projects as a background to the new project.

Time lines can be used during the project to track progress regularly – and they can also be used midway or at the end of a project to track the changes that have occurred during the project.

HOW

The time line is a tool for dialogue and should be done as a team discussion process.

Pin one or more large pieces of paper onto a wall and draw a horizontal line – or use a piece of tape to indicate a horizontal line on the wall. The first date marked on the timeline is usually the projects start but can be an earlier date if important events occurred that affected the project before the start date.



You can also use images of roads or rivers to draw up important moments, challenges and successes during the life of a project, partnership or a person. A river is changing its width, current, direction and different features such as whirlpools, islands, rapids and forks, can represent changes and events in their histories.
A road map can show different challenges, detours, short cuts and opportunities that have happened along the way of a journey.

The team discusses the events that occurred during the previous months – their activities and results and marks the most important events on the time line.

They can also record any external factors that had a negative or positive effect on carrying out the project. This is especially useful when you are discussing to what extent the project has produced or contributed to the observed changes – or if any outside factors have also contributed.

The time line can be kept as a big drawing that can be used for review meetings and added to during discussions – and an electronic version, that can help in reporting.

VOLUNTEERISM

THE DANISH YOUTH COUNCIL

POSITION PAPER

VOLUNTEERISM

What is volunteerism all about? What is the connection between volunteerism, associational life and participation in democracy? How can you promote voluntary engagement and influence in an organization? If you are asking yourself these questions, this paper is for you. It presents DUFs considerations on volunteerism – as well as lessons learnt, ideas and tools for understanding and working with volunteers in your organizations

WHY WORK WITH VOLUNTEERISM?

DUF works to promote young peoples' participation and influence in civil society organizations as well as their democratic engagement in society. Young peoples' voluntary work and engagement in a cause is an important element of active participation in organizational life and in broader society. That's why DUF asks you to work with volunteerism in your partnership and project.

Volunteering happens in many different ways – it depends on the organization and society you are part of. In DUFs experience meaningful volunteering work is based on a sense of social responsibility, willingness to contribute, enthusiasm for a cause, a feeling of community– and because it is fun.

WHAT IS A VOLUNTEER?

A volunteer is a person, who assumes a responsibility and commits time and energy to do something for the benefit of society, the local community or individuals/ groups outside of one's immediate family.

Voluntary work is undertaken freely and by choice. It is unpaid, although volunteers can sometimes receive compensation so that they don't spend money by volunteering.

When young volunteers are invited to participate in the decision making in their organizations in a democratic way, they are more likely to also engage as active citizens and participate in democratic processes in their society. And young people are often more keen to volunteer, when they have a say in their organization.

A CROSSCUTTING REQUIREMENT

DUF's international work rests on three crosscutting requirements which your project has to integrate in the analysis of the context and the project design.
Volunteerism is one of the requirements.

In your project application, you must analyze the following:

- You must describe the local culture of volunteerism in the partner organization and the local society, and on that basis explain how the project can promote voluntary engagement.
- You must explain what role the volunteers play in the organization and examine their opportunities for influence.
- In your project, you must also consider how your project works to involve and engage volunteers and how to ensure that the volunteers' have a say in the organizations.

Young people learn democratic values, when they are trusted with responsibility, cooperate with others and are encouraged to participate in the decision making in their organization in a democratic way.

HOW TO WORK WITH VOLUNTEERISM IN YOUR PARTNERSHIP AND PROJECT?

DUF supported projects are required to promote volunteerism and ensure that volunteers have a say in the organizations that carry out the projects.

Volunteering happens in many different ways – it depends on the organization and society you are part of.

DUF recommends you look into volunteer culture during your partner identification and explore the theme together in your partnership in a preparatory study. It can be a good starting point to analyze the value and importance of the voluntary work in relation to the individual volunteer, the organization and the local society.

Some organizations are entirely managed by volunteers while others depend on staff to take care of the daily management.

Some organizations have boards consisting of young volunteers/ members, who are above the paid staff in the organizational hierarchy – whereas other organizations have children's councils or youth representatives in the board to ensure that young members and volunteers have a say.

Some organizations see the promotion of **volunteerism is seen as a goal in itself**, in other organizations **volunteers are understood as a means to reach a goal**.

It is important to ask yourself **how to motivate volunteers** – in your organization and partnership. Leading and managing volunteers requires similar competences as leading and managing paid staff.

And in addition, the manager of volunteers must motivate people to create results together without providing salaries.

DUF sees volunteering as a two-way relationship: You need to balance the **needs of the organization** with the **motivations of the volunteers**. And you cannot order volunteers to do something they don't want to do – they will just leave.

In DUFs experience **volunteers are motivated by many different things** – depending on who they are and their life situation. The motivations below are common, but the list is not exhaustive:

A CONVERSATION ON VOLUNTEER CULTURE

To **understand the volunteer culture in an organization** it is often useful to talk about the following themes:

- How is volunteerism **understood** and how are volunteers **valued** in the organization?
- What are the **organizational structures**, **roles and responsibilities** of staff, board, volunteers and members?

To **understand the volunteer culture of a society** it is often useful to look at the following:

- How is volunteerism **understood** and **valued** in your society? For example, do employers recognize volunteer experience? Is there a tradition of volunteerism in your society?
- What **formal policies** and **structures** support (or hinder) volunteer engagement in your society? For example a civil society policy, a national volunteerism council or financial support for volunteer based organizations?

A CONVERSATION ON VOLUNTEER CULTURE

The Youth Clubs of Denmark – Ungdomsringen (UNGR) and Straight Talk Foundation in Uganda have worked together for some years. During this time, the organizations have been inspired by each other's ways of working with volunteers. For instance Ungdomsringen has been inspired by Straight Talk to involve experienced youth to work together with younger members of the youth clubs, rather than only depending on paid adult staff.

The project manager, Allan, from UNGR explains: *"Before this partnership, volunteers were not part of the youth clubs. No one thought about them, we paid everyone. That time we had a lot of money, and after cut downs, I became aware of the Straight Talk Foundation concept of senior groups, where more experienced youth are teaching the younger ones. We adopted it into our work for a music festival, where we asked some of the older youth from the preparing group last year to come and teach the younger ones. The first time we did that the number of visitors to the music festival increased ten times and the teacher was mostly supporting, while the youngsters made the festival on their own".*

The partnership works together to set up youth clubs in Uganda. They has also decided to work strategically to motivate and retain experienced volunteers and have recently designed a volunteer strategy and policy to support the project work with youth clubs in Uganda.

Hassan, the project manager of STF explains: *"There must be a level of consistency in the people who are part of the project. Some of the youth we have to work with are completely new, so there must be a level of consistency to maintain continuity throughout the pilot and partnership projects".*

The partnership also gives an example of how the value and role of young volunteers can be understood in many different ways. DUFs ideas of volunteer engagement and influence can sometimes be difficult to understand for organizations that are not used to that young volunteers have a large degree of influence in the projects and partnerships.

Hassan explains: *"One of the challenges has been at the organizational level to make everyone understand the unique way of how DUF works. Because quite often, I get asked by the other staff: You are taking youngsters to Denmark. When will you take us? How sure are you that the youth have the competence level to represent the organization? And I say, it doesn't work like that. And I keep telling them in the staff meetings that the project we are having is one of those projects where you have that real meaning of youth participation, the right of youth to participate. We see that much more strongly coming out in the projects we have supported by DUF than any other projects that we work with at STF. This is not a project for the staff, but for the youth clubs. But slowly by slowly, people start to appreciate this".*

- **Meaningfulness:** I involve myself in a cause, that is larger than myself. I make a difference.
- **Responsibility and conscience:** I feel that I have a sense of duty towards my society.
- **Interesting activity:** I participate in an activity that is of interest to me and has a certain quality.
- **Community:** I'm socially stimulated by participating in a community of action.
- **Learning:** I learn a lot through my engagement – and use my competencies.
- **Influence and participation:** I have a say and I feel that I am listened to in regards to the activities I do. That makes me feel ownership to the work we do.
- **Personal recognition:** I feel recognized and valued for the work I do.

DUF recommends that you ask why volunteers like to work with your organization – and analyze how you can best motivate volunteers in their work.

It is equally important to find out what demotivates volunteers. In our experience, volunteers have a tendency to feel demotivated from working with an organization:

- When they are not welcomed and not appreciated – by staff and other volunteers
- When the communication from the management is not clear and timely and meetings are not well structured
- When the tasks and responsibilities are unclear – or when the framework for the work is too tight and the volunteers cannot influence their own tasks
- When they cannot get support and help
- When there is a tense atmosphere and conflicts are not resolved

It can be helpful to formulate a strategy for volunteer engagement as well as a volunteer policy to guide your work with volunteers in the project and in each organization.

A **volunteer strategy** helps you to translate your organizational vision into an overall plan for involving the volunteers to reach your organizational goals.

It entails a focus on:

- Why you involve volunteers
- How you involve volunteers, the purpose and priority of the work they do, how you divide roles and responsibilities among staff, board and volunteers.

A good match of partners is based on careful considerations and honest conversations about common interests and ways of working together.

It can be a challenge to match a volunteer based organization with a professional NGO with staff, as DUF support is geared for volunteer based projects.

In such cases it is important that both partners see a value in volunteerism and commit to promote volunteer engagement.

ASK YOURSELVES...

The DUF study "Associations for the future", 2014 shows that young people's engagement in democratic youth associations in Denmark contributes to:

- Young people's personal development, sense of identity and success in education and work life
- Young peoples' sense of social responsibility and active citizenship
- Social trust and inclusion of marginalized youth in social life
- Value to society

This paper presents DUFs considerations on volunteerism – as well as ideas and tools for working with volunteers in your partnership.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organizations and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to how you should work with volunteers. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

A **volunteer policy** is a tool to help you divide roles and responsibilities among volunteers, board and staff – and clarify expectations between the volunteers and the organizations. It entails a focus on:

- The division of roles and responsibilities in practice
- The expectations between the organization and the volunteers

A recurring challenge in many youth organizations is **attracting** new volunteers, **retaining** experienced volunteers and ensuring **handover of experience** among experienced and new volunteers. Often young people are moving home, they are starting education or work and they move on from one volunteer opportunity to the next as their interests change.

FURTHER INSPIRATION

There are no one-size-fits-all tools you can use for working with volunteers in your organizations and projects.

DUF has created a set of questions and ideas for how to start a conversation on volunteerism and volunteers:

The tools **Organizational landscape and volunteer culture** and **A dialogue on motivations** are helpful for exploring why and how volunteers are engaged in your organization and project.

The tools can also be useful – together with the tool **Good advice on attraction and retention of volunteers – and handover**, when you are considering how best to motivate and support volunteers.

Meet up with DUFs consultants

DUF can provide inspiration on how to work with volunteers in your organizations and give advice on the design of volunteer strategies and policies in your projects.

THE DANISH YOUTH COUNCIL

TOOL

RICH PICTURE OF THE ORGANIZATIONAL LANDSCAPE AND VOLUNTEER CULTURE

WHY

DUF supported projects are required to promote volunteerism and ensure that volunteers have a say in the organizations that carry out the projects. Volunteering happens in many different ways – it depends on the organization and society you are part of.

To understand the volunteer culture in an organization it is often useful to talk about the following themes:

- How is volunteerism understood and how are volunteers valued in the organization?
- What are the organizational **structures**, **roles** and **responsibilities** of staff, volunteers, members?

A Rich Picture drawing can help you to capture and analyze complex organizational relationships – and can provide a lot of information in a nuanced and holistic way.

WHEN

A rich picture of an organization and its volunteer culture can be useful to start up a dialogue with an organizations management on volunteerism during partner identification and preparatory studies. It is also a useful analytical tool, when drawing up volunteer policies and strategies and discussing issues such as motivation, recruitment, retaining and handover. It is good to draw up images with both the organizational management and volunteers – as their perspectives may differ.

HOW

Draw a Rich Picture with a focus on exploring the volunteer culture in your organization.

Show where the volunteers are placed in the organizational structures, what their role is and how their relationship is with the rest of the organization and in the project. Include key people, teams and structures

HOW TO DO RICH PICTURES

Rich pictures can be drawn in many different ways; here are some guidelines:

1. You don't have to be an artist to produce a rich picture. All you need is a very large piece of paper (flipchart-sized or bigger), lots of coloured pens and some time to think.
2. The focus of the picture should be the issue you want to explore in your organization
3. Use all the space available – spread out the parts of your picture but leave some space for adding new insights to the picture along the way
4. Include yourself in the picture – you don't have to be at the centre but you should be in there somewhere!
5. Include key people, teams and structures within and outside the organisation.
6. Represent the issues, problems and concerns of the people in the diagram using drawings, speech bubbles and thought bubbles (just like comic books).
7. Use metaphors – for example, if you think someone is forcing their views on others, draw them on an elephant!
8. Represent types of relationships using arrows, lines or any other way you can think of.
9. Represent the climate or quality of the relationships using symbols such as dark clouds, sunshine, lightning flashes or any other way you like.
10. Make it colourful and let your creativity flow.

within the organization –and maybe also stakeholders outside the organization. Also include the partnership connection in your drawing.

You can talk about the following questions on the basis of the rich picture:

How is volunteerism understood and how are volunteers valued in the organization?

Where are the volunteers placed in your organization?

- Where are the volunteers placed in regards to your partnership and projects?
- What other key persons, teams and structures are important in relation to the volunteers?

What is the relationship, the roles and responsibilities among staff and volunteers?

- What roles do the volunteers play in the organization?

Which tasks and responsibilities do the volunteers have now?

- To what extent and how are the volunteers involved in decision making processes around their own work?
  In regards to the organization? At what levels?

Are there any issues relating to gender? – in regards to the composition of the volunteer group, the tasks, the influence on decision making processes.

The Rich Picture is a tool taken from Soft Systems Methodology and the toolkit paper is inspired by material developed by INTRAC

TOOL

DIALOGUE ON HOW TO MOTIVATE VOLUNTEERS

WHY

It is important to ask yourself **how to motivate volunteers** – in your organization and partnership. Leading and managing volunteers requires similar competences as leading and managing paid staff. And in addition, the manager of volunteers must motivate people to create results together without providing salaries.

DUF sees volunteering as a two-way relationship: You need to balance the **needs of the organization** with the **motivations of the volunteers**. And you **cannot** order of force volunteers to do something they don't want to do – they will just leave the organization.

In order to match the needs of the organization with the motivations of the volunteers, it is a good idea to ask why volunteers like to work with your organization – and analyze how you can best motivate volunteers in their work. It is equally important to find out what demotivates volunteers.

WHEN

Look into volunteers motivations when you are analyzing the volunteer culture in order to design a project, when you design a volunteer policy and strategy.

Motivations can change along the way. Stay updated on volunteer motivations and experiences along the way in a project to ensure you create meaningful experiences for volunteers.

HOW

Below are described two exercises that can function as entry points to start a dialogue on volunteers motivation. The exercises can be made each on their own or following each other.

Drawing: What motivates volunteers in your organization and partnership?

Pictures can help you to reflect on the question and get a starting point for discussing what motivates and demotivates the volunteers in your organization and in the projects run by the partnership.

Draw fictive, typical volunteers in the organization, who are connected to the partnership and the project. For instance you can focus on a typical volunteer at the project management level and one at the project implementation level – or different types of volunteers for a specific area. You may consider the following factors:

- What **gender** do the typical volunteers have? **Age**?
- From which **social background**? Are they part of a **family**, are they married, do they have children? Do they have **education**? Do they have **work**? What kind of education and work?
- **How long time** have the volunteers been part of the organization?
- What is their **motivation** for doing volunteer work?

Based on your drawing you can consider the following questions:

- What does your presentation of the typical volunteer say about
  - Your organization?
  - Your target group?
  - Yourselves?

- Are there differences for men and women? Boys and girls?

- What motivates volunteers to join in and stay in the organization? What demotivates them?

- What does your organization do to motivate the volunteers to stay in the organization?

- What challenges do you face in regards to motivating volunteers?

- For which tasks and areas do you find it hard to recruit / motivate volunteers?

- Are there some types of volunteers that are not very represented in your organization? What are you going to do to motivate (the right) people to volunteer?

- What tasks / areas are volunteers least motivated by? How can you make it as meaningful as possible to volunteer for these tasks?

Conversation with staff and volunteers: What motivates volunteers in your organization and partnership?

Divide volunteers and staff into smaller groups. If board members participate, we suggest they join the group of volunteers or setup their own group.

Get the groups to discuss the following questions:

Volunteers with volunteers:

- What motivates me to work voluntarily in my organization? What motivates others?
- How does my organization motivate volunteers? What do I do to motivate others?

Staff with staff:

- What do I most enjoy in regards to working with volunteers in my organization? How does it motivate me in my work?
- How do I motivate volunteers?

Get together for a plenary conversation, where you share your perspectives and ideas for the following question:

"How are volunteers best motivated in your organization?"

WHAT MOTIVATES VOLUNTEERS?

In DUFs experience volunteers are motivated by many different things – depending on who they are and their life situation. The motivations below are common, but the list is not exhaustive:

- **Meaningfulness:** I involve myself in a cause, that is larger than myself. I make a difference.
- **Responsibility and conscience:** I feel that I have a sense of duty towards my society
- **Interesting activity:** I participate in an activity that is of interest to me and has a certain quality.
- **Community:** I'm socially stimulated by participating in a community (of action)
- **Learning:** I learn a lot through my engagement – and use my competencies
- **Influence and participation:** I have a say and I feel that I am listened to in regards to the activities I do. That makes me feel ownership to the work we do.
- **Personal recognition:** I feel recognized and valued for the work I do

Can you come up with other motivational factors?

TOOL

GOOD ADVICE ON ATTRACTION AND RETENTION OF VOLUNTEERS – AND HANDOVER

WHY

A recurring challenge in many youth organizations is to **attract** new volunteers, **retain** experienced volunteers and ensure **handover of experience** among experienced and new volunteers. It is important that you consider what motivates people to volunteer for your organization and cause, how you can best support and manage your volunteers to retain them and how you make sure the experiences of volunteers stay within the organization.

WHEN

It is an ongoing effort to recruit and retain volunteers – and to ensure sufficient handover.

HOW

When managing volunteers, it is important to talk about the following themes. We have come up with some ideas below each question, but it's important that you consider what will work for you.

How do you get a good start with a new volunteer?

Young people are often more eager to volunteer, where they feel connected to the cause, contribute meaningfully and feel part of a social community. It is important that a volunteer feels welcome and appreciated for the work they do. Some ideas:

- Have an introductory meeting where you welcome the volunteer, introduce your organization and hear about the volunteers own motivations and ideas for a meaningful volunteer experience
- Clarify expectations between the organization and volunteers. Be clear about how much time the role requires and how much the volunteer can commit to, how autonomous and creative the volunteer can work and organize regular check ins with each other
- Make a written role description, which details tasks, skills and role requirements
- Ensure volunteers know where they can get support
- Have casual conversations with new volunteers while they are working so that they feel appreciated and welcome in the organization

SOME QUESTIONS TO CONSIDER IN DIFFERENT PHASES OF A VOLUNTEER CYCLE

PHASE	THE ORGANIZATION	THE VOLUNTEER
Recruitment / Welcome and introduction	What are you passionate about? What are you good at doing? What values do we share?	How do I get started? How can I become part of the community? How do you do things here?
Retainment and management/ Task solving	How is it going? This is your contribution and value to the organization… What are you dreaming of?	What do I like the most? What do I gain from my engagement? What would I like to be part of developing?
Goodbye/Closure	What do you bring with you from your work here? What is your best advice to the organization? Can we say "see you later"?	What can I use in my life forward? What can I contribute to in the future?

- Invite new volunteers for social events so they get to know other people in the organization

How do you support your volunteers?
Supporting volunteers is important to retain them. Some ideas:

- Check in with volunteers regularly to support them if necessary – and to share important information about your organization.
- Meet up with volunteers and manage the tasks and work burdens together with the volunteers. Remember to balance their volunteer commitment with other commitments in life.
- Develop a peer support model, where volunteers support each other. This can also help retain experienced people in volunteer roles in your organization.

How do you motivate and retain new and experienced volunteers?
It is key to understand why people are motivated to volunteer and what keeps them motivated and happy. For some volunteers it is important to be constantly challenged and they may want to change roles and develop new skills. Some ideas:

- Find out the motivations of the volunteers and see if there are any specific skills the volunteer would like to develop
- Check in along the way to see if the volunteers are happy with their tasks and responsibilities – or if they would like to change their volunteer role and responsibilites.
- Provide support and encouragement for volunteers who are taking up new roles

How do you ensure handover among volunteers?
Young volunteers move on, but if you have an open and regular communication with your volunteers you can get a sense of when volunteers are about to move on. Some ideas to ensure handover:

- Encourage peer support and peer cooperation – so that volunteers learn from each other and support each other in solving tasks
- Do you have another volunteer ready to take over? Maybe the person moving on can suggest another youth who would be interested? Maybe the person moving on can mentor the new volunteer?

- Get feedback from the person experiences as a volunteer, what they have learnt and what they suggest for improvements. You can for instance do this through an informal conversation with the volunteer, a formal exit interview or a small survey.
- Invite the person, who moves on to stay connected with the organization through social media – so that they receive news and are aware of new volunteering opportunities.

THE DANISH YOUTH COUNCIL

TOOL

VOLUNTEER STRATEGY AND VOLUNTEER POLICY

WHY

There are many ways of working with volunteers – and no single answer to how it should be done. You may use the questions for a volunteer strategy and policy below as a starting point for discussing volunteer roles and relationships in your organization and make a set of written agreements on how to deal with volunteers.

A volunteer strategy may help you to decide how to recruit and involve volunteers to reach your organization's goals. It is a good idea to follow up on your strategy work by doing a more practice oriented volunteer policy.

A volunteer policy may help you to clarify expectations and divide roles and responsibilities among volunteers and staff.

WHEN

Create a volunteer strategy and a volunteer policy for engaging volunteers, when you do long term planning in the partnership or project. Revisit the strategy and policy, when necessary.

HOW

WHAT IS A VOLUNTEER STRATEGY?

- A strategy is a tool to formulate your goals and chose the best tactic to reach them
- A volunteer strategy helps you to translate your organizational vision into an overall plan for involving the volunteers to reach your organizational goals.
- It entails a focus on:
  - Why you involve volunteers
  - How you involve volunteers, the purpose and priority of the work they do, how you divide roles and responsibilities among staff and volunteers.

Start off your strategy work by **doing an analysis of the situation** and then **develop a strategic plan for reaching your objectives** based on your analysis. You can use the tools "Organizational landscape and volunteer culture" and "A dialogue on motivations" to analyze the volunteer culture and volunteer motivations in your organization.

Important questions for a volunteer strategy

Why do we want to involve volunteers in order to reach our goals?

- What is our vision?
- What goals are relevant in relation to involving volunteers?
- Why are the volunteers important actors in reaching these goals?

How do we involve volunteers in order to reach our goals?

- How is the voluntary work organized?
- What recruitment initiatives are necessary to reach our goals?
- What retainment initiatives are necessary to reach our goals?
- What handover initiatives are necessary to reach our goals?

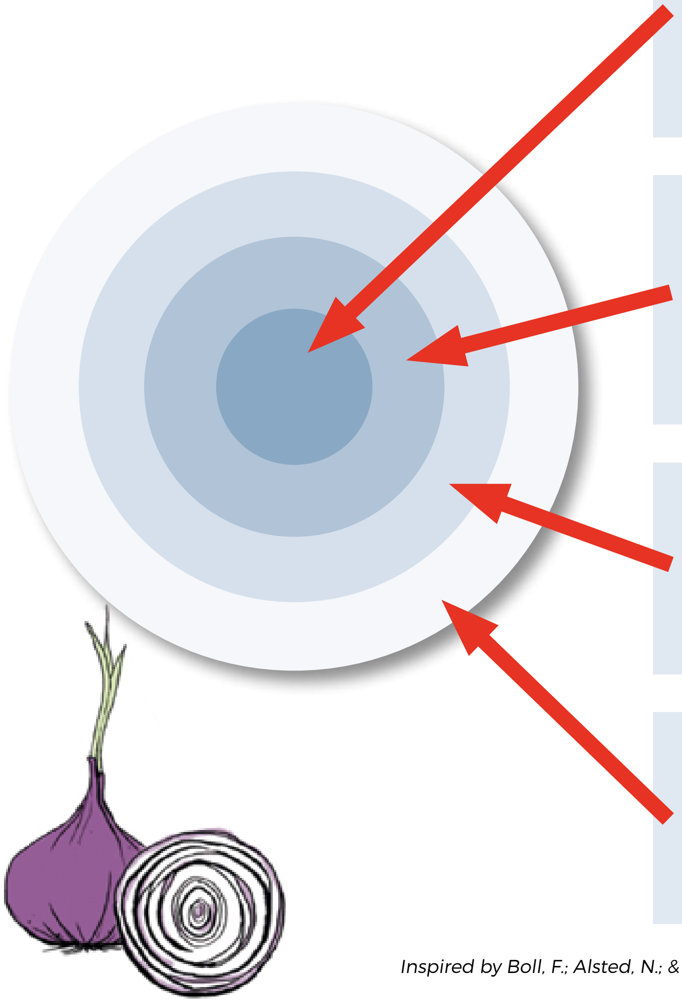
Does the volunteer strategy match our overall organizational vision?

Is our volunteer strategy short and clear, so that it is easy to communicate?

How do you ensure that your volunteer strategy is used in the organization and that all central actors, e.g. the board, staff and volunteers, feel a shared commitment to it?

Source: "Sådan skriver du frivilligstrategier og frivilligpolitikker, der virker". Boll, F. & Eskelund, C. (2013)

ONE ORGANIZATIONAL MODEL



Core volunteers:
- Time spent: High amount, long-term
- Responsibility: Several projects or activities
- Influence: At organizational or project level
- Competencies: Many and specific

Coordinators
- Time spent: High amount – long-term/short term
- Responsibility: To carry out a project or coordinate an activity
- Influence: At project level
- Competences: Specific to the project/task

Loyal volunteers:
- Time spent: Medium/low amount divided onto tasks
- Responsibility: To carry out tasks
- Influence: At activity level
- Competences: Specific to the task

Curious / newcomer volunteers
- Time spent: Low amount
- Responsibility: Low level of responsibility
- Influence: At activity level
- Competences: Few or specific to the task

Inspired by Boll, F.; Alsted, N.; & Hall, J. (2012) "Frivillig koordinering – Hvorfor og hvordan", Ankerhus

WHAT IS A VOLUNTEER POLICY?
- A volunteer policy is a tool to help you divide roles and responsibilities among volunteers and staff – and clarify expectations between the volunteers and the organizations.
- It entails a focus on:
  - The division of roles and responsibilities in practice
  - The expectations between the organization and the volunteers

Start off your policy work based on your **analysis of the situation** and **strategic plan**.
You can use the tools "Organizational landscape and volunteer culture" and "A dialogue on motivations" to analyze the volunteer culture and volunteer motivations in your organization.
Another way of analyzing volunteer roles and motivations is to look into volunteer roles in relation to their level of responsibility – as illustrated above.

It is also important to look into how the expectations of the organization match the expectations of the volunteers.

Volunteering is a two-way relationship. You need to balance the needs and expectations of the organization with the motivations of the volunteers.

Source: "Sådan skriver du frivilligstrategier og frivilligpolitikker, der virker". Boll, F. & Eskelund, C. (2013)

IMPORTANT QUESTIONS FOR A VOLUNTEER POLICY

What is the role of the volunteers?

- Which rules and regulations guide our work with volunteers?
- What is the relationship between the volunteers and the paid staff?
- How are decisions made and who has the final say?

What can the volunteers expect of the organization?

- What resposibility does the organization hold towards the volunteers?
- What does the organization commit to?
- What concrete tasks will the staff do?

What can the organization expect of the volunteers?

- What resposibility do the volunteers hold towards the organization?
- What do the volunteers commit to?
- What concrete tasks will the vlunteers do?

How does your volunteer strategy and the volunteer policy correspond with each other?

How do you ensure that your volunteer policy is used in the organization and that both staff and volunteers feel a shared commitment to it?

What happens when volunteers make mistakes or how do you deal with conflicts between staff and volunteers?

TOOL

DIALOGUE ABOUT WELL-BEING AND SOCIAL BEHAVIOUR FOR YOUTH LEADERS

THE DANISH YOUTH COUNCIL

WHY

For everyone to have a good and safe experience being a youth leader, it is important to have a dialogue about **how you are and how you behave when you are together**. When you talk about your individual expectations to your common everyday life, it helps everyone to feel more accepted, respected, and safe which results in more energy and drive to create changes together.

WHEN

It is important to have a dialogue about well-being and social behaviour **in the beginning** of your exchange to set the frame of how you act in your common spaces. It can however also be helpful to use this tool repeatedly throughout your exchange as lifestyles and relations can change, or if you start working with new volunteers.

HOW

Before you look at the questions, it is **important to create a safe space** in your group. Creating a both encouraging and safe group environment will help establish trust between you and **make it easier to discuss different matters openly**. This can be done by setting up a code of conduct for the conversation: For example, that everything expressed is kept confidential, that everyone should participate and share, and that everyone's experiences are handled with respect and taken seriously. When everyone feels comfortable sharing, you go through the questions:

COMMUNICATION AND TAKING PICTURES

- What rules do we have in the organization and in our team in terms of taking and sharing pictures of others and of each other?
- Is there anything in the project context that we need to pay special attention to or consider when we want to take pictures of project activities and volunteers?
- What rules do we have in the organization in terms of communicating about our work and the project (to others in the organization, on social media, in newspapers etc.)?

FALLING IN LOVE, INDIVIDUAL BEHAVIOUR, AND BOUNDARIES

- Does our organization have guidelines on intimate relationships between youth leaders and youth leaders/volunteers/locals?
- How can we talk about our personal boundaries? (at home, during activities etc.?) Is it important for us to know this information about each other, why/why not?
- What actions can you take if you feel someone is crossing your personal boundaries?
- How do you act if you witness others being exposed to something beyond their boundaries?

ALCOHOL CULTURE AND SOCIAL ACTIVITIES

- Where and when is it permitted and/or appropriate to drink alcohol during the youth leader exchange?
- How can we best ensure that our social activities (also after work) are inclusive and that everyone feels welcome? What could be an obstacle for this?

GENDER

POSITION PAPER

GENDER

What is gender all about and why is it important? How to work with gender equality?
If you are asking yourself these questions, this toolkit paper is for you. It presents DUFs definition of gender – as well as lessons learnt, ideas and tools for working towards gender equality in your project and partnership.

WHY WORK WITH GENDER AWARENESS AND GENDER EQUALITY?

Women and men have the same universal human rights. Nonetheless, young men and women experience different opportunities based on their gender. There are different expectations to young men and young women that influence their participation and influence - in their organization and society. In some contexts women and girls are marginalized and deprived of their rights on the grounds of cultural norms and tradition. And boys and men can experience pressures and barriers based on their gender. Gender roles and gender based power relations are found in organizations, on the job market, in politics and in the family.

DUF asks you to consider gender issues in your project, because we want young men and women to experience equal opportunities in their personal lives, organizations and societies.

Gender equality is not only a women's issue. It is the responsibility of both men and women to make sure that everybody experience equal rights, opportunities and respect – regardless of their gender.

HOW TO WORK WITH GENDER?

The concepts biological sex and gender help to understand how your project affects men, women, girls and boys.

What do we mean by **sex** and **gender**?

The term "gender" differs from the closely related term "biological sex".

Biological sex refers to the biological and physiological characteristics that define men and women.

- Women menstruate and are child-bearing.
- Men have testicles, women do not.

Gender describes the characteristics of men and women which are **socially determined**.

- In many countries, women earn significantly less money than men for similar work.
- In some societies it is not seen as appropriate for men to express their feelings. Women on the other hand are often expected to be caring, sensitive and emotional.
- In Saudi Arabia men are allowed to drive cars or ride bicycles, while women are not.
- In most of the world, women do more housework than men – and this work is less recognized than paid work.

The social expectations to men and women may vary greatly in different societies, depending on culture as well associal and political structures. And because gender expectations are socially negotiated, they can change over time.

The socially determined roles and relationships between men and women are often taken for granted and seen as natural. We need to analyze the understandings and practices that keep women and men in certain roles and relationships – otherwise, they will often just be reproduced.

When you plan and do your project it is a good idea to get perspectives of both genders and encourage people to plore power dynamics in their society, organizations and everyday work. DUF recommends that you look at the following themes:

Practical needs
Practical needs are the immediate needs in your present situation and have to do with what is expected of you in daily life. These needs can be taken into consideration, when planning activities in your organization to ensure that men and women can participate on an equal basis. Practical needs can often be met by practical solutions.

- What are the practical needs and limitations – of men and women in your project? In your organization?
- How can you take into account peoples practical needs when planning your activities?

Gender division of labor
Men and women are often engaged in different kind of activities – also in youth organizations and projects. When we look at the division of labor through a gender lens, we look at the roles, responsibilities and activities assigned to men and women according to what society and people around us think is appropriate.

In some societies, women are more engaged in household chores and childrearing than men and may have less time for community engagement and organizational work. In some organizations, men tend to take up leadership positions, while women are mainly employed in positions at a lower level.

- How is the labor division between men and women in your organization?
- How does that effect the participation and influence of men and women in your organization?

Access to and control of resources
Resources can be understood as time, status and financial means. You can also look at access to project activities.

The Danish Social Democrat Youth work together with Akbayan Youth. In one of the projects the partnership had decided to address issues of low participation of women in the Akbayan Youth activities.
Therefore the youth leaders planned a seminar, only for women. Nobody showed up for the afternoon seminar. The youth leaders were puzzled. When the women were asked, why they didn't come, it became clear that the women had no possibility to attend the activity. There were no locks on the houses, and in order to prevent theft, the women were expected to stay home in the afternoons. The activity was then scheduled for another time, when the women could participate.

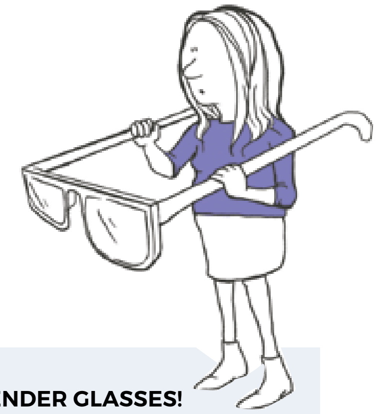
A person has **access** to resources when he or she is able to use and benefit from resources.

A person **controls** resources when she or he is able to decide over or take part in decision making over the use of resources. Control over resources therefore implies both 1) access to a resource or an activity and 2) taking part in decision making about the use of the resource or activity.

- Who takes part in which activities in your organization?
- Who takes part in making agendas and decisions in your organization or project? Do both genders participate equally in decision making?
- Who benefits from the work done in your organization/project?

When you want to change unequal relations between men and women, be aware that people have different **strategic interests**. Depending on the position, relationship and resources in an organization or in society, people may have different interests in either changing or maintaining unequal relationships. An old man with a leadership role may
have different interests than a young woman or man who are eager to have a say in an organization.

It is important to consider the relations between men and women with different economic, political and social status.
The better your understanding of interests and motivations, the better the chance for changing unequal structures



CAPACITY BUILDING FOR GENDER AWARENESS

DUF recommends that you build an understanding of gender roles and relations in your organization and project. In DUFs experience gender awareness training is most effective, when it touches on people's personal lives and experiences of being a man and a woman. Unless peoples' own lives are brought into discussion, there is a risk that gender awareness will only be an intellectual exercise without concrete impact.

PUT ON YOUR GENDER GLASSES!

Depending on the eyes that behold, we see different things in our daily lives and organizations. In order to change a gender related inequality or discriminatory practice in your organization, encourage others to take an interest in and be aware of gender issues.

This paper presents DUFs definition of gender – as well as ideas and tools for working with gender issues.

Our most important advice is to tailor your approach to your own organizational setup, the work of your organization and the context you are working in. That is why the paper doesn't give prescriptions or specific answers to what you should do. Instead we encourage you to think through themes, that we have found to be important to DUF supported partnerships.

We have included the tools used in DUFs learning activities – and we refer you on to other toolkits that we find inspiring. In doing so, we hope to stimulate your own thinking and ideas on how the methods and tools we present may be useful in your own work to create positive change.

There are many other ideas, approaches and tools that are used by young people in civil society organizations that are not included in this paper. Please share your own experiences, ideas and stories with us in order to make the toolbox more practically relevant for others. There are no deadlines and new pages and tools can be added at any time.

TOOLS RECOMMENDED BY DUF

There are a wide range of tools to support you in understanding gender issues and working towards gender equality in your project and partnership.

The tool Gender boxes can help you to get a conversation started about your understanding of the concepts biological sex and gender and the roles, expectations to and responsibilities of young men and women. The Gender matrix provides a framework for analyzing the roles and opportunities that men and women have in your organization and society.

For an extensive toolkit, we recommend the **the OXFAM gender Training Manual** and the **ACT Alliance gender inclusive rights-based manua**l.

Meet up with DUFs consultants

DUF can provide inspiration on how to design capacity building workshops on gender and give advice on how to integrate gender awareness and work towards gender equality in your project.

Consider to make use of local consultants to do workshops and support processes to strengthen the work with gender issues in the partnership and project.

THE DANISH YOUTH COUNCIL

TOOL

GENDER BOXES

WHY

In order to understand of roles, expectations and responsibilities for young men and young women, it is important to distinguish between sex and gender.

This exercise can help you to explore the social construct of gender and understand the difference between sex and gender.

WHEN

This exercise can be useful in the **early stages of planning a project**, as it strengthens your understanding of the gender roles and social norms at play in a specific context. Then you can design your project in a way that works towards gender equal participation and influence.

Also the exercise is useful when working towards **a shared understanding** of the concepts of sex and gender in an organization and the importance of ensuring gender equality.

HOW

Start by working in groups, then get together for a discussion in plenary.

Group work

Step 1) Each group will draw two big boxes on a flip chart paper and write “Woman” on one and “Man” on the other.

Inside each box, write down the messages women and men receive about what a “Woman” or “Man” should be... and the social expectations to men and women: “What keeps women and men in “their boxes””?

Step 2) Outside of each box, write the words and messages that are used about men and women who are not acting according to what is expected from them.

Plenary

Put up the posters on walls and take a look at them together.

- Do you see similarities between the posters related to women? The posters related to men?
- What messages and words relate to the biological sex?
- What relates to the social gender?
- What words are used about women and men when they do not live up to the social norms, expectations and messages you have noted inside the boxes?
- What happens when men and women can’t live up to the social norms and expectations – or deliberately step out of their boxes?
- Would you prefer to be a man or a woman outside the box?

Often people experience that they are classified by other people to be either inside or outside of ”the box” – in terms of their sexuality, gender identity and/or personal identity. When the ”boxes” are seen as the only right way of being a man or a woman in an organization or a society, they become a framework for oppression, sexism, homophobia, power abuse, control and violence.

Source: ACT Alliance

Hierarchal and patriarchal societies and structures are created and maintained by people. The ‘boxes’ live in people’s attitudes and behaviors – and in order to change oppressive structures, we need to encourage people to change awareness, attitudes and behaviors.

Sex refers to the biological and physiological characteristics that define men and women.

Gender describes the socially.

THE DANISH YOUTH COUNCIL

TOOL

GENDER MATRIX

WHY

Gender equality is about the right of every human to participate and have a say in things that affects them.

In all societies there are different expectations and functions associated with being a boy/ girl and man/ woman that influence their opportunities for participation and influence.

When you plan and carry out your project it is important that you consider the situation of both genders and work to create equal opportunities for all.

The gender matrix is a useful tool to:

- Start a conversation about gender
- Shed light on the relations between women and men/ girls and boys in your organization, local environment and in wider society
- Understand the existing roles, responsibilities, and rights of the two genders respectively
- Create a project that considers the cross-cutting requirement on gender
- Find out whether you need further information to understand the context and the different roles and expectations assigned to men and women/boys and girls

WHEN

Use the gender matrix when you:

- Consider whom to involve in the planning and preparation of your project. Make sure that the perspectives of both genders are included

- Prepare for your project – for instance during a preparatory study. Remeber to look into gender issues, when you do your context- and target group analysis and when you plan your activities.

The gender matrix is also a good tool to look into the organizational context and find out how both genders are involved in the organization.

HOW

Fill out a matrix for each gender (boys/men and girls/ women) - see the flip side of this paper.

Go through the boxes one by one – this works best in small groups to allow for conversation.

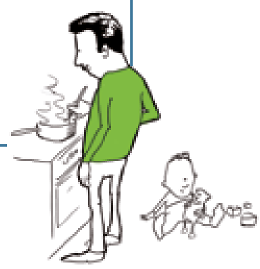
If you find out that you lack some of the information then discuss who to involve helping you understand more.

When you have finished your matrix consider how you need to plan and carry out your project in order to make sure that the needs and interest of both men and women are taken into consideration and that their right to participate and gain influence is fulfilled.

Be aware that gender relations are linked to other social identities, so that roles, responsibilities and rights will differ according to those as well.

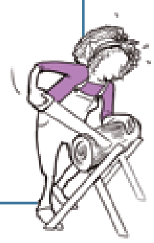
GENDER MATRIX FOR BOYS AND MEN

	RIGHTS AND DUTIES	WORK / ECONOMY	SOCIAL POSITION	PARTICIPATION IN DECISIONMAKING
YOUR ORGANIZATION				
LOCAL CONTEXT				
SOCIETY				



GENDER MATRIX FOR GIRLS AND WOMEN

	RIGHTS AND DUTIES	WORK / ECONOMY	SOCIAL POSITION	PARTICIPATION IN DECISIONMAKING
YOUR ORGANIZATION				
LOCAL CONTEXT				
SOCIETY				



ORGANISATIONAL ANCHORING

POSITION PAPER

ORGANISATIONAL ANCHORING OF THE INTERNATIONAL ENGAGEMENT

WHAT IS ORGANISATIONAL ANCHORING?

Organizational anchoring is about ensuring that initiatives, projects, activities, etc. become an integral part of an organization's existing engagement. Therefore, organizational anchoring is very much about considering what activities your organization has and why, and whether these are aligned with the purpose of your organization? This also applies to your international engagement. What international activities do you have? What value do they add to our organization? And how do these help to develop and strengthen your organization? This position paper focuses on why anchoring is important for international engagement and how anchoring can be understood in an organization.

THE ORGANIZATIONAL CONTEXT

DUF's member organizations are structured in various ways, and each organization has its own organizational structures and concepts. Some member organizations have an international committee that manages their international engagement. Others have it rooted in their local chapters and member boards, Finally, some use international consultants and their secretariat to ensure proper anchoring. No matter how you do it, the important thing is to ensure that your international engagement is anchored in such a way that it supports your national engagement and adds value to your organization. Hence, it is important to examine how your international engagement is organized within your organization.

ORGANIZATIONAL ANCHORING OF THE INTERNATIONAL COMMITMENT

In DUF, we greatly emphasize the anchoring of international engagements because we know from prior project groups that project anchoring and support increase the likelihood that the project succeeds and creates value for both the Danish organization and the partner organization.

The international engagement of an organization varies, and the type of activities and actions differ. Permanent activities such as study tours, delegations to international general assemblies and volunteer roles are often an integral and natural part of the organization's international work and image. At the same time, it is relevant to know why young volunteers are sent out and what the organization gets out of it. What value do young people take home and how does this link with existing national activities? For some organizations, international projects can be difficult

CONCEPT CLARIFICATION:

- **Public support** – This is about the broad public support for and commitment to Denmark's international development cooperation. Here, the focus is often on communication and information.
- **Organizational anchoring** – is about ensuring that the international engagement becomes an integral part of the organization and that the activities an organization undertakes are well-considered and add value to the organization.
- **Project anchoring** – Ensuring that the specific project is anchored in the organization. Often, this means that the project is sustainably driven as it becomes a priority for the organization to have the project. This makes the project viable and allows it to continue in the organization regardless of which volunteers are involved in the project.

EXAMPLE OF ORGANIZATIONAL ANCHORING:

Ung Mosaik, an umbrella organization for local Danish Pentecostal children and youth organizations, has developed a strategic framework that defines their international engagement, an action plan with six selected priorities and an annual cycle of work, which is supported by an international volunteer consultant.
The six priorities:

1. **Local chapter visits** (knowledge of international opportunities)
2. **National working groups** (ownership and member engagement)
3. **Study trips** (motivating members to participate in international activities)
4. **Volunteer offer** (young people who commit themselves for five to six months with a local partner)
5. **Camps and conferences** (making the international engagement visible)
6. **Fundraising** (securing financial resources to support international engagement)

to link to their other activities and make an integral part of the organization's purpose. In DUF, we have seen this happen when the international work is not properly merged with the other activities of the organization, or when it is difficult to prioritize and support the organizational anchoring of the international engagement.

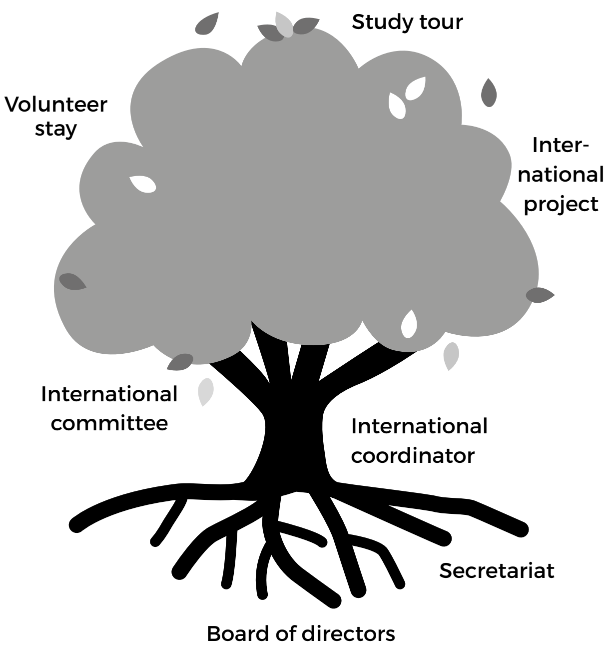
HOW TO ENSURE GOOD ORGANISATIONAL ANCHORING:

With the right tools and initiatives, you can have your international engagement support your national activities and strengthen your organization. You need to be aware of how your international engagement fits into your organization and of what value it brings to your organization's purpose and work. Hence, it is relevant from the start of an international activity or project, to think about the long-term organizational anchoring of your international engagement.

Good organizational anchoring helps to secure support for a project and that learnings and knowledge from a project are used elsewhere in the organization. As an organization, it is useful to organize yourself so that you can easily anchor your international engagement. In this context, it is relevant to reflect on your own organization's development potential and how your international engagement can support possible development processes and add value to your organization's work.

GOOD SUPPORT ENSURE GOOD ANCHORING

Experience gained from DUF's member organizations shows that good support for international engagement helps ensure good anchoring. This is illustrated with the tree below:



The roots of the tree (the secretariat and/or board of the organization) feed the trunk, (the international committee, local board, international coordinator, etc.) and the branches and leaves (the project activities in which the volunteers are engaged and which constitute the project's objectives).

As the tree illustrates, to be successful with your international activities, good backing and support are needed in the organization. In a voluntary organization, it is often the board that decides, based on the articles of association, which activities and projects the organization will engage in. In this respect, it is relevant to find out how your international work is supported financially, managerially and organizationally.

Good anchoring of international activities helps ensure their sustainability. Good anchoring nourishes a project and allows it to grow.

Good examples of support from the organization:

- *International projects in DUF's international pool strive for good relations with their board and the rest of their organization:* This results in a clear direction for the international work and promotes synergy between the national and international work. The international work has value for a wide range of of volunteers in the organization.
- *The organization has a good overview of which volunteers participate in international general assemblies and study tours, and why:* The focus is on applying the new knowledge in the organization and new competencies are put into play in other parts of the organization's work.
- *International engagement is a strategic priority for the organization, helping to retain and recruit volunteers to the organization.*
- *The organization ensures that projects do not rely on individuals and that they are strategically embedded in the organization's purpose and work.* This will reduce a vulnerability in the projects and help to lift the projects, independent of the time/resources of individuals.

HOW TO WORK WITH ANCHORING?

In order to work on anchoring the international engagement, it is relevant to know where the idea came from. In DUF, we see that the idea can come from several places. Via a focus group, we identified two specific groups from which a project idea can evolve:

1. The board, the organization's highest authority, decides that the organization should engage in international activities.
2. Volunteers or members of the organization get a good idea for a project with a partner in another country.

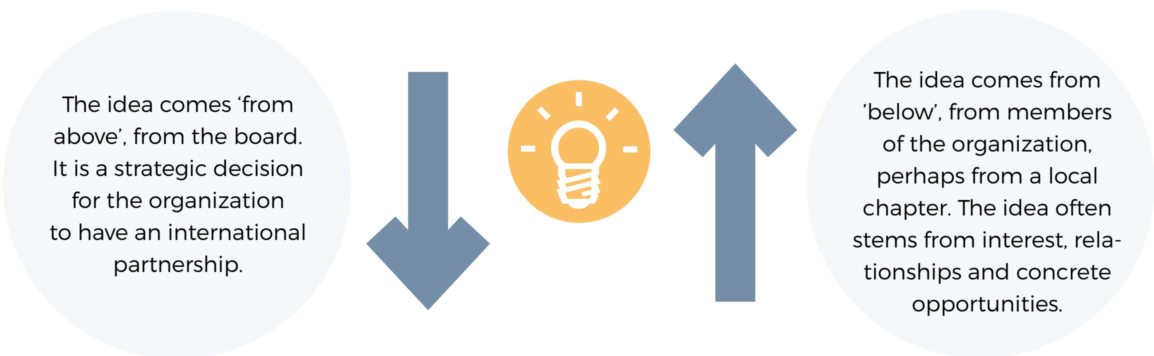
Whether the idea comes from above or from below, there are some questions you can ask yourself to help anchor the project.

If the idea comes from above, you might ask yourself:

- Are the members and volunteers of your organization interested in the project?
- Is it clear how a new partnership creates meaning in your organization and for the volunteers?

If the idea comes from below, you might ask:

- How can the project idea be supported by the rest of the organization?
- Do the project idea and a new international partnership fit into the organization's other activities?
- Is there managerial and administrative support for the project?



THE DANISH YOUTH COUNCIL

TOOL

ORGANISATIONAL ANCHORING OF THE INTERNATIONAL ENGAGEMENT

WHY

International activities are more likely to succeed and create value for your organization and volunteers if your international engagement is supported and anchored organizationally.

HOW

As an organization, it is useful to organize yourself so that you can easily anchor your international engagement. In this context, it is relevant to reflect on your own organization's development potential, and how your partnerships, volunteer exchange stays, etc. can support possible development processes and add value to your organization's work. The three-phase model can help you with these considerations:

THE THREE-PHASE MODEL

The three-phase model analyses, describes and enables organizational anchoring based on three overlapping and interrelated phases. The model can help you understand how your international activities relate to the rest of the organization.

The three-phase model can be used by a project group, a board, an international committee or a secretariat. You should start with your current situation in the organization and with those people that need to be involved during the anchoring process. The three-phase model can be used both for new initiatives and for initiatives that are already well underway.

The following presents the three-phase model, which is based on the following interrelated phases:

CLARIFICATION PHASE:

The clarification phase is about understanding the added value of international engagement for your organization's purpose and work. When everyone understands and argues the value of your international engagement, it is easier to anchor as it is prioritized and supported internally within the organization. At the same time, a good understanding of value can help motivate young volunteers to go on study trips or take the initiative to launch new international initiatives.

QUESTIONS FOR THE CLARIFICATION PHASE:

Start with a self-reflection and ask yourself some questions about the initiative you are about to launch or are already doing.

Start with the questions that are appropriate for your international initiative.

- Why do you do international work?
- Why is this international project interesting?
- Why do we send volunteers on study tours/to international general assemblies?
- What do the volunteers and the organization get out of the international work, project, study trip, volunteer stay etc.?

THE THREE-PHASE MODEL

The three-phase model was developed by DUF's focus group on organizational anchoring in 2020

EXAMPLES OF THE VALUE OF INTERNATIONAL ENGAGEMENT:

- It can help attract and retain volunteers
- It provides unique skills, especially in communication, facilitation and project management
- It develops young leaders
- It promotes an international outlook
- It creates popular support for development aid
- It helps to make young people visible as resources and to focus on democratically built organizations where young people have a real voice

ANALYSIS PHASE

In the analysis phase, you establish a better understanding of your organization and organizational structure in relation to how you anchor your international engagement.

Here, you seek to understand and clarify what your organization already has in terms of formal documents, culture and practices, whether there is a link between international activities and the organization's other activities, and the ownership and involvement of volunteers. The analysis phase will help you navigate your organization and ensure that your international engagement adds value and is anchored in the best possible way.

QUESTIONS FOR THE ANALYSIS:

Start by analyzing how your international engagement relates to your organization.

- How does your international activity/engagement interact with your purpose, vision, values and other national activities?
- What is the relationship between your international activity/engagement and national activities?

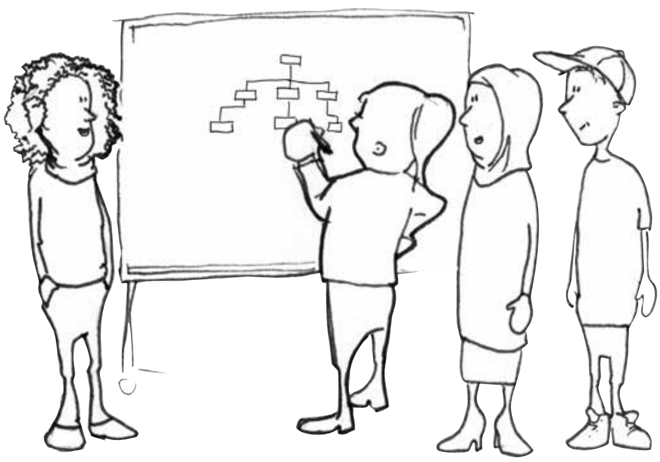
ANALYSIS OF OWN ORGANIZATION:

Start by drawing an organizational chart of your organization. Here, you may include formal structures and documents such as articles of association, strategy, volunteer policies. Moreover, you should also include your organizational set up: international project groups, international committees or international coordinators, executive committee, decision-making basis of the board, national activities, secretariat, etc.

The exercise aims to create a better understanding of your organization and to identify which formal documents and structures you need to deal with to ensure good anchoring. Then you answer the analysis questions, which you can also add to your organizational chart.

ANALYSIS QUESTIONS:

- Is your international engagement part of your statutes/strategy/volunteer policy?
- Are your international activities a set practice/culture in your organization?
- Is the international work visible in your organization?
- Are the secretariat and the politically elected leadership aware of the organization's international work?
- Has the organization addressed/related to why it does international work?
- Who has decision-making authority over your international activities in the organization and how are they involved?



- Are there examples in the organization where international work has inspired national work and vice versa?
- Is the value of international engagement visible?
- Is there a link between purpose and vision (in each organization) in your international partnerships?
- Have you reflected on the desired development of the organization based on your international work?
- To what extent and how does international work contribute to learning and development in your organization?
- How and to what extent are volunteers/members of the organization involved in your international work?
- How to ensure ownership and motivation?

Once you have analyzed your organization and set-up, you will have a better understanding of how to ensure good anchoring. Now you know if your international activity makes sense for the organization and if it lives up to the organization's purpose. It helps you to understand what the rules are, who needs to be informed, who makes the decisions, how volunteers are involved and if and how there is a link between the national and the international.

WHAT IS THE DIFFERENCE BETWEEN ORGANIZATION AND ORGANIZATIONAL SET-UP?

Organization: Focuses on the formal structures and is often referred to as an association of individuals, groups or the like. It is established to achieve specific goals, e.g., the pursuit of a particular professional or political interest. It can be a board, committees, statutes, etc.

Organizational set-up: Focus on the organizational actions, incidents, dramas, successes and relationships that actually take place. It can be decision-making, conversations, etc.

PROJECT VISIT

TOOL

CONSIDERATIONS AND CHECKLIST BEFORE TRAVELLING

WHY
It is useful to be well-prepared for a project stay or project visit, as the local context in the project country might be very different from your home country. By being well-prepared, you are more likely to avoid different hurdles or potential stressful situations.

WHEN
Before leaving for a project visit, a monitoring trip, a youth leader exchange etc. it can be beneficial to go through the lists below well in advance, for example a month before departure.

HOW
The list of considerations and the checklist are helpful suggestions for you to think about or bring on your journey. Go through them by yourself or together with your project group if more of you a travelling together.

CONSIDERATIONS BEFORE LEAVING HOME:

- [ ] Are you being picked up from the airport upon arrival and do you have contact information on the person picking you up?
- [ ] Do you need to bring an extra phone (e.g. a non-smart phone) and a special or an extra credit card?
- [ ] Are there any religious holidays, bank holidays or events such as national elections during your stay, which you should consider?
- [ ] How is the weather? Do the weather patterns change across the country?
- [ ] Are there any local requirements, customs, or norms regarding dress code?
- [ ] Who knows where you are during your stay and how can they reach you?
- [ ] Are there anything you need to prepare in terms of applying for visa? (e.g. do you need to bring passport photos or money in a specific currency?)
- [ ] If you have any doubts about visa, we advise you con tact the relevant embassy or consulate well in advance before your departure.

We encourage you to download the phone application "Rejseklar" from the Danish Foreign Ministry and "MySafeTravel" before departure. Additionally, we recommend that you sign up on Danskerlisten via the app "Rejseklar" or via this link: danskerlisten.um.dk. This will enable you to receive urgent information about the country you are visiting.

CHECKLIST:

- [ ] Find contact information for local emergency contacts, such as the local ambulance and police.
- [ ] Find information about the nearest hospital (also private hospital) and emergency room.
- [ ] Find contact information of the responsible Danish embassy or consulate.
- [ ] Make a copy of your passport, insurance information and visa, if possible.
- [ ] Pack a small belt bag or purse.
- [ ] Buy all medicine needed for the whole stay if you take medicine regularly.
- [ ] Pack all medicine (incl. patient information leaflets).

THE DANISH YOUTH COUNCIL

TOOL

RISK MATRIX – MAPPING EXTERNAL RISKS IN INTERNATIONAL PROJECTS

WHY

This tool can help you identify and talk about possible safety and security risk factors before your project stay or visit. It is important to have a conversation about security and safety with your organisation before travelling to ensure that everyone is well prepared for travelling abroad or sending out volunteers internationally.

WHEN

The matrix is intended to help create an overview and to help you and your organisation to consider different security aspects **before** travelling. The tool is best used in a conversation with your partner organisation, for example at a preparation meeting. Beside this tool, you are advised to consult the travel guides by the Danish Foreign Ministry or guides on apps, such as "MySafeTravel".

HOW

Go through and **discuss each risk factor** in the Risk Matrix and tick off the categories 'low-middle-high' for both probability and consequence. Analysing the - **probability**, you can look into: how likely is it that the risk in question will happen in this context? Examining the **consequence**, a helping question is: How serious are the consequences of the risk in question if it happens? Remember that there can be a different probability or different consequence of the risk factor, if you are analysing it from e.g. a male/female/minority/non-national perspective.

After going through all the possible risk factors, it is time to get a better understanding of the **risk level** by analysing the nexus between the probability of the risk happening and the consequences of it, if it happens. A risk factor with a high consequence can have a low risk level if the probability of it happening is very unlikely. On the other side, a risk factor with low consequences can have a high risk level if it has a high probability and thereby happens often.

Therefore, when you have filled out the matrix it is important to analyse which risk factors scored **high or middle on probability**, as these will then be the risks most likely to happen during your stay. It is therefore important to talk about the respective consequences and **how you can reduce the likelihood** of some of the potential risks from occurring.

For example:

a. In Tanzania, the risk factor 'traffic accidents' has a high probability and can have a low, middle, and high consequences. To minimise the probability and the consequences of it happening you can agree on rules, such as no driving without seatbelts or after dark.

b. In Egypt, risk factors relating to 'unreliable authorities or police' can have high and uncertain consequences and both low, middle, and high probability. E.g. Taking a picture in public can lead to fees if national military personnel is in the picture. The probability of it happening will for example depend on your knowledge of local rules and regulations.

POSSIBLE RISK FACTORS	RISK LEVEL					
	PROBABILITY			CONSEQUENCE		
	Low	Middle	High	Low	Middle	High
Political unrest / demonstrations /riots						
Diseases / illnesses						
Theft / assaults						
Unreliable authorities or police /corruption						
Violence / shootings / attacks						
Terror attacks / kidnapping						
Traffic accidents						
Natural disasters / unreliable seasons						
Spying / surveillance / hacking / ID theft						

CONTINUE THE CONVERSATION

Remember that your organisation has the responsibility for security and safety when sending volunteers abroad and it is therefore a good idea to talk about safety and risk prevention with them before your departure. Examples of questions you can ask your organisation:

- Who in the project group and/or secretariat is responsible for the security during travel?
- What do you do in case of an emergency? Who do you contact?
- What is the contact number of your insurance company? What does your travel insurance cover?
- Have you informed your organization about your travel destination, dates and prided information about next of kin in case of an emergency?
- Have you and your organisation talked about any areasof the city/country or any situations to be especially aware of or avoid?

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